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**Theory and Practice  
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## Preface

The *Preface* to this new issue of *Theory and Practice of Second Language Acquisition* offers a short introduction for new readers to familiarize them with the origins of the journal (as is presented in each volume as part of the *Preface*). It also provides an introductory comment on the contents of the present issue (9/2).

*Theory and Practice of Second Language Acquisition* was founded as a journal offering a space for discussion among both Polish and foreign scholars working in the areas of generally understood second/foreign/multiple language acquisition and learning. It seems to have fulfilled its mission as a journal on the rise. The present volume marks the ninth year of its presence in the scholarly world, a period in which it has gained considerable popularity. We receive more and more qualified submissions from Polish and foreign researchers representing their more recent research. Since its foundation, every consecutive issue of the journal has welcomed contributions from many renowned researchers, including Peter MacIntyre, David Singleton, Larissa Aronin, Sarah Mercer, Tammy Gregersen, and Jean-Marc Dewaele, among others. Also, the fast-growing number of Open Access downloads testifies to the journal's increasing popularity, as does the backlog of articles already accepted and awaiting their turn to be assigned to individual issues for publication in print. This is why we have decided to increase the number of research papers published in a single issue for the third time: in the first years of the journal's existence there were six, whereas the present issue includes eleven articles. Before an article appears in print, it is much earlier put online as an Online First publication (not assigned to a specific issue yet). It is the journal's ambition to demonstrate new trends and hitherto unknown venues for research in SLA, focusing both on theoretical discussions and the practical solutions to problems that are based upon them. Our purpose is not only to publish and share with our readers contributions from well-known and respected scholars, but also to promote young researchers from all over the world, who often present fresh

and innovative ideas or open up new perspectives on issues already under discussion. In other words, the journal serves as a venue for the exchange of ideas between well-established academics and those who have been inspired by them. In terms of its content, the journal presents contributions on issues ranging from purely linguistic and cognitively-oriented research on language acquisition processes to psycho- and sociolinguistic studies, always trying to feature the most recent developments in terms both of topic choice and of the methodology of research. We publish our journal through an open access system, where the entire production process is executed online and the final product is available to everyone, thus offering an opportunity to share ideas through a broad, effective, and economical mode of dissemination. We maintain high standards and quality, which are guaranteed by the international Editorial Board of *TAPSLA*, whose members are well-known Polish and foreign experts on a wide range of second language acquisition issues. The journal is indexed in numerous databases, including Scopus. It is published by the prestigious Polish academic publisher, Wydawnictwo Uniwersytetu Śląskiego (University of Silesia Press), which provides an experienced team of editors to oversee the copyediting and technical side of the production. Updated information and all the issues published so far are available on the journal webpage at [www.tapsla.us.edu.pl](http://www.tapsla.us.edu.pl).

The present volume (9/2) offers a selection of texts most of which report on qualitative research. It brings attention to various issues related to teacher identity, and also success and failure in the context of language learning both in terms of teacher effectiveness and learner success in language development on multiple levels of competence and ability. The issue opens with a text by Joanna Rokita-Jaśków and Dorota Werbińska entitled “Language Teacher Identity and Emotions in a Duoethnographic Narrative: The Perspective of Teacher, Parent, and Teacher Educator.” The authors investigate issues related to teachers’ understanding of themselves as professionals and their emotional involvement in the teaching process as an important part of their identity. In this interesting case study, which employs innovative qualitative methods (duoethnographic narratives), the authors share with the reader their reflections on the emotional dimensions of being a FL teacher from the various perspectives of former school language teachers, parents, and language teacher educators. The emotional experiences in all three roles demonstrate that emotions are not only and most obviously psychological entities, but also, and importantly, social constructs. Similarly, in the next text, “Language Teacher Identity Outside the State-School Context,” Kirsten Hempkin emphasises the importance of understanding language teacher identity, and demonstrates it first by an extensive overview of literature in the field, followed by a case study of two language teachers. Their professional career made them leave state-school work and they are now teaching outside it, seeking some new stability and identity. The change

of context can be considered a challenge for both of them, one which may possibly (re)form their professional identity. The results of the narrative study demonstrate that teachers' own experiences as learners and their emotions are driving forces in identity change. Katarzyna Budzińska, in her text "Language Teacher Wellbeing in the Private School Context: A Case Study," also looks at the non-state-school context, focusing in her empirical study on a selected private language school with a view to demonstrating how it contributes to teacher well-being, a necessary condition for successful teaching. It is one of a small number of studies that have examined private language education and its functioning in the language education sector, presented as an institutional case study. On the basis of the data collected through open questionnaires, in-depth semi-structured interviews, and participant observation, the author uncovers and discusses the factors that contribute to the flourishing of the group of teachers in this language school. These factors operate on an institutional level through effective policies, organization, and management as well as professional growth opportunities offered to the teachers, adequate teaching resources, and appropriate work conditions. The author presents the school as a model example for others to follow. The following text, "Diagnostic Abilities of Novice Teachers" by Ewa Tołoczko, also focuses on foreign language teachers. By means of structured written reports, the novice teachers in the study comment on critical moments in their teaching process. In this interesting qualitative study, the author tries to diagnose beginner teachers' abilities to use theoretical knowledge and their still quite limited classroom experiences to see to what extent they are able to problematise the realities of their classrooms at the moment of their occurrence and how these can affect their future performance as effective foreign language teachers. The fifth text in this issue of the journal, which discusses foreign language learners' successes and failures and is entitled "'Three months on, I still sound like an Anglophone': Tales of Success and Failure Told by English and French Tandem Partners," is authored by Sylwia Scheuer and Céline Horgues. The article reports on a study which employed dual language work in pairs in order to collect data. The performance of each pair was video-recorded and supplemented by a feedback session of the expert versus the novice participant. The participants' own perception of their progress in pronunciation in either English or French was diagnosed on the basis of the final questionnaire narrative data. The study demonstrates the effectiveness of informal learning of pronunciation as measured by learners' spoken output and their own perceptions of success (or alternatively, failure). The next text, by Katarzyna Nosidlak, entitled "Hopeless Cases or Just Hard Nuts to Crack? Stories of 'Difficult' Foreign Language Learners," takes up the interesting theme of how learners may come to be labelled by teachers and how this process can affect learners' own perceptions of themselves. The author points to the absence of this topic in teacher training programmes. In her own

study, the results of which she presents in the article, Nosidlak demonstrates how teachers assess their “difficult cases” of learners and diagnoses common categories of assessment with the view to commenting on how teachers form their opinions about the learners whom they find problematic. The aims of the following text, by Joanna Pitura and Heejin Chang, “Tools for Scaffolding the Development of L2 Speaking in English-medium Higher Education: Lessons from Poland and Australia,” is twofold. The authors hoped to answer the related questions of how scaffolding can be implemented in designing teaching tools for development of L2/FL speaking skills, which is always most challenging for L2/FL learners, and how the students in two learning contexts (Poland and Australia) perceive these tools. They applied scaffolding successfully to map instructor, peer- and technology-based tools in learning activities, resources used, technology, and feedback given to learners on their achievement. A different topic is investigated in a questionnaire- and test-based study presented by Teresa Maria Włosowicz in the text “The Relationship between Students’ Motivation for Studying Business English and Their Knowledge of Business English and Its Terminology.” The author’s major concern is to diagnose the relationship between motivation of English major students for studying Business English and their actual knowledge of the field, including business terminology, economic concepts, rules of business correspondence, etc. The results of the data analysis demonstrate that motivation is a significant but not a sole factor in developing the Business English competences of students, who need to be engaged in an extensive study of the field. The subjects express their awareness that both sustained motivation and intensive effort are necessary in order to make progress in Business English abilities. The next article, by Liljana Mitkovska, Eleni Bužarovska, and Natasha Stojanovska-Ilievska, entitled “Acquisition of Structures at Syntax-Discourse Interface: Post-Verbal Subjects in L2 English,” looks at the issues of morphosyntactic development of language learners and possible interference of their mother tongue (Macedonian) on English sentence structure. The initially assumed difficulties the learners may encounter were tested by means of a grammaticality judgement test and a correction task. It was confirmed that Macedonian learners of English accept English sentences more often if they follow L1 structures. The issues of acquisition and learning of foreign language vocabulary are the focus of the next article, authored by K. James Hartshorn and Aylin Surer and entitled “Contributions toward Understanding the Acquisition of Eight Aspects of Vocabulary Knowledge.” This quantitative study looks at eight selected aspects of vocabulary knowledge, and measures accuracy levels across word knowledge aspects by means of ANOVA. The authors believe that their results will contribute to the development of L2 vocabulary acquisition theory. In the closing text of the present issue, “The Impact of Orthographic Transparency and Typology on L2 Learner Perceptions,” Rachel Garton examines issues related

to orthographic accuracy and typology as significant factors in development of L2 literacy, which are in fact understudied in the context of SLA. Additional emphasis is placed on the affective dimension (attitudes, motivation) as individual factors contributing to one's ability to read and write in L2. The author reports on a cross-lingual study, in which the orthographic transparency and typologies of 26 languages, versus learners' perceptions of their own L2 literacy development, are discussed in terms of the perceived difficulty of the orthography and a self-assessment of literacy skills. The findings show that orthographic transparency is more significant than typology for learners' perceptions of their level of L2 literacy.

We would like to emphasize that although the articles contained in this issue offer a selection of reports on empirical research, they are also strongly grounded in solid theoretical bases and overviews of the literature in a given area. The methodology used in these studies is mostly qualitative, but in some cases this is accompanied by quantitative analysis. The issue covers a whole array of different dimensions of success and failure, as expressed by FL learners, teachers, and teacher trainers at various stages of their language acquisition and professional development and experience. We believe that the research presented here and implications that can be derived from it have interesting potential not only for language practitioners but also for teacher trainers and, importantly, for the content of teacher training programs.

As our journal is fully published online in open access, our contributors are all able to reach a wide readership around the world to present their research and thus, to get feedback on their ideas. We hope that researchers, teachers and students can all benefit from the present issue of *TAPSLA* and will find the articles published here not only useful but also inspirational. We would therefore like to thank all the authors for their contributions and, traditionally, extend our invitation to all Polish and foreign researchers and academics to share their work with us by submitting it to the journal in the future.

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# Articles





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## Language Teacher Identity and Emotions in a Duoethnographic Narrative: The Perspective of Teacher, Parent, and Teacher Educator

### Abstract

Teacher identity building rather than learning teaching in terms of skills and subsystems has recently been acknowledged as a priority in future teacher preparation. Several teacher identity models have been offered, including the *3A Language Teacher Identity Framework* (3ALTIF) (Werbińska, 2017a) in which teacher identity comprises affiliation (teachers' willingness to teach), attachment (teachers' beliefs related to their teaching) and autonomy (teachers' agentive, reflective, and resilient powers). With hindsight, it seems that the 3ALTIF, which drew on other identity models available at the time of its conception, does not address the affective side of language teacher identity explicitly enough and therefore can hardly embrace the uniqueness of this profession. That is why we decided to explore the issue of emotions more deeply and conduct a lengthy duoethnographic narrative to consider the 3ALTIF's 'missing' component for the future 'improvement' of the 3ALTIF. Duoethnography was chosen as a qualitative research method thanks to its novelty, its suitability for investigating identity issues and the opportunity it provides for us to explain and express ourselves. In our duoethnographic dialogues we focused on our own emotions from three perspectives: former school language teachers, language teachers as parents, and language teacher educators, all of which are the roles we have played. The findings reveal our experience of emotions that once affected us and also suggest that emotions are not only psychological constructs but have social dimensions as well.

*Keywords:* language teacher identity, emotions, duoethnography, teacher narratives

Research on teacher identity and, analogously, language teacher identity has been flourishing in recent years. Several anthologies of identity research (e.g., Barkhuizen, 2017; Cheung et al., 2015; Gallardo, 2019; Schutz et al., 2018), monographs (e.g., Alsup, 2019; Gray & Morton, 2018; Rudolph et al., 2020; Werbińska, 2017a), including those with practical activities for teachers and learners (e.g., Olsen, 2016; Barkhuizen & Strauss, 2020), special issues in language journals (*TESOL Quarterly*, 2016; *Modern Language Journal*, 2017; *Konińskie Studia Językowe*, 2018) and numerous journal articles and theses have expanded our vision on identity and the language teacher. It is clear that identity provides the key to the language teaching profession and to educating future teachers. This is an important shift given that only three decades ago teacher education, at least in Poland, was mostly restricted to teaching concrete skills and systems, with very little room for the role of reflection. The focus on identity and all that it involves allows teachers to be ‘more of themselves’ within the contexts in which they work and to consider identity as a dimension of their professionalism. In this paper, we acknowledge teacher emotions as vital in (re)narrating and (re)constructing our own language teacher identities.

The immediate stimulus for the present study was the recent appearance of various identity definitions and models in the literature that accommodate teacher emotions. This led to a need to overhaul the 3ALTIF framework which was offered by one of us (Werbińska, 2016) for conducting teacher identity research (Werbińska, 2017a, 2017b). The 3ALTIF model consists of three ‘A’ components: affiliation which stands for teachers’ willingness to teach, attachment which signifies teachers’ beliefs related to their teaching, and autonomy which embraces teachers’ agentic, reflective, and resilient powers. Although the three components, drawn from the available teacher identity models at the time of the 3ALTIF’s conception, are undoubtedly permeated with emotional connotations, the 3ALTIF does not have a clear fourth component that would cover the affective side of language teacher identity.

The present project is focused on the duoethnographic dialogues in which we—two experienced English language teachers—talk about language-related emotions within the context of the roles of school language teacher, parent, and language teacher educator. We begin with a discussion of teacher identity models and the way identity has been conceptualized in recent years. This is followed by a discussion of teacher emotions and the role they play in any understanding of teacher identity. We then present a brief description of the design of our duoethnographic research project upon which this paper is based. Against this background we provide and discuss our findings from the study, focusing on emotions as seen from three teacher perspectives: school teacher, parent, and teacher educator. In the discussion section, we explore what this reveals about teacher emotions in language teacher identity.

## Theoretical Framework

In the following sections, we turn to the literature in order to address the most popular models of language teacher identity and the nature of teacher emotions. Both teacher identity models and emotions experienced by language teachers provide the theoretical foundations for the study we have conducted.

### Teacher Identity Models

The identity frameworks that provided the conceptualization models for the creation of the 3ALTIF were: Wenger's (1998) *Communities of Practice*, Gee's (2001) four perspectives on *the N-Identities, the I-Identities, the D-Identities, and the A-Identities*, Varghese et al.'s (2005) distinction between *identity-in-discourse* and *identity-in-practice*, and similar to it, the distinction between *narrated identities* and *enacted identities* (Kanno & Steward (2011), Clarke's (2009) *diagram for "identity work,"* and Benson's et al.'s (2013) *facets of identity*. Appearing after the creation of the initial 3ALTIF model in 2014, Pennington's (2015) *Frames of Teacher Identity* and Trent's (2015) *Framework* were added and treated as a confirmation of the 3ALTIF's core constituents. Although emotions were undoubtedly taken for granted by the authors of identity frameworks, in all these models the word *affective* or *emotional* was not explicitly used.

Recent years have witnessed a new focus on the emotional complexity of language teachers. What teachers encounter, undergo, and tolerate, and how this experience relates to teachers' practices has prompted a surge of interest in the study of language teacher emotions. Naturally, this has been reflected in teacher identity definitions and frameworks that now tend to include the emotional component. Barcelos (2015), for example, comments that one of the moral dimensions of language teacher identity is teachers' emotional involvement, which determines what teachers do and what they suppose is right to do. Golombek (2015) views identity-related tensions as "emotional dissonance" between the emotions appearing in a given context and those that would be expected under certain circumstances (p. 471). Departing from the Douglas Fir Group's (2016) framework for language teaching, De Costa and Norton (2016) highlight the emotion and affect which English language teachers experience in their job, whereas Varghese et al. (2016) suggest that teachers' emotional lives bring about agency in identity formation. Harbon (2017, in Barkhuizen, 2017) argues that in her acknowledgment of the generational aspect of language teacher identity development, "the affective" makes a lot of sense (p. 180). For Day (2018), teacher professional identity is linked to emotional energy and emotions, which

represent one of the core strands of teacher professional identity. Fairley (2020), in turn, distinguishes four competencies that are crucial for language teacher identity development, and “emotional literacy” (p. 9) constitutes one of them.

Clearly, the body of literature devoted to exploring teacher identity is constantly expanding while the inclusion of the affective component has enriched teacher identity research.

## **Language Teacher Emotions**

It has been noted that an interest in emotions in English language teaching has developed from the affective turn (De Costa et al., 2019). The emotional state of the learner, or affect, has been recognized as an important individual variable (e.g., Gabryś-Barker & Bielska, 2012) influencing second language learning in the classroom, with learner anxiety initially being the most widely studied classroom emotion. It is only recently that the focus on emotions has been shifted onto language teachers (e.g., Martínez Agudo, 2018). This interest resonates with developments of research within Vygotskian sociocultural theory, positive psychology, critical applied linguistics, or discourse analysis (De Costa et al., 2019). The change of focus from learner to teacher emotions can be attributed to their reciprocal relationship. It has been speculated that only when the teacher’s own well-being has been provided for, can they cater for the well-being of their learners and create a positive classroom climate conducive to learning (Gabryś-Barker, 2012).

Two major approaches can be distinguished in relation to the study of language teacher emotions (De Costa et al., 2019): the cognitive and the social. The cognitive approach assumes that the teacher is able to look after their own well-being by recognizing the emotions they feel and learning to manage the challenges encountered in their professional growth. From this viewpoint, the responsibility for the regulation of emotions, which is a component of emotional intelligence, is placed on the individual teacher (Benesch, 2019, p. 1112). The social approach, on the other hand, looks at how teacher emotions are generated by the teaching contexts at macro-levels (e.g., language policy), meso-levels (e.g., the school community), and micro-levels (e.g., teacher identity), which would comply with Bronfenbrenner’s (1979) socio-educational model of human development. In this view, the impact of macro-level forces, such as globalization and neoliberalism, are of particular import for English language teachers, whose professional tool is a global language that is hugely influential socially. The resultant commodification of knowledge of English means that language teachers are encumbered by external constraints, such as the pressures of the accountability involved in having to prepare their students for high-stakes examinations. This burden often creates an ethical dilemma between what

teachers would like to do on their own and what they are expected to teach by various stakeholders, be it parents, head teachers or local governments.

Within the social framework of studying teacher emotions particular attention has been drawn to the notion of emotional labor defined as “the relationships that teachers have to negotiate as they balance between how they feel in particular work situations and how they are supposed to feel according to social expectations” (De Costa et al., 2019, p. 2) In other words, teachers undertake efforts (“labor”) to learn how to control or suppress their negative emotions, as this is expected of them in their school environment. Benesch (2017, p. 12) offers another definition of emotional labor as “‘the struggle between workplace *feeling rules*’ (Hochschild, 1983) and employees’ prior training or beliefs about appropriate workplace conduct” (Benesch, 2017, p. 12).

In the cognitive view of teacher emotions, emotional labor would imply a conflict between institutional demands and personal beliefs about teaching versus a teacher’s true self. It would take a great deal of individual effort to resolve the tension by employing various emotion-regulation strategies (Bielak & Mystkowska-Wiertelak, 2020) or practicing personal resilience to inhibiting factors (Frydenberg, 2017). It can be further speculated that conducting too much emotional labor and/or doing so too often can lead to teacher burnout (Chang, 2009; Keller et al., 2014) and, consequently, disengagement from the profession, and even though this can only be mental disengagement, it hampers a smooth development of teacher identity.

As emotions appear to play a pivotal role in language teacher identity formation, experiencing positive emotions in the profession (e.g., pride) helps build affiliation to the profession. By contrast, negative emotions affect teacher vulnerability (Jackson et al., 2007; Song, 2016) and, consequently, identity. Vulnerability has two functions. On the one hand, it indicates the emotional labor the teacher does (mental exhaustion caused by hiding one’s true feelings and displaying what is organizationally desirable), at the same time placing them in isolation. On the other hand, it may provide the teacher with an insight into the realities of life, thereby initiating the transformation of their identity and influencing professional deterioration or growth (Zembylas, 2002).

One feeling that affects teacher vulnerability is the feeling of shame and/or anxiety when facing students of a higher level of language proficiency. An example of such a case is provided by Song (2016) in a situation when Korean teachers confront their inadequate language skills with those of returnee students from the study abroad period. As a way of protecting their vulnerability and securing their positions at school, Korean teachers resort to using “cover stories, in which they portray themselves as experts who comply with the school curriculum and policy through which they sustain their position” (Song, 2016, p. 636).

Teacher vulnerability can also be impacted in teacher-parent relations (Lasky, 2005). In her interview study, teachers claim to experience positive emotions, such as happiness or enjoyment, in relation to parents who conform to the teachers' institutional expectations of the parental role, for example through being responsible, supportive, and appreciative of teacher efforts. By contrast, they experience negative emotions, such as anger, frustration or disgust, if parents do not come up to the teachers' preconceived expectations. These judgements have been recognized as a struggle for power (Lasky, 2005, p. 850). Teachers enjoy the recognition of their professionalism, and yet their (verbal) behavior is embedded within the institutional norms of hierarchy and surveillance. For this reason, they may find it difficult to leave this perspective in encounters with students' parents.

The above examples also suggest that much of teacher identity construction takes place through discursive practices which are emotionally loaded. Here, emotions are not viewed "as universal, measurable, or unchanging across time and space. In fact, the focus is not so much on what emotions are as on what they do socially" (Ahmed, 2004, in Benesch, 2019, p. 114). Benesch (2019) goes on to say that poststructuralist/social-constructive approaches "theorize emotions as cultural practices, changing across time and space [...] effects of human encounters with objects, including ideas, policies, memories, other people, events, activities, places, animals, and so on" (p. 114).

Finally, it should be recognized that teachers' emotional tension can be resolved through their reflectivity, understood here as their ability and willingness to reflect, which could be regarded as a tool for teachers' professional development and identity construction (Gabryś-Barker, 2012).

## **The Project Design**

### ***Participants***

While we share very similar values when it comes to English language teaching or language teacher education, we also acknowledge that there are several aspects that differentiate us with regard to our respective identity markers. Dorota was born a decade earlier than Joanna and she comes from a small town in the north of Poland where she completed her basic education. She continued her tertiary studies and later doctorate at a major English department at Poznan University in the times of Polish communism, when a shortage of English speakers, admiration of Western values, and a common willingness to learn English prevailed. She completed her studies in the very same year that the collapse of communism was announced in Poland (1989) and, after graduation, returned to her native town to work as a state school teacher of English.

She also has a more diverse history of working in ELT as, apart from being a full-time school teacher for eight years, she also worked as a regional part-time in-service teacher educator in a state teacher development center, a part-time representative of an ELT publishing house, and a pre-service teacher educator at a local Teacher Training College. She has one adult son.

Joanna began her English studies at the Jagiellonian University of Cracow a few years after the collapse of communism in 1989, when Poland became open to Western businesses and there was a pressing need, as well as numerous career opportunities, for any person knowledgeable in foreign Western languages. For this reason, she easily and relatively early found employment first in a secondary school, where she worked for seven years as an English teacher, and almost simultaneously as a pre-service teacher educator at a local Teacher Training College. She has continued to work at the university and has been doing research for over twenty years now. She has two sons, who are currently attending upper-primary school and it is through them that she gains a wealth of insight into Polish education and current school life.

Thus, though educationally aligned, we acknowledge our differences in terms of age, geographical backgrounds in Poland, and the diversity of ELT job experience. Considered a strength in any duoethnographic project, these differences are the 'place' from which we speak that may contribute to our reconceptualizations.

### ***Research Questions***

The study was guided by one overarching research question: *What emotions emerge from our biography-based dialogues?*

We also thought that answering the main research question would help us shed light on language teacher emotions with respect to teacher identity (re)formation in the process of fulfilling our different teacher roles (our 'perspectives') and, indirectly, make us better see the necessity of supplementing the 3ALTIF with an affective component. Finally, we wished to experience duoethnography as a TESOL research method.

### ***Methodology***

As duoethnography is still a rather unfamiliar qualitative method, we feel some explanation is required for why we opted for this method in our exploration of teacher identity and emotions. The reasons were basically threefold: the inherent nature of duoethnography as a research method, which we thought

would lend itself very well to the present project, its link to emotions, which was our research topic, and the sheer novelty of the method.

Duoethnography is a method in which “people of difference conceptualize their stories through a particular phenomenon in juxtaposition with one another” (Norris & Sawyer, 2017, p. 1). We entered into our conversations as two different individuals, though educationally aligned, in order to track the experience of our ELT-related emotions. Our selves constituted the context for the analysis of our emotions, their reconceptualizations and potential meanings so as to view the emotions anew. In our dialogues we talked about our time as novice teachers, parents who were simultaneously language teachers, and our work as teacher educators. All of our stories were authentic, not hypothetical, as we provided legitimate examples of emotions experienced in playing all these roles. As the frame for investigation and the first principle of duoethnography (Sawyer & Norris, 2013) is the concept of *currere* (Pinar, 1978)—an informal curriculum of individuals’ lives—we were convinced that duoethnography would be an appropriate method for learning from each other’s biographies and critically investigating our emotions.

Another benefit of using duoethnography in investigating emotions is the very nature of emotions. Admitting to experiencing emotions (especially negative) requires sincerity, which can only be expressed in a safe environment. Obviously, there are duoethnographic projects where there are power differentials and all this may involve (see Lowe & Lawrence, 2020); however, in general, the creation of trust, respect, and a safe space for researchers is considered crucial for duoethnography. We began our project from the position of collegiality, which we found helpful in talking about emotions. Moreover, duoethnography provides the kind of nuanced perspective, that is necessary when discussing emotions, which are, on the whole, subjective in nature.

Lastly, we were attracted by the novelty of the method. Although other aspects of teacher identity have been duoethnographically researched (Banegas & Gerlach, 2021, Lowe & Kiczowski, 2016), the emotions of language teachers have, to the best of our knowledge, never been explored in this way. The openness of the method, its lack of prescriptivism, along with the gradual emergence of the data, was what we found suitable for our first contact with this method.

### ***Data Collection Methods***

In this study, we gathered data via oral and written dialogues over a period of five months. We arranged a two-hour Zoom meeting in English in December 2020 which was facilitated by our prior individual reflection with the help of the stimulus questions (Appendix). Although our discussion eventually assumed most of the direction from that originally anticipated (we did not address the

issue of emotion management at all), and we do not, in fact, offer answers to the stimulus questions appended to this paper, we have included them, as they helped to make us deliberately think and focus attention on our emotions.

During the meeting we aimed to discuss our experiences related to emotions when we were school teachers, followed by what emotional incidents we remember that were felt as parents and teacher educators, in the hope that this dialogic investigation would contribute to a reconceptualization of ourselves. We then created a conversation-based online document in which we analyzed and supplemented our discussion with new information, comments, and follow-up questions. It could be said that the joint Word document became a space in which our suggestions, understandings, and incomplete ideas were posited for further examination.

On the basis of the Zoom written data, we conducted a thematic analysis to find out what we thought the emerging emotions in our discussion were. Based on this process, we identified the emotions that emerged from the Zoom meeting: the experience of pride, joy, and anxiety when we were English teachers, an occasional experience of anger, disappointment and shame in the role of parents, and the emotions that we still experience in our work as teacher educators. In addition to the Zoom meeting, we regularly emailed each other and talked on the phone in order to further discuss the identified areas or resolve any points of disagreement. We then created another document, based on our original Zoom dialogue, in which we deconstructed and reconstructed the original duoethnographic text, a step advised by Sawyer and Norris (2013). We also incorporated the theory and professional literature that we had studied in relation to the investigated topic, which is in line with one of the central tenets of duoethnography, or working principles, of “literature as participant” (Sawyer, 2012, p. 24). According to this tenet, the literature consultation does not take place before the beginning of the study but, once the topic emerges, duoethnographers review relevant literature.

We decided to present our conversation within three themes referring to our recalled emotions from the perspectives of teacher, parent, and teacher educator, which became our “reconceptualized” retrospectives explored duoethnographically. Each section starts with a short introduction and finishes with an analysis of the preceding fragment.

### ***Data Presentation***

**Theme 1: Emotions from the perspective of novice teachers.** At the time when we worked as school teachers, we did not know each other. That was why we decided to start the duoethnographic project with our personal narra-

tives from the period when we joined the English teaching profession and our recollection of how we felt then.

**Dorota:** I can say why I stayed in the teaching profession, which may also be true about other teachers. I was a graduate, I didn't have any job experience and, suddenly, I was recognized, and accepted as a great teacher by almost all my English students of different ages, their parents and my superiors. I was a young teacher and there were no other English teachers around. I was offered a job practically in every school in my town as they all desperately wanted to have English on offer. That was some kind of power. You are recognized, powerful and treated as a fully-fledged teacher, a professional. Whatever you say related to learning or teaching English is respected. If people think highly of you thanks to what you do in the classroom, if your opinion matters, you feel appreciated. This is positive. This is what novice teachers may be looking for if we think about emotions [...] You are proud of being an English teacher and you can subscribe to this.

**Joanna:** I agree. When I think of those days now, I remember being very much engrossed in lesson preparation. [...] Lesson preparation at that time was enjoyable, maybe because I expected appreciation in reward. I could describe that state as a kind of Csikszentmihalyi's (2009) flow. My first years of teaching were really in a state of flow when I was learning how to teach and enjoying myself.

Despite the positive emotions experienced at that time, the 'downs' which adversely impacted the first years on the job were also experienced.

**Joanna:** I think, for novice teachers especially, it is quite stressful to enter a new group. In the beginning, you must establish clear power roles and rules of conduct. And it always takes a lot of energy. You don't feel like reprimanding or setting a rule and being consistent with it, but you have to bring out all the strength and somehow pursue a rule or react to any misbehavior. It cost me a lot of emotional labour, as Benesch (2017) called it, to comply with the school's demands or feeling rules, and this is what many novice teachers have to learn too, as Yuan & Lee (2016) observe.

**Dorota:** I can recall another example of anxiety that I felt when I was a beginning teacher in the 90s. That was a time when a point of reference at my university was the native speaker. During my first years of teaching, we used to have school exchanges where I had to be an interpreter. I wasn't paid, but I had to interpret in front of the whole school of teachers and students. One school exchange was with a town in the north of

England and their accent was often a problem for me. I was the only English teacher at school and situations when students could compare my English with the English of native speakers was stressful and made me anxious. Other people from school thought that since you were a teacher of English, you knew everything about English speaking countries, their literature, everyday culture. They took it for granted that you knew all the intricacies of interpreting too. That echoed my thinking from university in which the native speaker was the best model to emulate. This has changed recently, thanks to the communicative approach, the focus on the learner, translanguaging, etc. But at that time, making a mistake or not offering the answer to a student's question was failing to provide the right professional standards. We didn't have smartphones for looking up unknown words. I remember comparisons of who is a better teacher: a native speaker or a non-native speaker, just like in Medgyes's (1994) book, and my negative feelings about such comparisons.

**Joanna:** The teacher needs a lot of self-confidence and a high level of competence. I remember reading Dewaele's (2018) study where he found that a teacher's ability to regulate emotions was related to teacher competence. I believe it is very important that teachers are actually well educated. That was difficult to achieve in the past with limited access to language. Others' expectations were unrealistic with limited opportunities for learning the language from native speakers. At university methodology classes we were told that we were not "walking encyclopedias," which stuck in my mind, so I never felt ashamed if I didn't know an answer, even if students tried to put me on trial, even if they commented on something, I never took this to myself.

**Dorota:** And in my case that was a bit like a "sticky object" phenomenon to use Benesch's (2012) phrase. It is still somewhere in my head. You resent this, and you are still attached to it.

Despite the differences in our demographic backgrounds, we both had rather positive reminiscences from our novice teacher years. It was interesting to note that out of three emotions that emerged two were very positive: pride and joy. Both of us agreed that the English teacher's profession in Poland at the time we started teaching was extremely attractive. There were so few English teachers that even novice English teachers were looked up to. Our knowledge of language and teaching skills were immediately recognized by others: learners, their parents, and school superiors. Both of us were rewarded with a credit of trust, which undoubtedly made us believe how valuable we were and how useful our work was. That may have served as the basis for our self-respect,

professional security and, in a word, our pride on account of being English teachers. That may also have been why Joanna so enthusiastically prepared for her classes, as she knew her efforts would be appreciated by learners and rewarded with praises from parents and school principals.

Thus, it would seem that our initial attraction to the job, clearly helped by others' recognition and respect, must have contributed to our desire to remain in the profession for good and expand our knowledge about language teaching on a regular basis.

As the above narratives also illustrate, we identified one negative emotion, that is, anxiety. Although Joanna recalled stress related to teaching new groups, especially with respect to classroom discipline, which is a common feeling experienced by beginning teachers, Dorota focused on stress resulting from her comparisons to English native speaking teachers and rating herself less favorably in such comparisons as far as her linguistic competence was concerned. Although today, with the prevalence of English as a Lingua Franca and various models of World Englishes, the native speakerism ideology with its perceptions of non-native speakers in terms of deficit rather than difference is disputable, the fact that she remembers it so vividly may indicate that native-speakerism was really a problem to her. At Dorota's university, Noam Chomsky's (1957; 1963) books pointing to native speakers as points of reference were frequently quoted by professors. It is little wonder, then, that non-native speakers of English often felt an inferiority complex while speaking English in the company of native speakers. For Dorota, that "sticky object" phenomenon (Benesch, 2012) was particularly acute and anxiety producing when she had to interpret in front of others, especially her learners for whom she aspired to be a language teacher role-model. Having said that, it is worth noting that Joanna's experience in this matter differs. She studied several years later, after the publication of Phillipson's (1992) seminal book exposing linguistic imperialism, which may account for her attempt to rationalize this issue with no feelings of inferiority or language deficits on her part.

**Theme 2: Emotions from the perspective of parents.** Teacher educators perform different roles in their professional and private lives. Most of them also act as parents. The following excerpts show what kind of emotions we experienced as parents.

**Joanna:** I don't visit the lessons, but I can gather from the conversations with my kids what the lessons look like and what I get is that the teachers hardly ever speak English, or if they do, just the instructions, and they only follow course books. I really wonder why this happens. I just can't understand that because it would be boring for me as a teacher to have identical lessons for so many years.

That's why I started thinking of emotions [...] Is it because teachers are tired, stressed, burnt out and protect themselves by doing the teaching mechanically, the bare minimum, from cover to cover? Is it because this helps them conduct the lesson without emotional engagement? Some kind of fun activity, talking to students, playing games, singing songs... This never happened with my children who have been at school for seven, nine years. I found that what we teach at university doesn't seem to materialize in practice.

**Dorota:** That's unlike the case of my friend who teaches French. She says she has to think about everything from the beginning to the end because she doesn't have much support from publishers. Perhaps English teachers are lazy or deskilled, because of the availability of ready-made materials, as Richards (1998) warned. If they have something ready, they think, why not use it? I just wonder because I don't believe they are all so... as you said, burnt out, right?

**Joanna:** Maybe there's no place for creativity now because a lot of students tell me that there's so much emphasis on the results of school leaving exams. Teachers feel that they have to do all this cramming for tests, and have to focus on exam preparation techniques all the time.

**Dorota:** What counts are the outcomes, exams, leagues. What has become of education? The consequence of exams is school ranking. If teacher quality is measured only by the effectiveness of exam results, then teachers direct all their efforts towards this goal, at the same time minimizing their efforts in other areas, such as creative lesson planning or materials design.

In this exchange, Joanna, as a teacher educator and simultaneously a parent, discloses the kind of emotions she experienced when she re-entered school in the role of parent. Her first reaction was surprise, and then disappointment with school practice, for many of the methodological guidelines that have been taught to pre-service teachers for years are actually not practiced in schools. This concerns the general lack of communicative methodology, overuse of Polish and overreliance on ready-made teaching materials. She observed little teacher creativity and individualization in lessons design, which is likely to act against learners' abilities and needs and, consequently, against their engagement and motivation (Dörnyei, 2020). As Joanna tries to reflect on the issue more deeply and identify the reasons for this, she hypothesizes that one problem could be teachers' emotional exhaustion and burnout.

Dorota does not agree with this interpretation and tries to find her own justification for this situation. In her view, English language teachers' lack

of creativity in material and test design may have been caused by neoliberal pressures. The widespread availability of materials concerns English, the most widely-used global language, and, as Dorota observes, may not relate so much to teaching other languages, as the example of a French teacher shows. This observation is in accord with Block et al. (2012) who point out that the global ELT coursebook industry is a sign of neoliberal forces pervading education. It could even be hypothesized that creativity has been sustained among teachers of those languages which do not have a global reach. Clearly, the popularity of teaching English has led to its homogenization in terms of methodological practice. By the same token, many individuals who may not have felt a particular vocation for teaching have found the occupation easy to perform thanks to the rich supply of ready-made ELT materials. In contrast, teachers of less popular languages, with poorer access to teaching materials in comparison to English teachers, may prove more creative and therefore more passionate about their work, as they invest more in their work in order to motivate students to learn their languages with fewer ready-made teaching resources available.

Further, Joanna agrees with Joanna that the social context has changed since they themselves worked at school and that all teaching nowadays, including one in a foreign language, is subjugated to external high-stakes examinations. This has been identified as another cause of the lack of creativity, as well as lack of enthusiasm, which Joanna finds contagious. Joanna extrapolates on this issue, blaming neoliberal thinking about education for this state of affairs (“What counts are the outcomes, exams, leagues”).

The relationship of the teacher educator as parent and teacher has one more dimension. It can produce a slight feeling of shame in relation to their children. This may happen if the child does not come up to the high expectations of parents who are teacher educators, particularly if the child’s English teachers are former trainees of their parents. A feeling of unfulfilled expectations can be sensed by both parties, that is, by the teacher in reference to the child whose parent was their trainer, and by the teacher educator parent in reference to the child, as well as his teacher.

**Dorota:** You were this kind of teacher, a reliable one, everybody looked up to what you said, to what you did in your methodology class, and my son [...] a complex that he wasn’t good enough. I just felt that was connected with the position of teacher educators in the power hierarchy, or some individual perfectionist inclinations. Or perhaps I just wanted to be trustworthy in the sense that what I do at university should also work with my own child.

**Joanna:** And that’s why I didn’t want to contact the language teachers of my sons. I have to say my son is not the best student of English, unfor-

unately, although I think he could be. I find the teacher unsupportive in terms of emotions and motivation. My son would need more appreciation and encouragement and he doesn't get it. He has a good grade, but with my help. I know he doesn't like English and it's because of the teacher. I don't feel like going to the teacher because what could I tell her? That I'm actually unhappy about how she teaches my son?

**Dorota:** Just one incident that I can recall [...] I told my son when he was in the third grade that you could write 'cannot' as one word in English. And he told this to the teacher who always wrote it separately. After a few days, she told him off in the presence of his friends, almost shouting that he was wrong because people write 'cannot' separately in American English and, what was really strange, that he shouldn't have said such things to the teacher if he didn't know for sure. I think she over-reacted. She must have felt insecure. He was just a child and she must have taken his comment too seriously. I didn't want to contact her personally. What could I have said? "You are not prepared?". On another occasion, she lowered his grade explaining that his grammar was too poor. Should I have gone to her and said "You can't demand so much grammar when you are teaching a child." She could have answered, "I'm a teacher now. And besides, you taught me methodology." And that's quite disconcerting because we should be proud of working as teacher educators. But when we are not recognized by practicing teachers, again, coming back to recognition, it is upsetting. Perhaps they are afraid of us.

Parental feelings of shame may lead to the avoidance of confrontation with the child's teacher, confrontation which may become a struggle for power or an attempt to prove both teachers' and teacher educators' positions as (more?) legitimate professionals. Both parties appear to be vulnerable to criticism that could undermine their expertise and, perhaps, their position in the hierarchy of educational institutions. Having left the training institution, a school teacher is already independent of the teacher educator, and would like to treat the teacher educator parent just like any other parent, which is from the position of an expert, an expectation found by Song (2016) and Lasky (2005). By contrast, the teacher educator considers herself a knowledgeable expert, and does not want to fit in the shoes of an ordinary parent. The school teacher, in turn, does not want to recognize the parent's expertise as this might undermine her status as a competent professional. This is the place where the interests of both parties come into conflict. The teacher educator does not want to admit to the "educational failure" of her own child. Conversely, school teachers may expect that the teacher educator practices with the child at home what is taught at school so that the child would be able to prove his competence. The pupil, in turn, appears

to accumulate the expectations of the parent that he should do well at school and, simultaneously, of the teacher, who expects the educator's child to be a model learner. The child, therefore, is in the middle of a conflictual situation for proving 'better' methodological expertise. Similar positioning practices taking place through discourse have been observed in various sociocultural contexts (e.g., Pavlenko & Lantolf, 2000) and professional situations (Werbińska, 2020).

The excerpt above reveals teacher vulnerability and insecurity about their language competence. This sensitivity to criticism may be rooted in the still highly-valued native-speaker model. The teachers who were linguistically educated in an instructional setting and have little first-hand experience of living abroad or acquiring language through everyday contacts may feel inferior when confronted with more skilled experts, like the teachers found in Song (2016). It requires a great deal of self-esteem and self-confidence to renegotiate teacher roles and at times admit to incompetence in certain areas.

**Theme 3: Emotions from the perspective of teacher educator.** Both of us are enthusiastic and devoted teachers, and the feeling of mission is what probably led us to undertake the position of teacher educator. Having served this role for over 20 years now, our viewpoint on teacher education has also undergone modifications, which is visible in the excerpts below.

**Joanna:** I began my teacher training career four years after I started teaching at school. Naturally, I was apprehensive of my students' reactions, especially as they were often a few years older than me, and had come back to university to be retrained to become English teachers. I realized they had more life experience. Fortunately, I had background knowledge in communicative language teaching which was a novelty then. Also doing microteaching tasks followed by reflection was enjoyable for students. I also continued to work at school. The school experiences fed back onto my credibility as a teacher educator as I was able to provide first-hand examples of classroom situations instantly.

**Dorota:** During my studies the communicative teaching was not much emphasized. The obligatory course book during my methodology classes was H. D. Brown's (1987) "Practice in Language Learning and Teaching" which we had to know almost by heart. Unfortunately, I copied the same model in my beginning methodology classes, and students didn't learn many practical things. What helped me most with developing my teaching methodology was the Western methodological help with lots of teacher access to books from the British Council, Peace Corps—all providing invaluable help. I often used their offer, given the fact that I worked at college and at a local in-service teacher training centre.

Both Joanna and Dorota began teacher training in the 1990s, which was both a challenge and an opportunity for professional development. Assuming a new role always brings out anxiety, which in our becoming teacher educators turned out to be facilitative. We drew on the available resources which gave us confidence and advantage over our trainees: being language teachers in school, which allowed us to provide authentic examples from school practice, thorough theoretical background, the knowledge of innovative methodology transferred to Polish university courses by Western organizations. With hindsight, it seems clear that we were also emotionally engaged, willing to learn language teaching, and enthusiastic, which might have resulted from the fact that we were pioneers in preparing English teachers for their future jobs. The aspect of novelty seems to play a key role in capturing our own interest (as teacher trainers) and that of our trainees who were becoming acquainted with ELT communicative trends for the first time.

**Dorota:** With years to come and next generations of students, I observed less enjoyment or engagement on their part. I continued to teach in a similar way through introducing activating techniques and micro-teaching followed by reflection, but I observed it required from me more energy and nonverbal techniques to attract their attention. I started wondering what the reasons were: was it because the techniques were no longer a novelty, since the students had already been exposed to communicative methodology in their own English language learning? New technologies, the introduction of new apps, etc. seemed to strike their interest at first, but I found it harder to make them think more deeply about their use, go beyond mere operation of the IT tools, to make them think what would work in class and under what conditions [...]. They were not interested in that once all the fun of using ICT stopped.

**Joanna:** Some of the students are passive, that's true, but they often come to study teaching for other reasons than wanting to become teachers. What I noticed is that they want to be entertained. This is a pity. A lot of them hold a belief that an enjoyable activity is always learning-rich. But it's often not the case. You may have a good time and learn very little. [...] What I don't like is the emphasis on all that is practical: apps, ready-made games, things to take and use in the classroom. They make students less interested in creating things by themselves or designing their own lessons. They'd rather download an activity recommended as interesting than create their own. Our Zeitgeist? The Internet?

But I can't say I'm myself bored. Paradoxically, I find it puzzling. Investigating a particular case seems interesting to me, which doesn't mean

that I manage to make all students interested in my class. But I manage to keep myself interested in my course. Is this a strategy of combating teacher burnout?

In the continuation of this part of our duoethnographic study, some disillusionment can be detected. The observation that old tricks no longer work, that the times and teacher candidates have changed seem to testify to this. The difficulty in applying in-depth critical teaching or lesser interest in the teaching profession and the general social context can be clearly witnessed. The neoliberal economy seeping into education encourages teacher trainees, like other language learners, to consume attractive products, imitate enjoyable techniques, download teaching solutions in the name of accountability. The fact that teacher trainees, though full-time students, now have to work to cover the costs of their studies also changes the perspective of their teaching mission. Joanna finds the trainees' decreased interest and engagement less rewarding, as their passivity rubs off on her. Alternatively, it may also be an initial sign of emotional exhaustion, one of three symptoms of teacher trainer's burnout (Maslach & Leiter, 2006), as Dorota hints. Dorota "manages" to keep herself interested in the course, which may also signal her own self-direction and autonomy. Both of them find the situation puzzling and duoethnographic reflection on it may stand for their effort to better understand the reasons behind the trainees' passivity.

## Discussion

This duoethnographic project has focused mainly on our own emotions experienced from the positions of school teachers, parents, and language educators. We were curious to find out what emotions would emerge in our reminiscences of these roles, how they affect our teacher identity which, in a way, matches our question whether "affect" should be added to the constituents of the otherwise quite capacious 3ALTIF model. Finally, we wanted to know whether the method of duoethnography would be useful for this ELT project.

To answer our main research question, we identified several emotions emerging in the different stages of our professional careers and in relation to other people. We recalled pride, joy, and anxiety while working as novice teachers, shame and disappointment when engaged in the role of parents, and reduced motivation, but also puzzlement, in training future candidates for the teaching profession. We found that our emotions were socially-constructed, and their character (be it positive or negative) enhanced (our roles as school

teachers) or weakened (Joanna's disillusionment with some of her students) our motivation to work. Another finding that emerged through our discussion was that strong emotions were long remembered after the experience (Benesh's (2012) "sticky object" phenomenon), and can be regarded as influential to the formation of teacher identity.

This uncovering also brings us to the answer of how emotions affect teacher identity. In our study, we realized that assuming new challenging roles in favorable social situations (our roles as novice teachers), generated positive emotions, such as pride and enjoyment and, therefore, strengthened our affiliation to the profession, to use the term of the first 3ALTIF's constituents. Anxiety also appeared in confrontation with new challenges, such as teaching a new group or the necessity of school public interpreting in the context of the native speaker/non-native speaker dichotomy; yet, with time, it proved facilitative, as it prompted us to work on minimizing those negative emotions by thorough preparation for lessons or reflecting and developing a critical perspective on the concept of native-speakerism. Therefore, it could be concluded that particularly in the early stages of a teacher's career, it is important to cater for the well-being of teachers, which could be done by watchful mentoring (Smith, 2018) and general support from positive institutions (Budzińska, 2018), with a view to strengthening the teacher's affiliation to teaching. Catering for wellbeing is also important for teachers at later stages of their career. Nevertheless, being more experienced (and hopefully more autonomous), teachers may require less institutional support, as they have developed coping strategies for themselves through reflexivity and the constructive search of for solutions to problems encountered. This is the goal of many recent publications (Gabryś-Barker & Gałajda, 2016; Gkonou et al., 2020; Mercer & Gregersen, 2020) promoting positive psychology in language learning and teaching. Self-awareness, reflectivity, agency, and resilience to adverse situations are all tenets of an autonomous teacher, demonstrated in the 3ALTIF model (Werbińska, 2017a).

More negative emotions started to appear as we gained more experience, and perhaps greater awareness of teaching complexities and their connection with the socio-educational context. These emotions appeared in relation to other people, such as teachers of our children, when we performed both the roles of parents and teacher educators. The feelings of disappointment and shame emerged as an outcome of our struggle for power (Benesh, 2018, 2019) in contexts where there is a struggle for the recognition of one another's expertise, as positioning theory posits (Davies & Harré, 2001). As our study showed, there is tension in the relationship between our children's teachers and ourselves as parents who also happen to be language and teaching experts. There is effort on the part of the teacher to be recognized as a legitimate teacher and an expert, which is difficult in confrontation with a superior language and/or methodology expert. This inferior position may cause anger, while the person in the superior

position feels equally angry and disappointed that not all expectations have been met. Perhaps the language educator, not working at school any longer, has an idealistic image of a teacher's everyday job. Perhaps she herself, having read and researched on the subject of language teaching is actually more knowledgeable and finds it hard to put up with the deficiencies of others. Scholarly work does require perfectionism and attention to detail from which her high expectations of competency may derive.

Our duoethnographic conversations also revealed that it is not emotions themselves that are important, but what we do about them, as Gkonou et al., (2020) point out. The confrontation of our expectations with the realities of teaching led us to strive to find the reasons for the appearance of emotions. To great extent, they were triggered by the changing educational contexts that are marked by neoliberal trends. This sociopolitical setting in which many teachers now have to work, has had devastating effects, as indicated in another duoethnographic study by Hayler (2020), who pointed to its being responsible for teachers' emotional tension. Recognized as a threat to the agency of many teachers, this unfavorable climate has not spared us as teacher educators.

In our case, however, we observed that emotions have positively affected reflectivity, agency and self-criticality, as our reflection on our emotional experience has led us to questions, thus constituting a link between reflection and agency. The positive emotions that we experienced mainly in the beginnings of our career as teachers and teacher trainers have generally had an effect on making us learn more, pursue our interests, develop our careers as researchers, and, at the same time, better understand our learners and their needs. Nevertheless, it should be acknowledged that we had a chance to begin our career in times when teacher professionalism was associated with higher levels of agency, autonomy and creativity, whereas for the last two decades, at least in Poland, it has been linked with accountability and efficiency demonstrated in high-stakes testing.

Constructing teacher identity, more important than merely acquiring professional knowledge and skills, is a dynamic lifelong experience and a story of becoming. Emotions are an invisible element impacting teacher identity, as they contribute to the growth of reflectivity, agency and resilience—all attributes of an autonomous teacher—noted in the 3ALTIF model. For us, and perhaps many other teachers, an incentive to becoming an English teacher was this striving for recognition, authority, and power. These are more difficult to maintain in today's world where language can be learnt in various informal settings, while language knowledge is no longer limited to what can be learnt from a school teacher.

Looking back on our teaching careers we have also learnt something about ourselves. Through examining the distinctive features of two persons from three different perspectives we can better witness how emotions may contribute

to our identity (re)formation. The sometimes divergent positive and negative emotions that emerged and that have accompanied us as teachers, parents, and teacher educators prove that language teacher educators also reveal that language teacher educators, though educationally aligned, need not constitute an identical group of people. The examples of experiences that we have recalled exhibit commonalities but they also differ. This may show the complexity of teacher identity as well as the diversity of ways in which we understand ourselves and other ELT professionals. This awareness may also serve us as an important insight into our professional becoming and our teacher identity (re)negotiation and (re)consideration. We can better understand other teachers, our students who are future teachers and, above all, ourselves and who we are as language teachers and who we have become.

Our goal was also to experience duoethnography as a method of inquiry. We assumed it would help us share our autobiographic narratives, untangle the emotions that would emerge from them and make a deeper sense of the dialogues. With hindsight, we do acknowledge that thanks to this method, relatively new to both of us, our lived experiences from the past were given a new voice. As duoethnography relies on approaching dialogues through a selected lens so as to recognize the variability in the duoethnographers' experiences, the investigation and interpretation of teacher emotions (our selected lens in the study) was made possible. The confrontation of what we once felt with what we think now allowed us to gain a better understanding of emotions that each of us experienced while playing the roles investigated in this project. Therefore, we hope that this article may contribute to highlighting the power of duoethnography as a theoretical approach that can shed light on teacher emotions in identity research.

## Final Thoughts

Experiencing emotions leads to reflection on their causality as well as learning or (re)constructing knowledge about the realities of teaching. For this reason, experiencing emotions might feed back into teacher training as well as feed forward to their possible aftermaths.

The venture we embarked on with this small project started with a view to enriching the 3ALTIF model with a fourth A that stands for *Affect*, which, as a work yet in progress has only been suggested in the present paper. From the analysis of our duoethnographic narratives, this goal seems justified. Teachers and teacher educators are constantly faced with situations where there is a conflict between the expectations of their institutions (i.e., feeling rules) on

the one hand, and their beliefs and professional desires, on the other. These tensions generate emotional labor, which might affect their teacher identity once they solve the following dilemma: to be autonomous and reflective or rather obey the high and rather contradictory demands placed on them by educational contexts.

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## **Die Identität und Emotionen der Sprachlehrer in duoethnografischem Diskurs: Perspektiven von Lehrern, Eltern und Lehrerausbildern**

### **Zusammenfassung**

Das Aufbauen von Lehreridentität anstelle des Erlernens, wie man Fähigkeiten und Subsysteme beibringt, gilt seit einiger Zeit als Priorität in der Ausbildung zukünftiger Lehrkräfte. Bisher wurden mehrere Modelle der Lehreridentität vorgeschlagen, darunter das 3ALTIF-Modell (3 A Language Teacher Identity Framework) (Werbińska, 2017a), in dem die Lehreridentität aus *Affiliation* (Wille der Lehrer zu unterrichten), *Attachment* (Überzeugungen der Lehrer in Bezug auf das Unterrichten) und *Autonomy* (Handlungsfähigkeit, Reflexivität und Belastbarkeit der Lehrer) besteht. Rückblickend scheint es, dass das 3ALTIF-Modell, welches auf anderen Identitätsmodellen gründet, die zum Zeitpunkt seiner Entstehung vorhanden waren, die affektive Komponente der Identität von Sprachlehrern nicht explizit genug berücksichtigt und daher die Besonderheit des Berufs nicht ganzheitlich erfassen kann. Aus diesem Grund will man die Frage der Emotionen eingehender untersuchen und einen duoethnografischen Diskurs durchführen, um die „fehlende“ Komponente des 3ALTIF-Modells zu analysieren und möglicherweise zu ergänzen. Die Duoethnografie wurde aufgrund ihrer Innovation, Eignung für die Untersuchung von Identitätsfragen sowie Fähigkeit, das Selbst zu klären und auszudrücken, als qualitative Forschungsmethode gewählt. Die geführten duoethnografischen Dialoge konzentrierten sich auf unsere eigenen Emotionen aus dreierlei Sicht: ehemaliger Fremdsprachenlehrer in der Schule, Fremdsprachenlehrer als Eltern und Fremdsprachenlehrer, die wir waren. Die Ergebnisse zeigen unsere Wahrnehmung von Emotionen, die uns einst beeinflusst haben, und legen nahe, dass Emotionen nicht nur psychologische Konstrukte sind, sondern auch eine soziale Dimension haben.

*Schlüsselwörter:* Identität des Sprachlehrers, Emotionen, Duoethnografie, Lehrerdiskurs

## **Stimulus questions**

1. What role do emotions play in language teaching?
2. What emotions are important in maintaining teachers' affiliation to their job?
3. What professional situations seem to provoke most serious emotions?
4. Which emotions help/inhibit teachers to remain in teaching?
5. What do you understand by 'emotional management'?



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## Language Teacher Identity Outside the State-School Context

### Abstract

The importance of understanding language teacher identity is well-established in the existent literature. It has been shown to impact upon many aspects of teachers' lives both inside and outside the classroom, such as wellbeing (Day & Kington, 2008) and self-efficacy (Canrinus, Helms-Lorenz, Beijaard, Buitink, & Hofman, 2012). The nature of language teacher identity is broadly categorised from a socio-cultural perspective, as dynamic rather than static, as negotiated in social interaction and (potentially) a source of struggle (Barkhuizen, 2017) or friction (Beijaard, Meijer, & Verloop, 2004). As this struggle with identity comes to the fore during periods of transition, when identity is seen to be challenged, the focus of research has largely been trained on pre-service or early-service teachers (Mercer & Kostoulas, 2018). The research in this paper addresses a teaching population who have thus far escaped the research gaze, but aspects of whose identity could be problematic and possible sites of struggle. Drawing upon a narrative approach, in case-study form, I examine how two established teachers (with four years or more service) who have been trained to work in the state-school context and who, for a variety of reasons are now working outside it, construct their language teacher identities. The findings point to the importance of the teachers' own experiences as learners in their identity formation, and how emotion accompanies and acts as a driver of identity change as they seek stability and status on an uncertain professional path.

*Keywords:* Language teacher identity, identity struggle, established teachers, state-school context, private context

There is a growing recognition of the need to understand language teacher identity, as how teachers perceive themselves and their teaching has been linked to an array of factors which impact significantly on their lives both inside and outside the classroom. These factors range widely, from issues such as teacher wellbeing (Day & Kington, 2008) to long-term engagement and motivation (Hiver & Dornyei, 2015).

Identity is generally categorised as dynamic, negotiated and, when challenged, open to shifts, which may be potentially painful (Clarke, 2008; Sheridan, 2013). It is the pre-service and induction phase of teachers' careers that has been the focus of much existing identity research (Mercer & Kostoulas, 2018). More experienced teachers, understood as teachers of four years' service or more, as this is the period in which teachers are seen to process their professional practices (see, for example, Huberman, 1989), have to some extent escaped such intense research scrutiny. Yet, it is clear that they also experience identity shifts and what Barkhuizen (2017) labels as "struggle." Identity may be challenged by a redrawing in working practices or priorities, often at the level of curriculum reform (e.g., Ketelaar, Beijaard, Boshuizen, & Den Brok, 2012), or by a change in context, either through moving to another area or field of teaching (Tao & Goa, 2018) or through teaching in another country or culture (Leigh, 2019; Takeda, 2017).

Through narrative inquiry, the case study presented in this paper hopes to shed light on the identity construction of teachers who have escaped research attention thus far. They are experienced teachers (working for more than the four years of the early years phase), employed outside the context for which they were trained, that is, working in the private rather than the public sector.

The teacher training the two participants in this study have undergone focused on the primary and high school context (reflected in course curriculum and content and teaching practice). However, they have worked mostly in the private sector, having set up their own businesses, offering private tuition to a variety of age-ranges. This study seeks to understand what implications, if any, this change from public to private sector has had for their language teacher identity—given that these teachers have entered a context for which they were not specifically trained, and may not have expected to work in, through circumstance rather than choice. The private sector carries a number of specific challenges for language teachers, yet despite the extensive number of teachers who are engaged in private language education, little research has focused on their psychology (Mercer, 2020). The main question I therefore attempt to address in this paper is how trained state school teachers construct their teaching identities when teaching in a non-state context and what implications this has, if any, for teacher training and development.

## Literature Review

### Understanding of Identity

The understanding of identity that underpins the present study is rooted in a socio-cultural framework, similar to the conceptualizations offered by authors such as Beijaard et al. (2004), Sachs (2005), Rodgers and Scott (2008), and Barkhuizen (2017), who categorize identity formation as a complex interplay of individual and society. I consider the identity of my participants as intricately constructed and reshaped through the people and experiences they have encountered along their professional paths. I draw upon notions of both personal and professional (language teacher) identity, understanding that the two are deeply entwined.

Identity should be understood as a shifting rather than fixed entity that it is continually negotiated, with some authors pointing to the never-ending nature of identity development (Barkhuizen, 2017; Cooper & Olson, 1996; Gee, 2000). Also critical is that identity formation is neither a passive nor neutral process. Beijaard et al. (2004) highlight the role played by agency in driving the construction and reconstruction processes of identity development, while Zembylas (2003) reminds us that identity is felt, with emotion accompanying the construction of our identity through mediation and interaction with others, our perceptions of them and in turn theirs of us (Johnson, 2003).

Identity formation can also potentially be a site of struggle. Tsui (2007) points to the multiple identities an individual maintains, echoed by Barkhuizen (2017) who describes the negotiation of sub-identities as perhaps harmonious but also “contested and resisted” (Barkhuizen, 2017, p. 4). Just as identity is renegotiated through time, it may also be renegotiated through space, context included (Gee, 2000), the influence of which on identity formation is nuanced by social, cultural, political, and historical factors (Rodgers & Scott, 2008). This understanding of identity underpinning the present study, as a constantly shifting and at times painful process, driven by agency and mediated by others, allows me to capture most fully the complexity of the participants’ identity as they have negotiated their professional path.

### The Importance of Identity

While definitions of identity vary, there is strong consensus in the literature on the importance of understanding language teacher identity. The impact of identity on teachers and their teaching is undeniable, with Leibowitz (2017) pointing to the role identity plays in how teachers perform their professional ac-

tivities in the classroom, claiming that it “[...] informs everything he or she does [...]” (Leibowitz, 2017, p. 75). Identity has also been linked to teacher wellbeing (Day & Kington, 2008), which has in turn been linked to learner wellbeing and improved learning (Dresel & Hall, 2013; Mercer & Kostoulas, 2018); other studies point to identity as playing a vital role in teacher effectiveness (Alsup, 2006) self-efficacy, job satisfaction, and commitment (Canrinus, Helms-Lorenz, Beijaard, Buitink, & Hofman, 2012), and also in long-term engagement and motivation (Hiver & Dornyei, 2015).

At every stage of the teacher’s career, in learning and development, critical engagement with professional identity is vital (Beijaard & Meijer, 2017; Day & Kington, 2008; Olsen, 2008; Rodgers & Scott, 2008). While it has been argued that critical reflective practice be instilled at the pre-service stage (Korthagen, 2004), other studies have pointed to the need for in-service teachers to also engage in identity work, to question their beliefs about themselves, their learners and their practices, in order to direct their professional development and learning (Bucholtz & Hall, 2005; Korthagen, 2004). This may suggest that the participants in this study, a population as yet not systematically addressed in the literature, could also benefit from such identity work to support them on their professional path.

### **State-School Trained Teachers in the Private Sector**

Identity transition in more experienced teachers has been addressed in the existent literature largely in terms of changes within context. Shifts in identity have been triggered by new demands placed on teachers in the form of working practices or priorities (e.g., implementing educational innovation in vocational education (Ketelaar et al., 2012). In language teaching specifically, the literature has dealt with English teachers moving between fields of language teaching, entering ESP, for example (Tao & Goa, 2018). Moving between contexts has also been addressed in terms of identity construction and shifts, yet largely from a cultural perspective, focusing on the identity (re)negotiation, for example, of foreign English language teachers in the Chinese educational context (Leigh, 2019) and in the Japanese education system (Takeda, 2017).

What has yet to be addressed in the literature is context from the perspective of trained state school teachers working in the private sector. As the participants in this study have entered a context for which they have not been specifically trained, or indeed expected to work in, it may be that they also experience the friction (Beijaard, 2019) that can occur when expectation meets professional reality. These challenges to identity may be intensified due to the specific demands of private sector teaching as outlined in the existent literature: the working conditions themselves, which for many verge on the

precarious (Mercer, Oberdorfer, & Saleem, 2016; Sun, 2010; Wickham, 2015; Wieczorek, 2016), or the nature of private sector teaching, in which teachers may find themselves responding to the needs of a profit-driven business (Skinner, Leavey, & Rothi, 2019). The perceptions of private language teaching may also be problematic, as this profession enjoys a lower status than others (Johnston, 1997), while in the classroom, teachers in this context may be less respected by students (Bowen, 2013).

As language teacher identity is linked to many aspects of a teaching professional's life, both inside and outside the classroom, throughout their career, it is vital that we begin the process of unravelling the language teacher identity of the teachers addressed in this study. If their identity is indeed a site of struggle as a result of working in the private context, understanding how they construct their language teaching identity, and identifying any specific needs they may have in regard to managing their identity, will hopefully allow us to establish how best to support them in their English teaching careers.

### **Narrative Inquiry**

This case study employs narrative inquiry to explore the language teacher identity of the participants. The narrative inquiry method recognizes the centrality of the story in identity formation, reflecting the notion of identity as rooted in the "stories to live by" (Connelly & Clandinin, 1999, p. 4). While what we say about ourselves expresses our identity, the telling of the narrative offers the potential to reshape it (Beijaard et al., 2004), a process which takes place through stories over time (Rodgers & Scott, 2008). In our attempts to make meaning of the experiences we have lived, we interpret them as part of a continuum, rather than isolated events (Carr, 1986). Our stories are subject to constant reinterpretation, and imposing coherence on them can be a source of struggle (Day, 2006).

The use of narrative in this study is two-fold, taking what could be described as a holistic approach to the study of identity (Leigh, 2019). I have employed it both as methodological tool to gather data and an analytic tool to make sense of it. I approach the stories told by the participants about their professional trajectory as English language teachers not as a fixed reality, but, drawing upon the work of Ricoeur (1991), as presentations of the participants' self-understanding. In this way, their stories can be understood as not just descriptive but somehow selective (Crossley, 2000). These narratives serve as devices which allow me to explore how they have constructed their identity, through the recounting of the meaning-making experiences, figures and events on their professional path. Through careful analysis of these stories, I hope

to bring to light, as Bell (2002) suggests, the assumptions and insights that underlie them.

Given that the question under research is both highly complex and personal, I hope that presenting the data in a narrative case study form has allowed me to reflect the intricacies or “rich detail” of the participants’ identity construction (Duff, 2014, p. 234), while capturing something of their voices as they have reflected upon it. While it is the participant’s narrative I present, I have to some extent co-constructed it with them, as the researcher is inevitably cast in the co-constructor role with this approach (Clandinin & Connelly, 1998). Drawing upon the work of Stake (2006), the use of two participants in the study has enabled me to consider both the individualities and commonalities of the participants’ identity.

## **Methodological Design**

### **Research Question**

Through the narrative inquiry approach described above, the study attempts to answer the following research: how do state-school trained English language teachers construct their language teacher (professional) identities when teaching outside the state context?

### **Procedure**

The sampling procedure was tailored to the population described above: trained state-school English language teachers working outside the state context. As this is a relatively specific teaching population, I looked first to former students who are part of my personal and professional circle on social media. The fact that I was in some way familiar with this group meant that I was able to locate potential participants, and also, importantly, understand the complexity and nuance of their experiences. From the potential participants, the two who were first approached (through private messages (Messenger)) on Facebook, agreed to participate. Initial messages asked the potential participants to confirm that they were suitable for the study (i.e., that they had been trained to work in the state context but had had largely been working outside of it). Follow-up messages briefly outlined the nature of the study, indicating that I was exploring English language teacher identity. Mindful of this relationship (as their former university professor), I was at pains to point out that they were under

no obligation whatsoever to take part in the research and that they were able to withdraw at any time. I felt, however, that knowing the participants, a positive rapport had been established, which would facilitate a more honest and open interaction during the interview process. I am mindful of the limitations of this sampling procedure, as I have had access only to those participants who were contactable via social media and only those who were willing to discuss their identity with me. However, it is this special relationship that has allowed me an insight into their personal experiences and ensured the inclusion of participants in the study who fit the profile of the population I wished to understand.

Ethical procedures were followed throughout the data generation. The participants were fully informed of the aims and method of the research, in writing and orally. They were assured of confidentiality (that they would be assigned pseudonyms and also any identifying information would be redacted). Prior to being interviewed, both participants were sent a consent form to sign to indicate their agreement. Before the interview began, I checked the participant's willingness to participate once more and asked if there were any questions we should address before beginning. I also reminded the participants that they did not have to answer any questions they were uncomfortable with during the course of the interview. It was emphasized to the participants that they were free to withdraw from the procedure at any point up until the point of publication and if they chose to do so, all data would be immediately destroyed.

## Context and Participants

The participants, referred to by their pseudonyms, Andreja and Borut, are both English language teaching graduates. They studied at the same faculty at approximately the same time, although they graduated some years apart (there is a certain degree of flexibility in the Slovene system as to when a student can complete the obligations required for their study program). Both students were enrolled in the pre-Bologna era, when studies were four years, with the teacher training element taking place in the last two years of study. Unlike now, under the Bologna 3+2 system, all students enrolled at the English department graduated as teachers.

Andreja has worked as an English language teacher for 15 or 16 years and has been mostly self-employed during that period. She has set up her own business, providing private tuition to both young and adult learners, while she has also worked on contract with young learners in a private language school. She has spent a brief period (two months) in a state primary school, providing sick-leave cover.

Borut has been teaching for a shorter period, six to seven years, and has also through that period been mostly self-employed. He has also spent some

time in a state primary school (six months) also providing sick-leave cover. His teaching has consisted mostly of private tuition with primary-level learners and teaching adults on contract in a language school setting. Borut has combined teaching with a job entirely unrelated to education.

**Table 1***Participants' Biographical Data*

Participant	Gender	Age	No. of years teaching	Type of teaching
Andreja	Female	40	15–16	Self-employed: private tuition; young learners and adults State school sick-leave cover (two months)
Borut	Male	40	6–7	Self-employed: part-time private tuition, combined with other job State school sick-leave cover (six months)

**Research Instruments**

The data for the case-study were collected through in-depth semi-structured interviews (Cohen et al., 2000). This particular format was selected as it gives both an element of structure and flexibility, allowing the interviewer to respond to points of interest as and when they arise. At the same time, the data generated by this format ensures a certain degree of comparability, whilst allowing the participants to retain their uniqueness and individuality (Kvale & Brinkman, 2009). The interviews were based on an interview protocol, designed to capture the participants' trajectory in terms of their identity, based on questions establishing their professional paths from English learners to students and then in their transition to teachers. The questions probed their initial and ongoing motivations, critical events and figures, their relationships with learners and other teachers. Both of the interviews were conducted in English and lasted approximately one and a half hours. The interviews were transcribed verbatim. During transcription, any identifying information such as real names and places were removed or changed to protect the participants' identities. All the interviews were also transcribed for content, including anything, such as pauses or laughter, which contributed to the meaning of the data. The audio files were deleted immediately following transcription. The transcription generated a data corpus for these two teachers of 30,594 words.

## **Analysis**

To analyze the data, a Grounded Theory approach as proposed by Charmaz (2006) was adopted. The data were first transcribed, and I familiarized myself with the data by listening to it first, reading over it in paper form and making provisional notes before any formal coding took place. The interviews were then coded using a bottom-up approach, with the aim of allowing the data to speak for themselves, keeping a focus on emergent themes. Throughout the coding procedure, I attempted to remain reflexive at all times in an effort to manage my own subjectivities, consulting with my colleague during my analysis. I used ATLAS.ti to code the data, keeping memos during the multiple waves of coding, until I felt that “code saturation” had been reached. The interviews were coded first separately, and then compared in order to detect what was common to both participants and what was unique to them. In this way, I was able to identify any commonality across the data sets in terms of the main themes, yet also establish in what ways, if any, those main themes differed in the participants’ experiences.

## **Results**

The results of the case study are presented in the form of individual narratives for each of the participants, while commonalities are reflected upon in the discussion section.

### **Andreja: Transcendent Stability**

According to Andreja, she has always wanted to teach. She remembers that when playing with her sister in early childhood, she always adopted the role of teacher. She has also wanted to be connected to English and working with the language somehow. As a learner of English, Andreja felt she was extremely competent, and presented a challenge to her teacher, whom she feels was lacking proficiency in English. Andreja’s high-school English teacher was a meaningful figure for her. Andreja was not only critical of her language proficiency but also of her classroom approach and methods:

Her knowledge of English wasn’t good; she didn’t prepare for lessons. Her lessons were boring; she was reading out the coursebook.

This resulted in a crisis for Andreja. She felt personally aggrieved—hurt—by the effect her teachers’ approach had on her attitude to a language she loves. So, in her own teaching, Andreja strives to avoid the method and approaches to which she was subjected as a learner. For her, it is important to prioritize the needs of the students in terms of individualizing the approaches she adopts, requiring exhaustive preparation on her part:

To me, the first thing is always, who am I teaching? That is the first, so what is my student like? That’s the first thing. When I plan my lesson, what is my student like, where do their interests lie? What is their personality-wise like, where are their problem areas? How can I reach this student? But, that’s the basis.

Tied to her focus on preparation, she feels strongly that one of her roles as the teacher is to ensure that her learners remain motivated and are always exposed to useful and relevant language. During her high-school experience, she encountered a teacher who pulled her back from her crisis, a role-model in which she roots her own language teacher identity:

It’s crazy, and that’s also one part, that I’ve always sworn to myself, it was like something I said to myself back then: I want to be the teacher to make the kids feel the way that they made me feel.

In this class, the teacher approached the learners as equals and shared an open and relaxed relationship with them. This has in turn informed Andreja’s own classroom practice. She too embraces the notion of equality, which underpins the relationship she has with her learners, which she claims is more effective than being a disciplinarian or aloof.

Andreja perceives herself as a competent teacher, whose approach to teaching, founded on the beliefs and values shaped by her learning experience and expressed in the methods and approaches she employs, can be employed both in the state and private context. During the period she spent teaching in a state primary school, she was able to resist the challenges to “her way” in the form of parental expectations, and the demands of the curriculum and paperwork. When her method was questioned by a fellow teacher during her state-school experience, who said that she did not train to be a teacher to “clown around” (her characterisation of Andreja’s methods), she rejects the criticism. Andreja says the way you teach depends on your personality and she is prepared to try any method to achieve results. She looks to the positive affirmations she has received of her teaching throughout her career:

I do believe that what I'm doing, I'm doing right [...] and I've had so many feedbacks in the past years that I absolutely don't [...] it may sound a bit self-assured but I really don't doubt it [...].

Andreja is largely critical of her teaching colleagues. She looks past her local community of teachers, aligning herself to the Finnish system of teacher education, which is more demanding to enter and complete, she feels. Other teachers often appear to her as unmotivated, stuck in their teaching ways, sometimes lacking proficiency in English.

Andreja has encountered few, if any, problems with her teaching. Teaching is something that she feels has always come easily to her. She is proud of her ability to find ways to tackle any issues that arise and her self-reliance in drawing upon the extensive bank of material resources she has created. Her perception of herself as a teacher is that of a natural. Her competence as a teacher rests on the fact that she can make a "connection with kids," which is "a gift she was given." Teaching nourishes her; her classes are her "soulfood" and teaching her "superpower." Learners open up to her and share their problems in English. She feels rewarded by the work she has done with socially-disadvantaged groups, which sustains her.

As Andreja looks to the future, she considers that a state school position might be preferable for the job security it provides. Andreja also views this not only as an opportunity for her teaching methods to reach the widest possible audience in terms of learners, but there is also the added motivation that in the state-school context, she would be able to encourage her teaching colleagues to adopt her methods in their classrooms:

[...] but I still have this maybe sort of idealistic idea that I could show other teachers that it is doable.

### **Borut: Painful Change**

Borut perceived himself as a lazy learner. During high school, he was taught English by a teacher who was marked by a deep personal trauma. She shouted at students and trained them simply for exam knowledge. He feels that by the time he reached university, he was far behind his peers in language competence.

He ties becoming a teacher with academic performance. As a student, he was unsure of his career path, feeling that he was pushed somehow into studying; he believed at first that he would be unable to teach, as he was unable to meet the academic demands of the study program. With the help of a fellow

student, however, he began to improve, although he was still unsure he would ever teach, and it was only after the completion of his studies that he saw himself as becoming a teacher. This experience, though, gave him a sense of teaching purpose:

[...] I didn't have [...] there's lots of kids that don't know how to study or so, I think this is my way of sort of giving some things back.

Helping learners to study will be part of keeping them engaged, which he believes to be the core, or "shell" of teaching.

During a period when he was unable to find employment, Borut missed teaching, and felt "bitter" that he had wasted time and energy on training to be a teacher. Borut is currently teaching English to business people. He perceives himself to be an effective teacher in the private context. He sees his learners as making progress and his boss, who is taking an English class with him, tells him he is a good teacher. Otherwise, Borut engages little with the wider community of teachers, having little contact with those employed at the same language school, or those employed in state schools.

Although he feels that his studies were helpful, he has had to educate himself for the teaching he is doing now. It is through experience that he has learned how to manage the specific demands of teaching adults:

[...] you have to do things yourself, so this would be an interesting part you know as well if you think about the studies. It's very different to teach adults. You have to know what you're doing because people expect more of you.

He is extremely conscious of his learners' needs, identifying the ways in which they differ to the children he was trained to teach. He recognizes how their earlier learning experiences affect them, with school often having made them extremely self-conscious. He is motivated by his feeling of helping them:

And they're very afraid to speak English in front of others, their colleagues or boss and you know making these things easier for them [...] sort of [...] it's okay, it's a bit of rewarding.

Borut has had to adjust his approach to teaching adults, especially when working in business settings. He has learned to accept that business people will use their phones during class, and that they will resist homework. He tries to make as few unnecessary demands on his learners as possible, remaining as unobtrusive as he can. He perceives that English for many of them plays a minimal role in their lives, or is even a burden. When asked what his learners think of him as a teacher, he claims that he is sure they hardly think of him at all.

At the same time, he also recognizes the new role he has to fulfill, that of being a service-provider and the learner a customer. Being self-employed means he has to engage with accountants and worry about finances. As Borut reflects on his experiences, he feels that teaching adults is more demanding than children, but more manageable for him.

Borut spent some time in a primary school, providing sick-leave cover. Drafted in just after the holiday period, Borut found that he could not keep up with the pace of preparation, nor manage the discipline issues he faced with a learner who undermined his authority and who controlled the class through “manipulative behavior.” He was stressed, which led to losing his cool and shouting at the pupils, which reminded him of his high-school teacher. Feeling underprepared, he allowed the children to watch cartoons. He was expected to assess the learners, yet he felt out of his depth and could not admit this to his colleagues. Asking for help was out of the question, as he “should know” how to set exams. He could not prepare adequately for class, as he had a young son at home. He is still troubled by this period of teaching. It still “gnaws” at him.

This episode, he says, made him realize he is not cut out to teach in a state school. He says he is too old, too weighed down by domestic demands. He cannot engage with the learners in state school in the meaningful ways he does with his adult learners. Yet, as he looks to the future, he recognizes the pain of expectation from the early years of his career when he hoped to teach in a state school but was employed in his other job instead:

[...] then I really kind of got a bit bitter I think because it took me a long time to maybe find myself after high school, which was hell, and the first years here were hell. I spent so much time and energy and then sort of to be doing something that I could have done without those things.

As Borut considers his future, he sees that although to a certain degree he feels that he has established himself in the private school context, finding a number of clients and figuring out how to meet their demands, there is still a sense of unfinished business in the public sector. He acknowledges that his future most likely lies outside the state context, yet somehow he is unable, or unwilling, to say for certain that his future lies where he is now. The thread running through his narrative of uncertainty and painful change is very much present. Despite the bruising episode from primary school, and his statement that he has somehow missed his chance of a state school position, the idea that he will not return there is difficult for him to accept:

I will probably not teach in school, and this is something that I’ve been struggling for, for a year now.

## Discussion

This study hoped to shed light on the ways in which English language teachers trained to work in the state context and working outside it construct their language teacher identities. Despite the stark contrast in the individuality of the data sets, there are also common themes which emerge for both. The discussion addresses the three main themes from across the data: the role of past language learning experience and teacher selves, the need for status and the role of emotion in identity formation.

### Teacher Selves

What features strongly in both of the narratives is that the participants make sense of themselves professionally through conceptions of teaching and teachers shaped by their own experience as learners. Both participants seem to have, during their learner years, built a strong core of beliefs through which they measure their teaching. Drawing upon possible selves theory (Hamman Gosselin, Romano, & Bunuan, 2010; Kubanyiova, 2009), these can be understood as “ought to” beliefs, while key figures from the participants’ learning experiences provide a model of both the “ideal teacher self” and the “feared teacher self.” In Andreja’s case, she perceives herself as close to the “ideal teacher self.” She sees herself as able to teach exactly as she would like to, according to her concept of an ideal teacher, in any context she would choose to work in. In contrast, Borut’s enactment of his “feared self” in his public sector experience has led him not to question his beliefs about teaching per se but to instead shift context where he can enact his preferred teaching identity.

One way to perhaps understand this finding is to consider the teaching selves of the participants in this study, shaped in part by their own language learning experience, as offering a sense of stability to our participants in their identity construction. This reflects the findings of Day, Kington, Stobart, and Sammons (2006), who suggest that teachers are pushed into “finding ways” to establish and maintain stability in their professional lives.

It could be argued that Andreja and Borut have encountered particular instability on their professional trajectory. They have worked in both the state and private context, managing their own expectations and the expectations of others at the institutions at which they have been employed. They have settled in the private sector, a context for which they have not been specifically trained and in which they have experienced a degree of financial insecurity due to being self-employed, yet they both also acknowledge that they may return to the public sector. While their path may be categorized as unstable, what has

remained stable is Andreja and Borut's core teaching values, as expressed by their teacher selves. As with other teaching professionals, when they teach close to their preferred teaching selves, as they perceive they do in the private sector (and Andreja in the public sector also), this fosters a sense of efficacy, which in turn leads to a more stable, and stronger, language teacher identity (Thomas & Beauchamp, 2011).

Although both of the participants, as described above, perceive themselves as achieving a degree of professional efficacy in the private sector, both refer to returning to state school, at least for the financial security it would bring, despite reporting challenges from their state school experience, with Borut's "praxis shock" (Kelchtermans & Ballet, 2002) and Andreja's discomfort with colleagues. What may have been beneficial to both in the past, and what may still prove beneficial, they should decide to return, is engaging in some form of identity work.

Other researchers, such as Beijaard (2019) and Alsup (2006), have called for identity work to be incorporated at the pre-service stage. Smagorinsky, Cook, Moore, Jackson, and Fry (2004) suggest identity-challenging activities during teacher training in order to mitigate "praxis shock," while the use of autobiographical stories (Le Fevre, 2011) or metaphors (Thomas & Beauchamp, 2011) may lead to pre-service teachers reflecting more profoundly on their identities. Freese (2006) suggests that such practices may reveal inconsistencies between students' beliefs and practice, allowing them to find counter-examples to beliefs, which is crucial in identity development. At this stage in their careers, Andreja and Borut could benefit from identity work which would be useful in helping them develop an understanding of the cognitive aspect of their identity, that is, the beliefs they have formed about themselves as teachers and their teaching, allowing them hopefully to maintain professional efficacy without compromising their core teaching values (Bucholtz & Hall, 2005; Korthagen, 2004).

## **The Role of Status**

Besides this apparent need for stability, the data may also point to a need for status among members of this teaching population. This may be particularly reflected in Andreja's narrative, in her perception of her teaching as problem-free, and the anchoring of her identity in rather esoteric or perhaps spiritual concepts, for example, referring to her teaching as abilities or a "gift," contrasting with the generally negative descriptions of her teaching peers in the state sector. However, there are echoes of the need for status elsewhere in both participants' narratives. While, as Mercer points out, the reasons for engaging in private sector teaching are "often more pragmatic than an intrinsic calling to education" (Mercer, 2020, p. 4), Andreja and Borut frame employment in

the public sector as the pragmatic choice, as something they would only leave their private sector work for—in which they enjoy a relative degree of freedom and meaningful relationships with the learners—to guarantee a regular income and a degree of job security. This is hardly surprising, as Borut's financial concerns reflect the worrying levels of precarity reported by language teachers employed in the private sector (Walsh, 2019). His inability to commit fully to the private sector illustrates precisely something Walsh refers to when he describes private sector teachers employed in circumstances “in which the ability to plan a coherent future is compromised” (Walsh, 2019, p. 1).

In order to understand this finding, we can look to social comparison theory, which draws upon the work of Festinger (1954). Both participants, to varying degrees, seem to be engaging in downward social comparison in order to bolster their language teacher identity. This response may well have been triggered by both participants entering this sector through circumstance rather than choice and as a result, feeling the need to justify their professional path. This downward social comparison may also be triggered by the negative perceptions of the context in which they are employed, which the participants here may have absorbed, offering a strategy with which to counter the lower perceptions of EFL private teaching (Fiske, 2011) and its business-oriented nature (Skinner et al., 2019). Engaging in such comparisons may be beneficial in terms of ensuring job satisfaction and affective commitment (Brown, Ferris, Heller, & Keeping, 2007), which may in turn help to enhance their language teacher identity.

While the perceptions of this sector as a whole can only be challenged through systemic and fundamental change, one step which could be taken is the incorporating, or even acknowledging, of private sector teaching during teacher training. This could perhaps not simply take the form of training pre-service teachers in the specific skills and approaches they need for the type of teaching they are engaged in but also perhaps include training in the business aspect of this work. At present, in some institutions in Slovenia, where the case study was carried out, the focus is placed almost entirely on the public context. Perhaps recognizing private sector teaching at the pre-service stage would go at least some small way towards bolstering its legitimacy as a career and rendering the need for such social comparison strategies redundant.

## **The Role of Emotion in Teacher Identity**

Another significant theme in the narratives is the role of emotion in the participant's identity construction. While emotion connects the data sets, the role it plays varies. In Andreja's data, we see emotion as a quality (Hamman et al., 2010) reflected in her striving to make an emotional connection with her learners. In Borut's narrative, we witness emotion as a response (Hamman et al.,

2010), accompanying challenges to his identity, but also motivating a change in teaching context. The emotion expressed in both these narratives, while different in nature, seems triggered largely by the striving for self-efficacy, in how the participants teach best and in which context they teach best.

What is clear from the data is that Borut has carried a pronounced emotional burden on his career path, brought about by employment uncertainty, unemployment, and the identity challenges of moving context. This becomes potentially problematic when considering his teacher agency. Emotion offers the potential for self-transformation in identity construction (Zembylas, 2003). Yet, when professional legitimacy is called into question—as in the ways described above—the emotional consequences can profoundly negatively affect agency (Golombek & Johnson, 2005). If Borut is any way illustrative of other teachers who have shared similar experiences, we may find that they also are “paralysed” and unable to pursue career possibilities or avenues that would otherwise be open to them.

The link between emotion, identity, and agency has already been clearly established by authors such as Day (2012) and Reis (2015), while elsewhere in the literature, calls are being made for teachers to be supported in understanding their “affective selves” (Goh, 2015). Verity (2000) points out the need for the affective aspects of teacher identity to be reflected upon and professionals trained in what Wu, Liang, and Csepelyi refer to as “affective management” (2020, p. 13). While it may remain as yet unclear how to best support them in doing so, the data in this study suggests that it would also be beneficial for the participants to understand the affective element of their identity in order to effectively manage their professional paths.

## Conclusion

The study sought to shed light on the identity construction of an until now overlooked language teacher population, namely, that of trained state-school teachers working in the private sector. Although this was a small-scale study carried out in Slovenia, its findings may be of relevance for other teachers following a similar career path elsewhere. It draws attention to the specific challenges of working in the private sector, a sector which the participants in the study entered through circumstance rather than choice and were not specifically trained for, and the subsequent problems and challenges this poses for their identity construction.

The participants in this case study tread an uncertain path in a sector which is often underappreciated in comparison to its public counterpart. This has

triggered a need for both stability and a quest to bolster their sense of status when constructing their identity. The case study has also drawn attention to the heavy emotional toll identity challenges exacted on one of the participants, which negatively affected agency and directly impacted on their teaching career.

However, it is hoped that acknowledging private sector teaching during the pre-service stage and implementing some of the suggestions made regarding identity work could be constructive in supporting these teachers in their professional trajectories.

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Kirsten Hempkin

## Die Identität der Sprachlehrer außerhalb des staatlichen Schulwesens

### Zusammenfassung

Die Bedeutung des Verständnisses von Identität der Sprachlehrer ist in der vorhandenen Literatur gut belegt. Es wurde nachgewiesen, dass diese sich auf mehrere Aspekte des beruflichen und außerberuflichen Lebens der Lehrkräfte auswirkt, z.B. auf das Wohlbefinden (Day & Kington, 2008) und die Selbstwirksamkeit (Canrinus, Helms-Lorenz, Beijaard, Buitink, & Hofman, 2012). Die Identität der Sprachlehrer wird aus soziokultureller Sicht eher als dynamisch und nicht als statisch betrachtet, als im Rahmen sozialer Interaktion ausgearbeitet, und stellt (potenziell) eine Quelle des Ringens (Barkhuizen, 2017) bzw. des Streitens (Beijaard, Meijer, & Verloop, 2004) dar. Da das Ringen mit der Identität in Zeiten des Übergangs, wenn die Identität in Frage gestellt wird, in den Vordergrund rückt, hat sich die Forschung hauptsächlich auf angehende Lehrkräfte konzentriert (Mercer & Kostoulas, 2018). Der Artikel befasst sich mit einer Lehrergruppe, die bisher noch nicht erforscht worden ist, deren Identität jedoch problematisch und ein möglicher Gegenstand des Ringens sein könnte. Auf der Grundlage eines narrativen Ansatzes wird in Form einer Fallstudie untersucht, wie zwei erfahrene Lehrkräfte (mit vier bzw. mehreren Jahren Berufserfahrung), welche für den Dienst im staatlichen Schulwesen ausgebildet wurden und nun aus verschiedenen Gründen außerhalb dieses Umfelds arbeiten, ihre Identität als Sprachlehrer aufbauen. Die Ergebnisse zeigen, wie wichtig die eigenen Erfahrungen der Lehrer als Lerner für ihre Identitätsentwicklung

sind bzw. wie Emotionen ihren Identitätswandel begleiten und vorantreiben, während sie auf einem unsicheren beruflichen Weg nach Stabilität und Status suchen.

*Schlüsselwörter:* Identität der Sprachlehrer, Ringen um Identität, erfahrene Lehrkräfte, staatliches Schulwesen, privates Schulwesen



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## **Language Teacher Wellbeing in the Private School Context: A Case Study**

### **Abstract**

Language teacher wellbeing in the private education sector has almost been completely neglected in research. This study examines a well-functioning institution in the private sector and analyzes the systemic and contextual factors that contribute to the flourishing of its teachers. The case study explores the wellbeing of English language instructors by means of open questionnaires, in-depth semi-structured interviews, and participant observation. The findings reveal a number of facets contributing to positive teacher wellbeing at the systemic, institutional level, such as corporate culture, policies, organization, management, opportunities for professional growth, and social life, as well as adequate resources, and good physical working conditions. Most good practice emerging from the research is universal and can be implemented by language institutions in all contexts. However, some variables that affect language teacher wellbeing at this workplace are specific to the nature of the institution and, therefore, could not be put into practice elsewhere.

*Keywords:* private sector, positive psychology, teachers, wellbeing, positive institutions, language education

Teacher wellbeing is essential for an educators' ability to cope with the everyday extensive emotional labor which is an integral part of their profession (Mercer & Gregersen, 2020). Additionally, it is linked with student wellbeing, outcomes, and achievement (Mercer & Gregersen, 2020; Dewaele & Proietti Ergün, 2021). Language teacher wellbeing is worth even more consideration due to the additional stressors inherent in foreign or second language instruction (Mercer, 2020b; Piechurska-Kuciel, 2011). Yet, this aspect of education has not been researched sufficiently. Furthermore, except for Mercer's (2020b) and Budzińska's (2021) studies, there is no research on the wellbeing of language educators working in the private sector despite the fact that this sector plays

a crucial role in foreign language education globally, particularly in learning English as a foreign language.

Recently Babic et al. (2022) examined factors supporting teacher wellbeing in relation to the workplace. With the exception of their study, existing research into language teacher wellbeing focuses mainly on negative aspects, that is, an absence of wellbeing. Since wellbeing lies at the center of positive psychology, whose focus is on flourishing, the purpose of this paper is to explore contented rather than stressed educators and look for sources of happiness in their workplace. The present qualitative case study investigates instructor wellbeing at a language institution in the private sector and how it is promoted at the institutional level. This is in line with the collective approach according to which wellbeing is a shared responsibility of the individual and the institution in which they are inserted (Mercer & Gregersen, 2020).

## Literature Review

### Positive Psychology and Its Focus on the Positive

Positive Psychology (PP), defined as “the scientific study of what goes right in life” (Peterson, 2006, p. 4) is a new branch of psychology created by Seligman and Csikszentmihalyi (2000). It focuses on the positive aspects of human experience, unlike traditional psychology, which concentrates on the negative, such as mental illnesses or disorders and their treatment. PP looks at human wellbeing and explores how people can function to the best of their potential (Malczewska-Webb, 2016, p. 194). Its goal is to study factors that promote a good life, successful relationships, and engaging institutions (MacIntyre, 2021).

There are three pillars of PP: positive emotions, positive individual characteristics, and positive institutions, also labeled enabling institutions. The third, least well-studied pillar has been defined as “organizational structures that enable success and promote positive language learning environments” (MacIntyre & Mercer, 2014, p. 165). As Gabryś-Barker (2016) observed, positive institutions are concerned not just with grades and graduation rates, but with the affective growth and wellbeing of both students and educators. She highlighted that:

Studying school as an enabling institution becomes one of important dimensions of present day research, especially with the advent of positive psychology in a language learning and teaching context. (Gabryś-Barker, 2016, p. 156)

Positive institutions have been the least well-studied out of the three PP pillars. As MacIntyre and Mercer (2014) pointed out, “in SLA research, greater care is now being taken to describe the contexts in which learning occurs, especially at the classroom level” (p. 165). Therefore, scholars have called for more studies of positive or enabling institutions.

## Teacher Wellbeing

Wellbeing is defined from the hedonic perspective as “gaining pleasure and avoiding pain with the aim to maximize happiness” (Mercer, 2020b, p. 2). From the eudemonic point of view, on the other hand, wellbeing is related to finding a sense of meaning in life, a chance to grow and develop. It is reflected in PERMA, Seligman’s (2011) model of flourishing which stands for Positive emotion, Engagement, positive interpersonal Relationships, Meaning, and Accomplishment.

Teacher wellbeing has been gaining attention over the last few years and its importance has been highlighted by many scholars. As Mercer (2020b) points out, “teacher wellbeing is desirable for teachers themselves as well as for their learners” (p. 2). First of all, teacher wellbeing is “central to their ability to teach to their full potential” (MacIntyre et al., 2019, p. 26), and to “perceive themselves as better teachers” (Dewaele & Proietti Ergün, 2021, p. 3). When educators are in good mental and physical health, they find it easier to manage the daily challenges of language teaching (Mercer & Gregersen, 2020; Dewaele & Proietti Ergün, 2021) and they have better relationships with both colleagues and learners (Mercer, 2020a). Additionally, “happy and healthy teachers are much more likely to blossom in all aspects of their lives, including relationships in work and beyond” (Mercer & Gregersen, 2020, p. 2). This means there is also less risk of burnout (Dewaele & Proietti Ergün, 2021) and teachers quitting the profession (Mercer & Gregersen, 2020). Teachers whose wellbeing is at a high level are more motivated, feel more positive about their institution and students (Dewaele & Proietti Ergün, 2021), and experience fewer discipline issues (Jin et al., 2021; Mercer, 2020b). According to Fredrickson’s (2013) broaden-and-build theory, when teachers are in a positive state, their minds broaden, which allows them to think more creatively and thus, become more effective and innovative.

Furthermore, since teacher and student wellbeing are two sides of the same coin (Roffey, 2012) teacher wellbeing positively affects student wellbeing and is linked to study effects (Jin et al., 2021; Mercer & Gregersen, 2020). Moskowitz and Dewaele's (2021) research on the influence of teacher wellbeing on student feelings and attitudes has demonstrated that "teachers who emanate happiness and clearly enjoy teaching strengthen their students' motivation and attitudes toward the FL" (cited in Dewaele & Proietti Ergün, 2021, p. 9).

## Teacher Stressors

So far, teacher stressors have been much better researched than sources of instructor wellbeing. Typical sources of educators' stress include excessive workload (Barbieri et al., 2019; MacIntyre et al., 2019; Talbot & Mercer, 2018), long hours (MacIntyre et al., 2019), poor relationships with colleagues, lack of suitable resources, constant changes within the profession (Barbieri et al., 2019), inadequate salaries (Barbieri et al., 2019; MacIntyre et al., 2019), poor physical environment (Babic et al., 2022; Guglielmi et al. 2012; Mercer, 2020b), organizational conditions of schools context (Fiorilli et al., 2015), being evaluated by others, lack of support (Kyriacou, 2001), conflict with students' parents, blurry boundaries between work and home (MacIntyre et al., 2019), discipline, lack of student motivation (Wieczorek, 2016), and authoritarian management style (Babic et al., 2022).

Apart from the stressors that may affect all teachers, the research has identified some specific foreign or second language teacher stressors, such as heterogeneous groups, lack of equipment and teaching aids (Wieczorek, 2016), high intercultural demands (Mercer et al., 2016), low linguistic self-efficacy (L2 teachers) (Horwitz, 1996), lack of explicit linguistic knowledge (L1 teachers) (Dewaele & Proietti Ergün, 2021) extensive emotional labor (Gkonou & Miller, 2017), energy-intense methodologies promoting communication (Borg, 2006), unstable working conditions, for example, lack of job security (Talbot & Mercer, 2018), low prestige, scheduling, being called on to cover, lack of technology, the rigidity of following a set coursebook, and seasonal work (in summer schools) (Mercer, 2020b). As Piechurska-Kuciel (2011, p. 219) has speculated, "the demands a FL teacher has to face in their work greatly exceed obligations of a teacher of any other subject, which may constitute a significant cause of more pronounced burnout levels."

Additionally, recent research suggests that stressors experienced by private school FL teachers may be particularly acute since they tend to be exploited by greedy owners, usually work on zero hours contracts, and yet must meet high student expectations as paying customers. As Mercer (2020b, p. 4) states:

The reason this group is especially important to understand is that they often have very little practical, structural or union-type support. Their working conditions are often very intense, with a high turnover of students and limited perspectives for promotion, professional development, or job security. Their status as educators and professionals is often more precarious than for those working in the state sector and they are typically employed without any medical care, paid sick leave, holiday leave, or pension provision.

## Sources of Teacher Wellbeing

Teacher wellbeing has been demonstrated to be enhanced by opportunities for Continuing Professional Development (CPD), the availability of educational resources (Barbieri et al., 2019), positive social relations with administrators, parents, and colleagues (Butt & Retallick, 2002), teacher identification with the school's values (Skaalvik & Skaalvik, 2011), a supportive school climate (Babic et al., 2022; Day et al., 2007), motivated colleagues, good rapport with managers and students, autonomy, involvement in decision-making, physical space, and a sense of purpose and meaning of one's work stemming from students' progress and achievements (Babic et al., 2022).

Mercer, who (2000b) investigated a private school context of English language teaching in Malta, found that a positive school environment and work climate may be sources of instructor happiness. Teachers were positively affected by good relationships with their colleagues who were willing to share materials and help one another in teaching preparations. Additionally, hard-working, fair, and respectful bosses, described as role models, who set a good example, were appreciated by staff members. Instructors found it particularly helpful when their boss had an understanding attitude to scheduling and allowed them to teach their preferred groups of students. Teachers also drew positivity from autonomy and involvement in the decision-making process. They valued continuous professional development (CPD) activities but believed that they should be paid for by their employer.

Teacher-student relationships and student progress and enjoyment also turned out to be salient sources of teacher wellbeing, which was in line with Mercer and Gregersen's (2020) statement that happy students are usually more rewarding and motivating to teach. As far as physical aspects were concerned, instructors were generally happier in small set-ups, promoting a sense of belonging.

## **The Dominance of the Negative in Language Teacher Wellbeing (LTWB) Research**

Language teacher psychology and language teacher wellbeing, in particular, has only recently become the subject of empirical research (Babic et al., 2022; Gregersen et al. 2021; MacIntyre et al., 2019; Mercer, 2020b; Dewaele & Proietti Ergün, 2021). These few studies have mostly focused on the negative aspects of teacher wellbeing, mainly teacher stressors (MacIntyre et al., 2019; Mercer, 2020b). Wellbeing sources have to this point been understudied (Budzińska, 2018, 2021; Mercer, 2020b; Dewaele & Proietti Ergün, 2021). LTWB has so far been researched by Babic et al. (2022), Mercer (2020b), and marginally by Budzińska (2018, 2021). At present, it appears that there is no published empirical case study of an institution investigating its effect on LTWB. Mercer (2020b) has called for research in this area, adding that “any examination of teacher wellbeing must also look at organizational variables, the quality of social relationships, especially with school leaders, and the various forms of social capital that teachers can potentially draw on” (p. 4). Additionally, the third positive psychology pillar, positive institutions, has been neglected in research with only scarce exceptions (Babic et al., 2022; Budzińska, 2018, 2021). Nevertheless, MacIntyre (2021, p. 6) have recently stated:

It would be a significant contribution if positive psychology could help articulate and evaluate the principles to help establish policy that has an impact on classrooms to facilitate the flourishing of both students and teachers alike.

The present study aims to fill the gap in research by focusing on the presence, rather than the absence of wellbeing, which is in line with the positive psychology philosophy. It is the first case study investigating language institutions in the private sector through the lens of instructor wellbeing.

### **The Status of ELT Teachers in the Polish Context**

It is not possible to understand a Polish English language teaching institution without looking at the historical situation and its effect on the status of English language and English language teachers in Poland. Until the fall of communism in 1989, Poland was under the influence of the Soviet regime, which meant that Russian was an obligatory foreign language in every school. Other languages were also taught, but usually, the courses were less intensive

and started in high school. The English language was associated with the dream of the Western world depicted in American movies. There were not many English teachers in those days, but those who were graduates of that niche, prestigious faculty of English, were also associated with that dream and therefore highly respected. Even though English language is widely taught these days and teacher status is not as high as it used to be, an English teacher's job is still considered a respectable profession unlike in the UK, where the status of language teachers is very low (Meiritsch et al., 2021).

### **Private Language Schools in Poland**

The study was conducted at a private language school of English in Poland where languages are generally taught in two types of contexts: state schools and private language schools. The private sector complements state schools and plays a vital role in language education. Classes at state schools are obligatory and free and usually take place in the morning, while private school lessons are usually taught in the afternoon and are paid for. Many learners study a foreign language in both contexts. They are often sent by their parents to attend private language school classes in addition to their state school lessons to increase their hours of language learning. Private language tuition is also popular because of the general belief that its quality is higher than state school tuition, which partly results from student and parent expectations as paying customers. Another group of learners are adults who studied a foreign language at state schools in the past and who want to refresh or expand their knowledge. There is also a small group of customers who studied one language in state schools and are learning another one from scratch.

Although private schools do not usually offer permanent contracts with paid sick leave, holiday leave, medical care, or pension provision, this is not an issue for many Polish teachers who are employed full time at state institutions and work part-time in the private sector on zero hours contracts to earn extra money. The hourly rate at private schools tends to be higher than at state schools, which has attracted another group of teachers to work freelance for them and pay their own medical or pension contributions. Although the school researched in the present paper runs on a for-profit basis and belongs to the private sector, it is owned by a state university, which makes the set-up somewhat different from a typical private language school.

## Methodology

This study seeks to explore factors contributing to the wellbeing of language teachers working for a school in the private sector. In order to do this, the following research questions were posed:

- Research question 1: Does the school promote teacher wellbeing?
- Research question 2: Which aspects of the institution contribute to the language teacher wellbeing?
- Research question 3: What aspects of the institution contribute to teacher stress?

### Participants

All of the school's fifteen instructors and the director of studies participated in this study. Twelve were Polish nationals, three were British. Their average age was 48. There were ten females and five males. Four of the teachers were full-time employees. Eleven were part-timers, working for other institutions as well. On average the teachers had worked for the school for 20 years. Their overall average period of language teaching experience was 24 years. The director of studies was also a teacher at the institution and participated in the study as a manager and an instructor.

### Research Instruments and Procedure

Data were gathered through two open-ended questionnaires, Zoom interviews with the teachers and the director of studies, and participant observation. Questionnaires were chosen as the best means of maximizing responses as they could be completed at the instructors' convenience. In addition, they guaranteed anonymity, increasing the likelihood of honest responses. The first questionnaire (see Appendix A) consisted of a biodata section and an open-ended question. Its purpose was to find out whether the school was a positive workplace from the instructors' point of view, and what contributed to its positivity or negativity. The author sent an email to teachers informing them about the purpose of the study, what they were expected to do, and how data will be used and stored. They were assured anonymity and explained that their names would be changed to protect their confidentiality. The teachers were requested to read and sign the consent sheet attached to the email. The participants were asked to complete the first questionnaire and put it in a specially designated box in their staff room. All teachers completed the questionnaires, however, three

of them gave yes/no answers without providing any justification. One of them explained that they were too busy for open-ended questionnaires.

The second questionnaire was designed to gather more details on the data obtained by the first questionnaire (see Appendix B). It was posted online using Google Forms. The link was emailed to all teachers together with a request to take part. All teachers responded to the second questionnaire, however, some of them gave very short answers.

The questionnaires were followed by Zoom interviews with four teachers who accepted an invitation (see questions in Appendix C). The interviews were organized to find out more details about the school's corporate culture, history and organization, and their influence on the instructors' wellbeing. Teachers proved eager to contribute and got very engaged constructively in the conversations, which lasted 140 minutes in total. Even though only four instructors volunteered to be interviewed, the author feels that the data are representative of the team because they are consistent with the findings obtained through questionnaires and with the general attitude of teachers that the author observed as a participant. The fact that only four participants responded to the invitation is attributed to constraints on the instructors' time.

After the interviews with the teachers had taken place, the director of studies was asked for a Zoom interview. Since the study was examining institutional, systemic variables affecting the wellbeing of staff, the author felt the research could not be complete without considering the manager who is largely responsible for the policies and organization of the workplace and, consequently, the staff's job satisfaction. The director agreed to participate, and the meeting was arranged. The one-shot interview followed an interview protocol, the questions were grouped into three main sections: the institution's policy promoting teacher wellbeing, teacher welfare, the manager's attitude toward teacher wellbeing, and her involvement in the school's social life. The interview (see questions in Appendix D) lasted 29 minutes. Both teachers and the director of studies consented to the Zoom meetings being recorded. The total data corpus was 19,210 words.

The author had worked for this school as a teacher for twenty years, hence she had been a member of the population she studied. Therefore, to complement other qualitative instruments, she implemented participant observation. In this type of method, "a researcher takes part in the daily activities, rituals, interactions, and events of a group of people as one of the means of learning the explicit and tacit aspects of their life routines and their culture" (DeWalt & DeWalt, 2001, p. 1). Insider research carries several benefits. As Trowler (2011) states, "you have better access both to naturalistic data and to respondents; you are better able to produce 'emic' accounts (ones meaningful to actors), especially using an ethnographic approach; you are better able to use natural-

istic data, critical discourse analysis and phenomenography, because you are ‘culturally literate’” (p. 2).

Being familiar with the context enabled the author to better understand the participant responses, and analyze and interpret the data. As Dwyer & Buckle (2009) point out, “This insider role status frequently allows researchers more rapid and more complete acceptance by their participants. Therefore, participants are typically more open with researchers so that there may be a greater depth to the data gathered” (p. 58). Since being a member of the group under investigation may influence the research in a negative way, the author had to stay detached and be constantly aware of her own personal biases and perspectives. The fact that the researcher did not work for the institution anymore when the study was conducted helped the author to stay neutral. It also increased the likelihood of receiving sincere answers to interview questions.

## **Analysis**

The interviews transcribed by means of Otter.ai and narratives from open-ended questionnaires were manually coded and analyzed by the author and an external researcher. To analyze the data, a grounded theory approach was taken (Charmaz, 2006). As Charmaz (2006) explains, the approach allows systematic but flexible data analysis to formulate theories “grounded in the data themselves” (p. 181). The author and her colleague read the narratives separately looking for themes or categories, which in this study were institutional sources of teacher wellbeing. Once all of the categories were identified, the two researchers went over the transcripts and narratives again, assigning units of analysis to categories. After reviewing and coding the transcripts, the themes were compared by the two researchers. Any inconsistencies regarding interpretation and categorization were discussed and resolved.

## **Findings**

### **Research Question 1: Does the School Promote Teacher Wellbeing?**

All fifteen teachers state in unanimity that the school is a positive workplace promoting their wellbeing, which is further supported by the fact that the staff turnover is very low, and the average employment period is of 20 years (see Participants section). As Tobiasz highlighted, “Once you work there, you want to work there and continue working there for many years.”

## **Research Question 2: Which Aspects of the Institution Contribute to the Language Teacher Wellbeing?**

The results addressing the second research question are presented under headings representing the main themes which emerged from the analysis. The findings have been accompanied by excerpts from the narratives and interviews.

### **CPD**

The school has a long tradition of incorporating a comprehensive professional development program, which consists of yearly observations by the director of studies or one of two teacher-trainers, yearly peer-observations, a yearly training weekend, and training at the beginning of each school year. Teacher observations focus on a different aspect each year and are followed by in-depth oral and written feedback. Peer observations concentrate on the same theme as formal observations. Observers have to complete a specially designed feedback form explaining how a given aspect of teaching has been realized and hand in the form to the management team and the colleague observed. As for the training weekend, it is organized in an attractive nearby village. It is free with food and accommodation provided. Training sessions are delivered by the school's teacher trainers as well as teachers and occasionally guest teacher-trainers (interviews, participant observation).

The teachers seem to be very enthusiastic about the CPD provided by the school. Agata highlighted that she benefitted from it greatly. As Tobiasz pointed out, "there is a lot of scope for professional development offered by this school." Izyda highlighted that "not only is there a substantial amount of training at this institution, but its quality is at an utmost level." Only one of the teachers said that "teacher development could be improved a little by organizing more workshops, and sponsoring more conferences."

The main teacher trainer of the school is a resource writer and a leading trainer in the country, who draws from the most recent trends in foreign language acquisition and converts them into classroom activities that she first tests with her own students. Consequently, teacher training sessions demonstrate innovative, practical activities. Additionally, they address issues detected during class observations and peer observations. The sessions delivered by other teachers present hands-on, already tried classroom activities. Teachers are typically asked to engage in the presented activities, such that they can experience them from the student's point of view and, thus, develop an opinion about their usefulness. Moreover, actively participating in these activities is meant

to help teachers understand them and facilitate their future implementation (researcher's insider knowledge).

Apart from taking part in CPDs provided by the school, instructors are expected to participate in external teacher-training events, for example, conferences for teachers (Tobiasz). Instructors who wish to develop themselves professionally can also take advantage of a well-equipped (Izyda) resource library or request a book to be purchased by the school (Bożena).

Agata: We have a wide range of supplementary materials available.

Bożena: I am very impressed with our constantly updated resource library and the fact that everything is bought when requested.

Additionally, Bożena pointed out that “you can develop yourself thanks to contact with experienced teachers.” As she observed, staff-room discussions typically relate to lesson preparation and sharing ideas and are as valuable as formal CPD.

## Workplace Culture

The positive corporate culture at the school seems to be strictly connected to its history. Founded in the 1990s by the British Council, the institution has a long tradition of being the best in the city. When it was opened, people queued all night for enrolment as there were far more prospective students than the school could hold (researcher's insider knowledge).

Since the school promotes self-growth, many of its instructors have developed to become experts in the field—DELTA holders, certified teacher-trainers, Cambridge ESOL examiners, as well as ELT material writers (researcher's insider knowledge). Consequently, members of staff feel proud and privileged to be part of this team (teacher interviews). Both the school's prestigious past and the high qualifications of its current teachers enhance staff morale, motivation, and the general work atmosphere. All these contribute to the overall drive for professionalism. Everybody makes an effort to fit in with the school profile. Participants also mention peer motivation which Klementyna referred to as “positive competition.” Tobiasz explained how other teachers motivate him:

We motivate one another by example. We can see that other people are striving to be the best in our profession and we just want to be like them.

Furthermore, instructors spoke very highly of the vibes in the staff room, where teachers “are eager to help each other,” plan lessons together, and happily exchange ideas and materials. An ongoing quality conversation makes the workplace truly professional.

Agata: We talk about teaching all the time but I think that we talk about it because we share ideas and materials and it is always like “Oh, I have a lesson on whatever,” and then everybody has, you know, some kind of an idea, “You could do this, you could do that, this book, that book.”

Izyda: We are really great as a team, yes, as a group and I suppose, for everybody it is really, really pleasant to come to the teachers’ room and to share different things, to share different ideas or stories about students, or stories from private life, wherever, but it is a really, really friendly atmosphere.

Klementyna: I had an episode of working for another leading private school in town. I could not believe the boss was constantly chatting with teachers about fashion! I was missing the ongoing professional conversation.

Additionally, teachers declared that they identify themselves with the institution and are supportive of its policy, which, as one of the instructors pointed out, is not the case in every school.

Tobiasz: I couldn’t stress it enough. The place has made me: who I am and what I represent in my professional skills.

## **Organization and Management**

The school is run in a democratic manner. All strategies, changes, and new policies are discussed during staff meetings and subsequently subject to majority voting (participant observation), which makes teachers feel an integral part of the institution. Agata explained:

I have always felt I can have my say in a lot of things and my suggestions are taken into account when it comes to making the school policy. By being involved in decision-making we are more connected to the place and feel the place is also our responsibility.

The present Director of Studies, for example, was selected from among the teachers by vote (researcher's insider knowledge). The narratives demonstrate the teachers' appreciation of the boss and reflect the positive relationship between her and the instructors:

Tobiasz: The boss is very dedicated and does her best. The place wouldn't be the same without her.

Klementyna: The boss is approachable and accessible, mostly among us in the staff room. She has a separate room adjoining the teachers' room and when she is there the door is usually open. When I worked for another school, each time I wanted to speak to the boss, he told me to send him an email. At my other workplace, the boss shuts herself in a room with an access code, which has made me appreciate what I otherwise would have considered normal.

Izyda: This is a positive workplace thanks to a friendly atmosphere and a good rapport between the management and teachers.

Agata: The management is very employee-friendly. I have never felt any negativity coming from the management.

Autonomy, which is a major source of job satisfaction for some instructors, plays a vital role at this institution. Teachers can choose levels (Bożena), coursebooks, and the extent to which they want to exploit them. There is no rigidity in following the coursebook. The only uniformity that exists regards the number of tests and written assignments (participant observation). Furthermore, instructors' preferences about the days they wish to teach and the number of hours are taken into consideration (Tobiasz). Substitutions are paid for and not imposed upon, therefore teachers who wish to earn extra money volunteer for them. Instructors appreciate the rule that the substituted teacher prepares the lessons and gives the lesson plan and materials to the substituting teacher (researcher's insider knowledge).

Bożena: For me, this is the best working environment I've ever worked in—my personal space is respected and my preferences for selecting the level of teaching are considered prior to giving me classes before each academic year begins.

Klementyna: I love the feeling of freedom owing to the choice of dates of my classes. This flexibility has had a positive effect on my family life. The fact that I can choose a coursebook and use one that matches my teaching

style makes me feel comfortable. I also value the fact that all of us teachers are involved in the policy-making of our school.

Izyda: I get to choose the number of groups and the days I teach so I can't complain.

Tobiasz: The management has confidence in me. I get to decide about pretty much everything.

## Teaching Experience

Instructors unanimously state that the comfort of teaching at this school is very high primarily thanks to small, homogenous groups and attractive, well-equipped classrooms. According to the school policy, the number of students per group must not exceed 12. In practice, many classes consist of 5–7 students (participant observation). As Klementyna points out, a small class size reduces the risk of discipline issues and facilitates the implementation of the communicative approach to language teaching. It also makes it easier to tailor seating arrangements to language activities and smoothly switch between pair-work, group-work, and mingling. Group homogeneity has been achieved through written and oral placement testing and creating groups at ten levels of advancement from elementary to post-proficiency. Furthermore, during the first few lessons, teachers are encouraged to verify the level of the classes they are teaching and move learners up or down in order to minimize the differences between proficiency levels (researcher's insider knowledge). Consequently, as Bożena observed:

Unlike at some other schools where I have taught, instructors here have the comfort of being able to concentrate on teaching, rather than managing mixed levels and differentiation.

Instructors also believe that the physical aspect of the school contributes to their wellbeing as well: the classrooms are clean, and well-kept with U-shaped desks. They are equipped with interactive whiteboards, computers, OHPs, and an Internet connection. As Agata commented: "I do like to have a lot of technology. I am this gadget freak and the technology available is more than adequate. I really like the fact that the school is pro-technology." The desks are small, light, and easily movable to form a horseshoe, islands, and other types of layout. Each classroom has a name badge related to the culture of

English-speaking countries with corresponding photographs hanging on the walls (participant observation).

Furthermore, the learners' attitude and engagement stemming from their motivation contribute to the positive teaching experience. When asked about learner motivation, Tobiasz explained:

The students feel the special atmosphere in our school. This makes them want to learn. By showing them that we take our responsibilities seriously we show them that we want them to make progress and they appreciate it. We care more than teachers in other schools.

### **Physical Aspect and Resources**

The school is a modern, well-kept, bungalow with proper lighting and is kept at a comfortable temperature. The staff room is equipped with a wide range of constantly updated teaching and teacher development resources, stationery, two photocopiers, a computer, and a printer (participant observation). The instructors speak very highly of the available resources:

Tobiasz: The resources are sufficient and adequate.

Bożena: What I really like about this job is the opportunity to access new teaching resources and materials.

Izyda: The teaching resources are excellent here.

The school promotes cooperation and sharing. The teachers have always been encouraged to put any supplementary resources or activities in special files dedicated to particular coursebooks (researcher's insider knowledge). Instructors found such shared resources extremely helpful in planning. As Klementyna noticed,

The shared resources save your time. They make your lessons more varied and interesting. They are also great for professional development. When I was new at the school, the shared resources helped me fit in with the style of the school. They also gave me lots of ideas for classroom activities that I continue using.

Apart from sharing resources the instructors also share ideas. Izyda mentioned a big poster in the staffroom, where instructors put new ideas for activities or useful websites they have discovered. She commented that the poster is an invaluable source of inspiration, which enhances her lessons.

The fact that the school has many features more associated with a home has been reported as a boost to instructors' wellbeing. Opposite the teachers' room, there is a lounge with a sofa, a kitchenette with a fridge, a microwave, a kettle, and a coffee machine. Tea and coffee are always provided (participant observation). As Agata commented, "All these facilities help us feel comfortable and make a long working day more manageable." Apart from the physical aspects of the school, which contribute to instructor wellbeing, teachers took pride in describing facilities that their school offered to its customers such as a lobby with tables for students to socialize or do homework; a reception area with a library and a quiet space for self-study.

Generally, instructors are pleased with the physical aspect of the institution. Klementyna pointed out that she particularly appreciated it in comparison with other institutions that did not guarantee the same standard:

I had a short episode of working for a different private language school and only then I began to appreciate what I took for granted when working here. The building was scruffy with peeling paintwork and old furniture. To get to the school area of the building I had to get through an unpleasant, run-down staircase, which put me off teaching. To make things worse, the classrooms were cold in winter!

## **Remuneration and Perks**

Salaries, described by one of the teachers as "competitive," are within the top range for the private language schools (researcher's insider knowledge) and most teachers (twelve out of fifteen) consider them to be satisfactory. What is different from other schools is that the pay rate is transparent and depends on the type of course and level, which, as teachers commented eliminates the rat race, encourages professional development, and is fair. There are usually opportunities to earn more money for placement testing, and exam practice weekends (researcher's insider knowledge). Yet, instructors feel nostalgic about the early days of the school, when remuneration was much more attractive in comparison with statutory pay.

Even though there has been little increase in salaries over the last few years (Kuba), the school offers free tuition for teachers' family members. Klementyna said she was very appreciative of the perk and admitted that her daughter had studied at the school for five years from an elementary to advanced level. Additionally, the school subsidizes the taking of development courses such as the Cambridge Delta preparation course. Most of the teachers have enhanced their qualifications thanks to this perk (researcher's insider knowledge).

The most meaningful comment came from Tobiasz, who said that this school offers him far more than money.

## **Social Life**

A naturally occurring, non-imposed social life among the teachers contributes to teacher wellbeing. There are several regular occasions when teachers meet outside work (interviews). One of them is a Christmas party organized by the boss at her own home. After the final meeting at the end of each school year, all teachers go out for a meal at a restaurant. Every summer, there are garden parties with barbeques organized by members of staff (participant observation). Teachers come to garden parties with their families and, as one of them reported: "Children enjoy playing with one another as if in one, large family." During the training weekend (see Professional Development), there is a party with team games and quizzes. Strong bonds between instructors result in what Agata described as "a close-knit teachers' community" and "the second home." Some members of staff have become friends or even, as Agata put it, "friends for life" and meet outside work, go together on holiday. Klementyna, who brought her boyfriend to one of the events said, "My boyfriend told me that the school feels like a social club, rather than a school," which appropriately sums up the atmosphere and relationships at this workplace. Some of the instructors have become more established at other institutions but they continue working for the school part-time, because of their "sentiment and affection for the place in general."

## **Interview with the Director of Studies**

The director of studies said she cared about the wellbeing of her staff. When asked about the methods she used to promote it, she explained:

I promote it mainly by speaking to people and finding out what their needs are and what their worries are as well and I think it's very important that the director of studies is available for teachers um, even for private matters. It doesn't have to be only strictly connected with teaching, but I think they need to know that there is somebody that they can always talk to, um, it's kind of management by walking around, yes, and by being with people as much as possible and responding to their anxieties on the go.

Maria added that it is essential that teachers have everything they need: good quality classrooms, good quality equipment, and a sufficient number of books that can be used as extra materials. Furthermore, she highlighted the significance of CPD:

It's important that people take part in webinars, conferences, so they can listen to other ideas of other people, and this gives them a spark to change something in their own teaching and this is motivating cause there is nothing worse than repeating the same things every year, the same textbook, the same exercises, the same methodology. I think it leads to burnout sooner or later, so there needs to be new fresh air that might come from these kinds of training or talking to other teachers.

Maria revealed that promoting social life was her conscious policy as the head of school:

It's important that people like each other, that they share parts of their private lives, so it is important to go out together, to have barbecues, to have this Christmas party that I'm organizing at my house because this links people and when they are linked, they are more eager to cooperate, and the atmosphere is not as tense as it could have been otherwise.

The director of studies observed that her effort has paid off because her staff do not seem to treat the school just as a place of work where you come and go as quickly as possible but they like talking to each other and are keen on each other's company. She added that she also genuinely enjoyed socializing with them: "I love meeting the teachers privately, I love laughing and dancing with them, it's not just part of my duties, but it is also a pleasure."

### **Research question 3: What aspects of the institution contribute to teacher stress?**

The first questionnaire did not reveal any sources of stress. Teachers mentioned several stress factors only when asked specifically to do so in the second questionnaire. Three instructors said that their main source of stress was using technology, or rather, as Agata put it, “expectations related to state-of-the-art technology.” Two teachers expressed a wish for a designated technical support person to help with issues related to technology and thus, reduce a substantial amount of stress. As Bożena pointed out, “there’s nothing worse than discovering that the equipment is not working just when you are about to start the class and you don’t know how to fix it.”

Time-consuming class preparation was another stressor mentioned by two instructors. Teachers at this institution make an effort to meet the students’ expectations and fit in with a high standard of teaching. As Agata reported, “The only stressor I can think of is the number of hours I have to put in in terms of preparation for classes.”

Kuba, who despite being a full-time member of staff, works freelance with a contract renewed each year revealed that “job insecurity is an issue and so is lack of benefits and no pay rise in years.” Additionally, even though instructors generally agreed they benefitted from quality teacher training offered by the school, there was one negative comment that there was “too much CPD for experienced teachers because self-motivated teachers do not need so much supervision.” Contrary to this, Bożena, who was a less experienced instructor, observed: “Teacher training could be improved a little by organizing more workshops.” She added that “sponsoring more conferences” would make a difference since not all teachers can afford them.

## **Discussion**

The study has identified and demonstrated institutional features that truly matter to teachers, contribute to their professional wellbeing, and help them to thrive as FL instructors. The crucial source of the teachers’ job satisfaction seems to be a wide range of free, quality teacher training opportunities, which have enabled the teachers to develop and achieve excellence that they are proud of. In addition, the teachers’ contentment results from being a part of a dedicated team of experts that motivate and support each other professionally.

Teacher-friendly, democratic management is another key source of the instructors’ wellbeing. The teachers value their boss’s availability and ap-

proachability as well as the fact that they are involved in the decision-making process. Furthermore, the team feel that the school policies contribute to their enjoyment by allowing instructors abundant autonomy as well as the influence on their timetable, and a degree of flexibility regarding dates of classes. This family-friendly approach helps teachers reconcile work with life and also with other jobs.

Additionally, school policies regarding small class size and careful placement together with the provision of appropriate physical conditions, equipment, and free resources have a positive effect on the instructor teaching experience (Mercer, 2020b), which is further enhanced thanks to motivated learners attracted by the institution's reputation. School experience outside teaching time also seems to be uplifting as a result of the institution's home-like features and the positive atmosphere, which stems from instructors' enjoyment and strong bonds between the staff members. The "close-knit teachers' community" (questionnaire) is a result of the manager's conscious effort to promote team building. Last but not least are the adequate salaries and perks, making instructors feel that their work is appreciated. All these features give the instructors a sense of belonging and identification with the institution (Skaalvik & Skaalvik, 2011), which appears to be an essential element of their professional wellbeing.

Unlike previous study results on LTWB that focus on mainly teacher stressors (e.g., MacIntyre et al., 2019; Mercer, 2020b) and look more marginally at uplifts, this research presents us with thriving teachers, experiencing good wellbeing. The participants are unanimous in terms of their enjoyment of the workplace and do not mention any negativity unless prompted, even though they must experience typical stressors embedded in the language teaching profession, like emotional labor (Mercer, 2020b) or insecurities related to one's second language (Horwitz, 1996). This could signify that prevailing wellbeing overshadowed any job-related anxiety and resulted in an overall positive mindset. Only when asked precisely about stressors in the follow-up questionnaire did the participants enumerate several downsides that were not critical for their overall wellbeing (Babic et al., 2022).

The samples did not demonstrate that they were affected by general teacher stressors found in previous research, with the exception of technology (Mercer, 2020b), which in this institution was available, yet, not always reliable. As far as stressors more specific to private language school teachers are concerned, job insecurity and lack of benefits were mentioned by two full-time, self-employed freelance staff members, which is consistent with previous research run in the private sector (Mercer, 2020b). Another similarity was the tension resulting from students or their parents who are paying customers with high expectations (Mercer, 2020b). On the contrary, other factors contributing to teacher stress that were found in previous research, such as teacher status, access to resources, physical and organizational conditions or student motivation

(Wieczorek, 2016) were in this school considered as causes of positive emotions, rather than tension. Furthermore, uplifts found in previous research (Babic et al., 2022; Mercer, 2020b), such as staff relationships, rapport with the manager, autonomy, and CPD, were observed in the present research as well.

This case study results are different from Mercer's (2020b), who also conducted research in a private sector context. There are several reasons why this contradiction manifests itself in this institution. Firstly, the difference may be attributed to the historically higher status of English language teachers in Poland. As Mercer (2020b referring to Buunk and Ybema, 1997) highlighted, professional status and prestige are important for staff wellbeing. Secondly, the school is in the private sector but belongs to an institution rather than a private owner, therefore it is not so obvious that the business is run on a for-profit basis—there is no evidence of greed and willingness to exploit teachers (Sullivan, 2014). On the contrary, as one of the teachers observed, this institution's priorities are team spirit, professionalism, and self-development of the staff. Thirdly, the school has an excellent reputation, a prestigious origin, and a long tradition of good practices, which boosts staff morale. Additionally, most teachers have permanent jobs elsewhere and therefore are not nervous about a potential lack of stability. Besides, the fact that they have worked for this school on average for 20 years suggests that job security is not a point of concern at this workplace.

The study demonstrates how an institution can contribute to teacher wellbeing at the systemic level by depicting a well-functioning language school in the private sector in Poland. It is hoped that the study will help policy-makers acknowledge teachers' needs. Previous research has shown that not all language institutions recognize the importance of teacher wellbeing (Mercer, 2020b; Wickham, 2015). Hopefully, this paper will make a contribution toward educational leaders realizing the value of a satisfied team of teachers. Leaders should recognize the invaluable amount of enthusiasm, engagement and dedication teacher wellbeing generates, which will surely translate into student achievement and joy of learning. Perhaps this study will persuade those unconvinced managers and policy-makers to revisit their principles and begin recognizing and addressing their staff's needs. The good practice emerging from the research could serve as guidelines for educational institutions in all contexts, the primary objective of which should be to maintain teacher wellbeing (Maslach & Leiter, 1999).

This is the second study in this under-researched context after Mercer's (2020b) ecological research of language teachers working in the private sector in Malta. Research from other countries where English is taught as a foreign language in the private sector would shed more light on systemic factors promoting or detracting from teacher wellbeing. Another salient research avenue would be looking at teachers of other languages working in the private sector.

The body of research that will hopefully grow will benefit FL teachers and their learners as well as managers and institution owners.

## Conclusion

The results demonstrate how the institution enables teachers to flourish, thanks to its positive culture, policies, organization, management, opportunities for professional growth, social life, as well as adequate resources and physical working conditions. This is consistent with Mercer's (2020b) argument that "systems, cultures, contexts, and policies can impact on individual wellbeing" (p. 3). It is remarkable that language teacher wellbeing was realized at this institution in a natural way, long before the arrival of positive psychology. For this reason, the institution embodies a long story of success.

Wellbeing is essential for teachers to thrive, to stay in the profession, to be in good physical and mental condition, and needs to be guaranteed by policy-makers and people in charge of educational institutions. Therefore, it is critical to demonstrate stress-provoking institution features that need healing. It is equally important to point out good practices that strengthen teacher wellbeing and empower instructors to enjoy their vocation despite the stressors which are inherent in their profession. This paper shows practices that matter to teachers, are appreciated by them, make them identify with the institution, and want to work for it. As Jin et al. (2021, p. 20) state,

It is thus important to understand what enables teachers to flourish in their professional roles and what challenges can hinder their professional wellbeing. The implications need to create guidelines for institutions and policy makers to ensure that teachers are in the best position to be the best educators they can be.

Some of the positive features that make up the LTWB at this workplace, such as the school's well-established reputation, cannot be recreated elsewhere. Other, more universal facets, such as those related to the organization and management, could be easily implemented by other language schools in the private as well as the public sector for the benefit of teachers, their learners, and consequently workplace performance. Sometimes, all they require is a bit of goodwill, empathy, or a human approach.

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Katarzyna Budzińska

## **Das Wohlbefinden der Lehrer im Kontext einer privaten Sprachschule: Eine Fallstudie**

### Zusammenfassung

Das Wohlbefinden der Sprachlehrer im privaten Bildungssektor wurde bisher von der Forschung fast völlig vernachlässigt. Die vorliegende Studie nimmt eine gut funktionierende private Sprachschule unter die Lupe und analysiert die systemischen und kontextuellen Faktoren, die dazu beitragen, dass sich Lehrkräfte in ihrer Rolle entfalten können. Das Wohlbefinden der Lehrer wird auf Grundlage der Befragungen mit offenen Fragen, ausführlicher Interviews bzw. teilnehmender Beobachtung untersucht. Die Ergebnisse deuten auf mehrere Aspekte hin, die sich auf systemischer und institutioneller Ebene positiv auf das Wohlbefinden der Lehrkräfte auswirken, wie z. B. Unternehmenskultur, Arbeitsverfahren, Arbeitsorganisation, Management, berufliche Entwicklungsmöglichkeiten, zwischenmenschliche Kontakte, Unterrichtsmaterialien und -hilfen bzw. physische Arbeitsbedingungen. Die in der Studie beschriebenen guten Praktiken sind größtenteils universell und können in allen Kontexten des Sprachunterrichts angewandt werden. Dabei gibt es einige Faktoren, die sich besonders förderlich auf das Wohlbefinden der Lehrkräfte auswirken, allerdings sich nur schwer in anderen Einrichtungen wiederholen lassen.

*Schlüsselwörter:* Privatsektor, Lehrkräfte, Wohlbefinden, positive Psychologie, positive Institutionen, Sprachunterricht

## Questionnaire 1

Personal information:

Age

Nationality

Gender

Number of years at the institution

Number of years as a language teacher

- Do you think X is a positive workplace (promoting teacher wellbeing)? Why?

## Questionnaire 2

1. How do you feel about X student-friendly approach to evaluation (grades given in percentage, peer testing, descriptive final grade, possibility to retake every element of coursework)? Does it make your job less stressful? Why? Does it have a positive effect on your relationship with students? Please comment.

2. Do you tend to have a good relationship with X students? Where does it come from? (your conscious effort—give examples; student motivation, other reasons?)

3. How do you feel about your relationship with X management? Can you name any positive/negative aspects of it?

4. How do you feel about your relationship with X colleagues? Can you name any positive/negative aspects of it?

5. How do you feel about the student number and their level of homogeneity in your X classes?

6. Do you find X students motivated? Where do you think their motivation comes from?

7. How do you feel about the physical aspect of X?

8. How do you feel about X resources for teachers?

9. How do you feel about teacher development at X (observations, training sessions, conference)?

10. How do you feel about your autonomy at X (your influence on timetable days, times, dates, coursebook, level, workload, etc.)?

11. Do you feel you have sufficient autonomy within your classroom? Please comment/give examples.

12. How do you feel about X democracy in terms of policy-making, strategies, and changes (discussions and votes)?

13. Are there any stressors related to your teaching job at X? Can you name them? Does your enjoyment outweigh negative emotions? Please comment.

14. Do you teach at any other institution(s)? How does your wellbeing at that institution compare with your wellbeing at X?

15. How much do the following aspects of being an X teacher contribute to your job satisfaction?

- 1) small groups
- 2) homogenous group levels
- 3) motivated students
- 4) your relationship with students
- 5) your relationship with colleagues
- 6) your relationship with managers
- 7) your salary
- 8) teaching resources
- 9) opportunities for professional development
- 10) autonomy (influence on timetable, level, coursebook)
- 11) autonomy within your classroom
- 12) democratic decisions about school policies
- 13) student-friendly evaluation (peer-testing, grades in percentage)
- 14) physical aspect—building, classrooms
- 15) equipment/technology
- 16) atmosphere at work
- 17) Can you name any other sources of your job satisfaction?

Appendix C

### **Focus group meeting—Semi-structured interview questions**

- 1) Do you think the school promotes teacher wellbeing? Why?
- 2) Do you think this school is prestigious? Why? Does it affect the way you feel about working there? Are you proud of working at this school because of its prestigious history?
- 3) How would you characterize the status of EL teachers in Poland? Why is it high/low? Has it changed?
- 4) Does the fact that the school is owned by an institution—University rather than a private owner—have an influence on working conditions/atmosphere?
- 5) How would you characterize the corporate culture of the institution? Is it different from other language schools? Do you think there are more professional conversations than at other schools?

- 6) There are some highly qualified members of staff—leading teacher trainers, coursebook writers, DELTA holders—does it influence the way you feel about this institution?
- 7) Do you think you have an influence on policy-making at this institution? Is it important for you?
- 8) Do you find the place professional?
- 9) How is CPD realized at this school? Does it help you develop professionally? Does professional development contribute to your wellbeing? Is it important for you?
- 10) Does the atmosphere positively affect your LTWB?
- 11) What can you say about your colleagues' motivation and commitment to the profession?
- 12) Can you observe peer motivation? Peer support?
- 13) Do you identify yourself with the institution?
- 14) Is there anything about the boss's style that has a positive/negative influence on your wellbeing?
- 15) Is the scheduling teacher-friendly?
- 16) How do you feel about the comfort of teaching? (small, homogenous groups, motivated students?)
- 17) What do you think of the physical aspect of the workplace—classrooms, staff room, other facilities, and resources?
- 18) What are your comments on social life? Does it contribute to your wellbeing?
- 19) Does your relationship with your students affect your wellbeing?
- 20) Is the salary adequate (in comparison with other schools)?
- 21) Do you experience any stressors related to this workplace?
- 22) Do positive aspects outweigh negative ones?

Appendix D

### **Interview with the Director of Studies**

- 1) Do you care about teachers' wellbeing?
- 2) What do you do to promote it?
- 3) Apart from what you do does the school promote teacher wellbeing?
- 4) Do you think LTWB would be more difficult to promote if there was a private school owner instead of a state institution owner?
- 5) In what way the fact that it is a profit-driven institution affects LTWB?
- 6) Many members of staff remained loyal for over 20 years? What do you think has kept them?
- 7) Do you think the school's prestigious roots have affected LTWB?

- 8) The school had positive policies long before the arrival of positive psychology. How was it achieved?
- 9) What kind of contracts do teachers have?
- 10) Do you genuinely enjoy taking part in the school's social life?



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## Diagnostic Abilities of Novice Teachers

### Abstract

This paper discusses diagnostic abilities of novice teachers of English as a foreign language in Poland as demonstrated through analyzing critical incidents (CIs). A case study, designed to explore patterns and regularities in cognitive processes that practitioners activate to examine disorienting situations in their educational context, provided evidence of effective mental work of beginner teachers at the verbal and conceptual levels. Specifically-structured written reports on what the instructors considered critical moments in their teaching practice served as a tool to verbalize how they represent, interpret, and value phenomena in the FL classroom by activating and integrating various sources of professional knowledge. The data analysis, which included both identification of the character of mental representations the subjects stimulated during the recall as well as higher order thinking operations on these representations, led to the conclusion that the inexperienced teachers show a degree of efficacy to register relations and variation in classroom realities, to problematize the unproblematic, to take position on matters, and to formulate relevant feedback for their future didactic moves. This encourages a hypothesis that teachers' diagnostic abilities are not necessarily determined by the current state of their professional expertise and that limited classroom experience does not suppress adequate cognitive and affective responses to problems in beginner practitioners.

*Keywords:* novice teachers, diagnostic operations, critical incidents, cognitive processes

The conceptualizations of what makes an expert language teacher have evolved over the years along with the mainstream methods in TEFL. While decades ago teachers were assumed to be “doers” whose highly competent controlling behavior in class was decisive for effective language learning, more recently, the quality standards in formal instruction shifted the gravity towards teachers' thinking, namely their observant and analytical abilities that allow them to navigate essential adjustments to the specificities of educational context (Burns, Edwards, & Freeman, 2015; Gabryś-Barker, 2012; Boshuizen,

Bromme, & Gruber, 2004). Much of the current view of novice teachers remains unchanged, though, and predominantly focuses on their underdeveloped capacity to efficiently respond to emerging challenges. Indeed, research demonstrates that it is accumulated classroom experience that mostly supports teacher learning and brings newcomers from the periphery of the professional group to its core (Farrell, 2007; Borg, 2006; Day, 2004; Hargreaves, 2003; Richardson, 1996).

The study reported in this paper adopted a cognitive perspective on expertise, which holds that a degree of cognitive energy deliberately expended to (1) recognize nuances in observed events, (2) define problems, (3) integrate relevant mental resources for controlled reasoning about their causes, and (4) exercise professional judgment about their significance for FL learning is equally important in reorganizing knowledge representations (Tripp, 2012; Tsui, 2005; Bereiter & Scardamalia, 2003; Freeman 2002; Rogers, 2002; Johnson, 1998). Sternberg and Horvath (1995) long proposed to fully accept unexpected configurations of attributional similarities between beginner and advanced practitioners. The attribute of insight is one such category, within which variances among its members are determined by demonstrated cognitive abilities, not years of practical experience. In this view, it is reasonable to assume that novices, who are yet to build a repertoire of mental models of classroom situations to help them regulate and accelerate their strategic behavior, might still be capable of conducting diagnostic operations and evaluating both problems and their responses to them (Perry, 2003).

In principle, whether classroom events induce teachers' critical analysis or not depends on how they represent them mentally. The cognitive processes involved in constructing representations include perception, attention, and memory, but meaning-making is additionally motivated and influenced by prior knowledge, beliefs, moral standards, emotions, and other context-dependent psychological factors. The occurrences in class recognized by practitioners as perplexing, upsetting, or intriguing are highly likely to prompt conceptual work channeled into finding a rational explanation of what happened and reducing the sense of cognitive dissonance (Guerra & Wubbena, 2017).

The purpose of this study was to investigate mental effort put by EFL instructors in diagnosing critical incidents in teaching. Specifically, the acts of diagnosing, verbalized by the participants in written reports, were expected to reveal how they review available evidence, reason, and formulate professional claims about disturbing situations they had encountered in the class. The results exposed some characteristics of good diagnosticians in the least experienced participants. What follows is an overview of the diagnostic abilities as perceived in cognitive psychology. Next, the study and its findings are discussed with regard to the identified characteristics. The concluding part of this paper offers recommendations for teacher training and suggestions for further studies into novices as experts.

## Identifying Effective Diagnosing

Diagnosing is a process of problem-solving, which requires that reasoners explicitly define a gap in their current knowledge and manipulate existing mental representations to establish relationships between them, draw causal inferences, formulate rules, and propose solutions that optimally fill the gap (Strasser, 2010; Thagard, 2005; Pretz et al., 2003). These computational operations produce change in teachers' cognitions, that is, revised understandings of instructional principles and classroom phenomena, the application of which will affect their didactic behaviors in the future.

The first and necessary condition for effective diagnosing is *comprehensive evidence*, on the basis of which instructors will hypothesize about the origins of events and interpret their meaning (Johnson, 1998). This foundation for reasoning consists of physical and non-physical manifestations of information, including not only the parameters of the learning context, but also the actions, thoughts, and emotions the teacher showed him/herself. Situational awareness (SA), defined as increased attention that enables the individual to distinguish constituents of critical incidents (Endsley, 1995), has been observed to grow in both more and less experienced professionals through simulation- and reflection-based training (Salminen-Tuomaala et al., 2020). The finding supports a fundamental principle of information processing that perception and attention are controlled processes in their part, hence unrelated to one's professional status. Novice instructors can successfully regulate these processes and discriminate elements of classroom situations, just as experienced teachers do (Rogers, 2002). Tripp (2012) claims that it is the openness to "competing ways of seeing" (p. 27) that increases teachers' sensitivity to subtleties of the circumstances and enables them to proceed with legitimate analysis of events.

Affective thoughts about distressing events occur naturally in the recall process. In the literature, the attributes of emotion have been recognized as part of our remembering selves and as such are embedded in personal narratives (Goldie, 2000). If the attention is largely captured by subjective perceptions and feelings, a picture of a past situation might get contaminated, and so its further analysis. An emotionally intelligent approach to one's experiences involves subduing rather than fueling affective responses to retrieved memories, which makes biases cognitively manageable (Jagtap & Guaro, 2016; Gross & Thomson, 2007). McManus (2011) emphasizes that emotional literacy raises our self-awareness but is impossible to develop without situational awareness.

The second constituent of diagnosing—the *identification of causal forces* behind events—involves systematizing and classifying the collected information. The ability to think, that is, to acquire and manipulate concepts, is the fundamental aspect of human intelligence and cognition, not the prerogative of

experts, although organizing mental representations as hierarchical knowledge structures available for continuous verification has been accepted as a characteristic of expertise across domains (Holyoak, 2005). Mollon (2000) explains that in order to reasonably hypothesize, we need to turn what is pre- or subconscious into our explicit understanding of reality. This prevents us from acting upon a feeling of knowing and instead mobilizes our mental resources to surface the conceptual foundation for our actions, to seek congruence between thought and behavior, and to produce an important learning outcome (Alexander et al., 2011).

Psychological studies indicate that individual differences in cognitive capacity (working memory, intelligence, executive functions, or inhibitory control) and previously established understandings determine how we validate premises we operate on, map connections between knowledge representations, and formulate propositions about observed phenomena (Kottmeyer, Van Meter, & Cameron, 2020; Gray & Holyoak, 2019). On the other hand, Kahneman's (2011) dual-processing model of the brain, in which System 1 generates intuition-driven associations while System 2 makes the higher-order computational effort in problem-solving situations, demonstrates the limitations of human reasoning. It has been argued that System 2 is inclined to boil down analogical processes to heuristics (West, Toplak, & Stanovich, 2008). According to Kahneman (2011), this inclination reveals systematic errors in the thinking mechanism and might have a detrimental impact on one's professional growth, for mental shortcuts freeze rather than revise personally-held systems of beliefs (Schraw & Robinson, 2011; Eysenck & Keane, 2010; Martin, 2009). The assumption is hence encouraged that if extensive experience and retentive memory does not prevent people from a cognitive bias, inexpert practitioners are not radically different from their senior counterparts.

Those who deliberately activate the doubter (System 2) and ask probing questions about their experiences are likely to reduce potential shallowness of performed analysis, that is, to minimize inaccuracies in establishing causal relations between events (Tripp, 2012; Tsui, 2005). Also, they might gain a better understanding of what beliefs, principles, moral standards, and values make up their personal theories about TEFL (Borg, 2003). Logical reasoning does not manifest through searching for ultimate truths. On the contrary, Bereiter and Scardamalia (2003) call it a "make-it-better" heuristic, which aims at improving ideas, opening problems, assessing actions, and exploring possibilities for further considerations.

The ultimate stage of effective diagnosing is *building claims* about FL teaching and learning. According to Tripp (2012), formulating professional judgments about the state of affairs is a matter of making "expert guesses" (p. 125), which manifest teachers' knowledge, in-depth inquiry, and wisdom. The verifiable nature of those guesses resists the pressure to always provide

accurate assumptions, yet it encourages systematic re-evaluation of available evidence, established understandings, and workable solutions. Tripp's typology of judgments includes four kinds of conclusions teachers arrive at in their daily practice, the characteristics of which differ with regard to the length of processing, source of orientation, and outcome (Table 1).

**Table 1**

*Four Kinds of Professional Judgments (Tripp, 2012)*

	practical	diagnostic	reflective	critical
source of understanding	professional expertise	reasoning	personal values and beliefs	professional expertise and reasoning
length of processing	short	prolonged	short/prolonged	prolonged
outcome	workable solutions to problems	increased awareness of one's own decisions	attitudes	verified standards and knowledge representations

While practical judgments are informed by application of professional expertise and represent instant answers to classroom problems, diagnostic judgments are based on prolonged reasoning and examination of one's own didactic moves. Reflective judgments identify the influence of personal beliefs on one's performance, and critical ones aim to verify the current knowledge, including its subjective dimension. Good diagnosticians adopt all the strategies to interpret the meaning of emerging difficulties and to take a competent position on matters. As research demonstrates, regular structured attempts to break down meaningful events (critical incidents) and to articulate legitimate rationalizations can help inexperienced teachers acquire the ability as early as during pre-service training programs (Gabryś-Barker, 2012).

On the whole, research on the cognitive work of diagnosis, and novice teachers thinking and acting expertly in particular, is rather limited. In Johnson's (1996) case study, for example, an inexperienced instructor reflected in a personal journal on her didactic experiences (mostly failures). The novice was capable of recognizing, analyzing, and evaluating her teacher-centered methodology in a surprisingly transparent and informed manner. She could explain not only why ignoring questions from her students (the approach she conceptually disapproved of) served as the easiest way to ensure that the lesson content be covered as planned, but also how it affected the learners. Gattbonton (2008) compared in her study the verbal recall of what novice and experienced instruc-

tors were thinking about while teaching, and she concluded that the pedagogical knowledge activated by the beginners was similar to that of seniors, especially with regard to such categories as procedure and comprehension check, progress review, or students' prior knowledge. Finally, Tripp's (2012) training program in AR for Australian educators demonstrated that novice practitioners promptly developed cognitive competence to raise pertinent questions about problematic situations they had faced in the classroom, to make reasonable inferences about their potential causes, and to construct critical evaluation of the events. In doing so, some outperformed their more experienced counterparts.

Clearly, more empirical data is required to understand how entry-level instructors formulate judgments about FL instruction and what these judgments are primarily fueled by. Sternberg and Horvath (1995) reasonably argue that as long as the same criteria are applied to measure the performance of early and late-stage practitioners, they will naturally expose deficiencies in the former. Instead, it is recommended to examine what cognitive resources novices can successfully activate and integrate to evaluate classroom events and their own didactic behavior.

## Study Methodology

The case study, the results of which are presented below, sought to distinguish regularities in the way teachers of English perform diagnostic operations, that is, respond cognitively to classroom circumstances that they recognize as potentially decisive for a better understanding of English teaching and learning. The study was based on the assumption that critical incidents, considered as problem situations, stimulate operations on mental representations, including rules, concepts, images, analogies, and emotions. These operations lead to causal inferences and indicate both the sources and relevance of knowledge activated for this purpose. Consequently, the research questions aimed to determine:

1. How the participants mentally represent problem situations;
2. What sources of professional knowledge and abstract constructs they integrate to analyze these situations;
3. What reasoning skills they exercise to identify the causes of critical incidents;
4. What types of claims/judgments they build as a result of the diagnosing process.

Written reports, in which the participants described, analyzed, and evaluated critical incidents in their teaching settings over a period of time, constituted the elementary units of inquiry and the source of both *qualitative and quantitative data*. The examination of the material was hence guided, on the one hand, by

the idiosyncrasies of content communicating teachers' thoughts at the three stages of the task, and, on the other hand, by the frequency of occurrences of distinguishing features across the texts.

The process of collecting data exceeded two years and resulted in a total of 73 reports, 33 of which were generated by novice teachers (T1:10; T2:11; T3:11).

## Participants

There were seven study participants: Polish teachers of English as a foreign language. They were all qualified instructors; however, their classroom experience ranged from a couple of months to 17 years. The division into entry-stage (T1, T2, T3: less than two years of teaching practice) and middle/late-stage professionals (T4, T5, T6, T7: more than five years of teaching practice) precisely reflected the age composition of the group (20s vis-à-vis 30s/40s). Recruited from different work environments, including primary, secondary, and higher state education as well as an English language school, the participants remained in a professional relationship with the researcher. In her capacity as Director of Studies, the latter supervised the work of T1, T2, and T3 in a private educational establishment, where they landed their first EFL positions. T2 and T3 were university graduates in English Studies with adequate methodological practicum granted, while T1 held an MA in Applied Linguistics at Durham University, UK, and was new to the Polish schooling system. She lived and studied in the USA until, in her mid-twenties, she decided to return to her Polish roots and teach English in her birthplace. A unique cultural background that she represented was a relevant factor contributing, as discussed below, to her execution of the diagnostic task.

## Procedure

Each of the participants was instructed to write at least ten reports aimed at diagnosing critical incidents (CIs) in their teaching contexts within the stretch of a school year. The concept of critical incidents (problem situations) was introduced to every teacher, and guidelines how to navigate the search provided:

- think of a situation which distracted you from work as it disagreed with accepted norms, a didactic challenge which you managed/failed to handle on the spot;
- something upsetting, amusing, insulting, exciting, or embarrassing that you have noticed, done, or heard as a teacher;
- an event or a lesson procedure that you distinctly remember although it was your usual teaching routine;

- a classroom episode that aroused your curiosity;
- or a moment of realization that your knowledge about teaching English as a foreign language was inadequate for the situation.

The options above show that the participants had a free choice from positive and negative teaching experiences. Two samples, related to a successful and upsetting occurrence in the classroom, were analyzed at the introductory stage of the study, with the emphasis placed on their distinct structure: (1) description of the event, (2) its analysis, and (3) professional judgment. In this respect, the following outline was supposed to assist the teachers throughout the task:

#### Description

- present the background of the incident;
- summarize events, your (re)actions and emotions;
- point to the critical moment.

#### Analysis

- identify the problem (assign professional concepts/categories to the parts of the incident / establish causal relationships between them);
- specify the question(s) which the incident brought up;
- name your responsibility;
- think of alternative scenarios for the incident and its outcomes.

#### Judgment

- evaluate the significance of the incident vis-à-vis your expertise in EFL teaching as acquired through your teacher training, English learning and teaching experience, the subject literature, personal theories, or colleagues;
- construct feedback for future reference in your teaching practice.

To prevent potential influences on the study outcomes, interventions into the process of report writing were kept to a minimum. Still, three updates were received from the teachers after two, five, and nine months into their work. This way, the participants had a chance to raise questions or communicate concerns. The individual contributions to the study were completed upon receiving electronic submissions from the teachers, which, as signaled above, took much longer than expected/planned.

## Data Analysis

The content of the reports went through a few stages of segmentation.

First, based on the writers' lexical choices and their prevalence, it was determined what kinds of situations attracted the participants' attention to be represented as critical incidents. For example, expressions like *a drama started*, or *it was a real let-down*, as opposed to *the students were mesmerized by my idea*, or *it was a rewarding experience*, indicated negative and positive experiences respectively. The initial stage of analysis also included the thematic

categorization of critical incidents, namely aspects of teaching they covered. The identified common areas of focus were: (1) the participants' didactic decisions/behavior, (2) their observations of learners/colleagues, and (3) feedback they received from learners, their parents, and supervisors.

Second, mental constructs and concepts that the teachers relied on in their diagnostic task were established by using Gatbonton's (2008) methodology of breaking sentences into so-called thought units. Thought units in this study refer to language chunks (words, phrases, or clauses) communicating complete ideas, and so were termed Meaningful Thought Units (MTUs). Those were examined at both functional and conceptual levels. The functional labeling of MTUs corresponded to the structure of the participants' task, namely describing, analyzing, and evaluating critical incidents, whereas the conceptual identification of MTUs was based on the nature of representations and consequently categorized as cognitive (C), imagery (I), and affective (A) constructs. The cognitive MTUs were analyzed for evidence of professional orientation. This resulted in recognizing several broad categories commonly related to in the reports, such as procedural and conceptual knowledge, context, feedback, past experience, knowledge of students, search for understanding, self-critique, self-knowledge, beliefs, and problem areas. The sentence below provides a sample of how segmentation and processing of the collected material was executed.

Teacher: <sup>1</sup>*In class, I made them repeat the wrong pronunciation many times,*

DESCRIPTION MTU (the teacher recalls what she did) + COGNITIVE MTU (procedural knowledge—the teacher is aware of her didactic choices to manage the learning content).

Teacher: <sup>2</sup>*which means its auditory representation was created and stored, even if temporarily.*

ANALYSIS MTU (the teacher interprets her action) + COGNITIVE MTU (conceptual knowledge—the teacher understands the linguistic consequences of her mistake for the learners; she logically links the frequent repetition of a word with the possibility of learning its wrong form).

With regard to emotionally loaded thoughts in the participants' reports (affective MTUs), the analysis was narrowed to the intensity of identified units. Average and strong representations were assigned 1.0 and 2.0 respectively. Their classification was based on discourse analysis, where, for example, the statement *I was **trembling all over my body** with **excitement** and joy* was granted 2.0 while *I was impressed by their work* merely 1.0.

Lastly, the categorization of the material, supported by NVivo QSR Application, opened up possibilities to analyze it. For example, it was observed that T2 repeatedly referred to learners' behavior in his reports. The comments he made in C11: *At the end of the lesson, one of the boys was quite frustrated*, C15: *I saw they wanted to be noticed*, C18: *The boy realized he was actually good at English and apparently he appreciated the praise*, and C110: *She said nothing, but I could tell she did not buy my explanation* appeared analogous in that they revealed the teacher's tendency to pressurize his perceptions of students' behavior into absolute certainty, although they were based on his subjective impressions.

The trajectories of teachers' thoughts were investigated so as to establish how practitioners proceeded from outlining problem situations, to determining causal relations between their constituents, developing conclusions based on identified premises, and assessing one's own decisions. This allowed for inferences about the teachers' understanding of classroom realities and their judgments as impacted by their professional knowledge as opposed to their personal values, attitudes, or preferences. Statements like *I'm positive that the boy was used to being rebuked by his teachers and parents all the time, and he expected the same from me*, or *Getting mentally ready for a challenge brings peace to heart* were recognized as reflective thoughts rested on personally-held systems of beliefs, the propositional value of which was rather unsubstantiated. By contrast, an MTU such as *The effectiveness of note-taking is dependent to some extent on the way the information is organized on the board/slides* was classified as demonstrating a didactically justified claim that a chaotic and accidental use of the whiteboard is of doubtful assistance to the process of language learning. To determine the character of professional judgments the participants formulated, Tripp's (2012) typology, discussed above, was used as the benchmark, including practical, diagnostic, reflective, and critical evaluations.

## Results

As discussed above, the effectiveness of the diagnosing process at each of its stages rests upon a range of abilities, a level of which might show variances in and among practitioners. The areas of diagnostic competence identified in the novice study participants regarded all aspects of the task execution, such as establishing mental representations of events (Research Question 1), integrating sources of professional knowledge (Research Question 2), applying higher-order thinking strategies (Research Question 3), and formulating critical judgments about one's experiences (Research Question 4). The examples below illustrate that beginner teachers show potential as diagnosticians. Two instances per

person will be discussed, yet the acquired data provides further confirmation of the desired features in the novice instructors.

### Teacher 1

#### *Mental Representations*

The series of critical incident (CI) reports composed by T1 was characterized by an exceptionally suppressed expression of feelings. The number of emotionally-loaded thought units she communicated at both the description and analysis stages of diagnosing were the lowest of all (Table 2).

**Table 2**

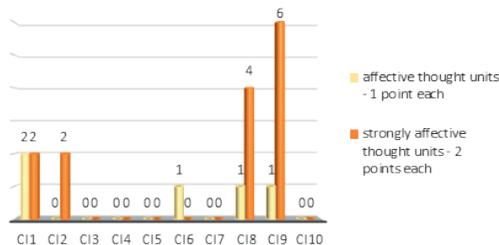
*The Distribution of Affective MTUs in the Descriptive and Analytical Segments of Critical Incidents Reports of T1 (Bolded Red) versus the Other Participants, Including Beginner and Experienced Practitioners*

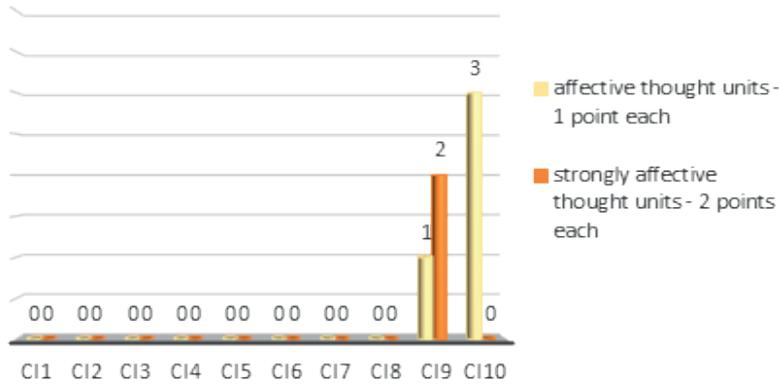
The descriptive segment of CI reports	The analytical segment of CI reports
Affective MTUs (%)	
13,4	5,3
<b>6,5</b>	<b>4,5</b>
17,2	21
11,7	26,8
12	31,4
14,7	10
16,8	10,8

Similarly, the intensity of these units scored the lowest at the respective phases of the task performance (Figures 1 and 2).

**Figure 1**

*T1's Affective Thought Units in Description*



**Figure 2***T1's Affective Thought Units in Analysis*

While comments reflecting factual and imagery content in other participants' reports were commonly intertwined with their attitudes towards learners, their behaviors, observed problems, and reached decisions, T1 placed the focus on HOW the events unfolded and WHY (cognitive MTUs), rather than WHAT affective states they evoked in her (affective MTUs). The critical incident (CI6) presented below constitutes evidence of what might be considered the teacher's emotional detachment. The underlined section indicates the only affective reaction the situation provoked in the instructor:

One of the crucial elements of English teaching is the materials that are used in the classroom because they are one of the main driving forces behind learning. Everything that teachers use to teach language could be considered as teaching material. The different types of materials available for classroom use is a vast topic and the following teaching reflection is focused on the textbook as a base for language teaching, in contrast with the potential of authentic materials.

At the beginning of the school year I needed to evaluate and choose textbooks for each one of the courses at our school. When analyzing different textbooks, the main framework I used was the approach and methodology of the textbook. Methodological factors were the main guidelines I used to evaluate the validity of the textbook. Topics and realia were secondary. One of the main aspects I paid attention to was the way in which language (grammar and vocabulary) is presented in the textbook. For example, I looked at whether or not grammatical structures are preceded by exposure to language in use, such as texts and activities oriented

at non-linguistic themes with the language elements implied in it. I also considered the elements of practice and whether or not students are given enough controlled practice of the grammar structures before they move to free practice and language use in freer speech. Also, the presence of tasks with non-linguistic goals was crucial because I perceived it as a necessity to activate the language taught. Methodology factors were pivotal.

Finally, I chose the Cutting Edge for most of my adult groups. As the course progressed, one of the lessons in the elementary/pre-intermediate group was designed around a grammar point. The aim of the instruction was to enable the students to use the Present Simple 3rd person singular forms of verbs correctly and fluently. It was supposed to be a speaking lesson with a non-linguistic task. The lesson was preceded by typical grammar lessons where students were exposed to texts with the desired grammar point in it. They had plenty of exposure to the language as I considered it a crucial factor. Practice activities followed to give students a chance to use the grammar point in controlled activities and to focus on the form.

For the following lesson I prepared a speaking task to activate the language and enable the students to use it freely. Students were first given a listening task where they focused on how others did the same task, so the students were given a base (Willis, 1996). They listened to a textbook audio recording where different people analyzed holiday course adverts and chose various courses for their friends, according to their friends' likes and dislikes. The following is an example of an extract from the text-script: *Maybe the sailing course is good for her because she likes spending time outside and she always goes swimming on Fridays.*

Students had a proper listening task where they had exposure to the language use and they also had a chance to analyze the language forms used by the speakers to complete the task. Next, the students were given the speaking task. They first read some course adverts. Then they listened to some textbook characters talking about their hobbies, likes, and dislikes. The aim of the task was for the students to decide on the best course for each character, as a group. As stated in Willis's framework (1996), the task had a non-linguistic goal, but was likely to activate the grammar point. During the task completion **I was surprised** by how reluctant my students were to complete the task and they weren't engaged in the task at all. I tried to prompt them, and I simplified the task by breaking it into smaller steps. For example, I asked the students to first list the likes and dislikes of each of the characters. Then I asked them to come up with one course for one of the characters and then to agree or disagree on it with other students. However, it did not change anything. My students were evidently bored and failed to engage in the task. According to my perception of the situation, the students failed to engage in the task because they did not see the point of

talking about some fake characters from the textbook. They seemed to find it pointless to choose a holiday course for people they don't know, or even for people that do not exist. As a teacher, I failed to take into consideration the fact that authenticity of classroom materials is a major motivational factor for ESL students (Dörnyei, 2001). I considered the methodological factors of textbook design over the authenticity of audio materials. I disregarded the fact that affect is as important as effective teaching methods in class (Arnold, 1999). In a spur of the moment, I adapted the speaking task and told the students to talk about their own likes and dislikes in pairs. Then they were supposed to choose a holiday course for one another and present their ideas for the class, instead of choosing it for artificial people from the textbook. I did this based on the assumption that personalizing content in the ELT classroom is crucial for language acquisition (Krashen, 1981). As a result of this change, the students were more eager to complete the task and seemed to have found the need to actually use the language in class. Therefore, such situation could carry a conclusion that authenticity of materials could be of higher value in the ELT classroom than effective methodological approach.

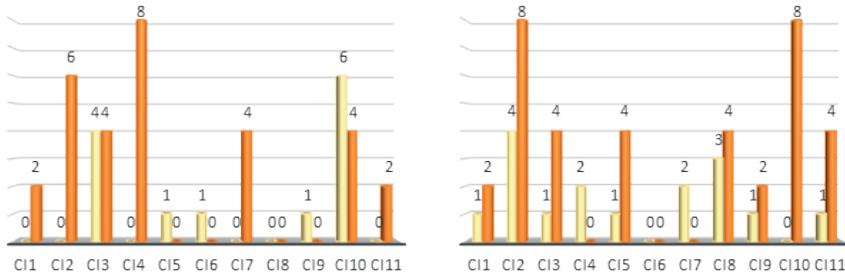
Factors responsible for such an unusual strength of emotional retrieval remain unknown, but it seems reasonable to speculate that her cultural and educational background, as mentioned earlier, played a role in forming quite uncommon perceptions of classroom realities.

The increased load of affective remarks towards the end of the CI series might be accidental if not related to the scale of fiascos T1 chose to diagnose in CI8, CI9, and CI10. These depicted her desperate yet vain attempts to maintain control over a class of eleven-year-old football players, full of overwhelming vitality, according to the teacher. A gradual change was observed in the character of those MTUs, though. Laconic lexical choices, which the instructor frequently used in the initial reports, such as *fail* and *failure*, were replaced now with the use of language that labelled her specific didactic behavior, for example *frantic decision*, *hysterical move*, *unnecessarily apologetic*. It might be that T1 reached a point in the study where she found the umbrella terms insufficiently defining.

Although it is undetermined to what extent the minimal emotional load of the descriptive and analytical parts of T1's reports was strategically regulated, information processing freed of affective tension gave the instructor an advantage to approach the selected incidents in a less cognitively distorted manner. In this respect, her diagnostic performance can be viewed as much more effective when contrasted with the distribution of affective MTUs in the reports of her beginner counterparts (Figures 3 and 4).

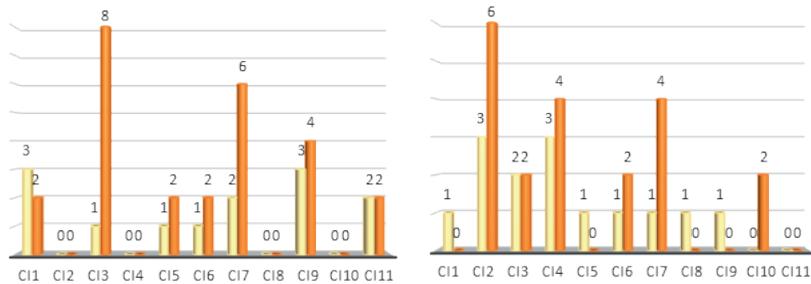
**Figure 3**

*T2's (Left) and T3's (Right) Affective Thought Units in Description*



**Figure 4**

*T2's (Left) and T3's (Right) Affective Thought Units in Analysis*

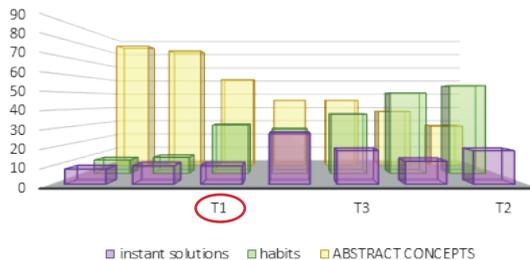


**Concept Building—A Source of Professional Orientation**

As discussed earlier, concept building constitutes the foundation for analytical operations within the diagnostic task. When examining classroom events, T1 regularly referred to general professional categories, including lesson planning, procedures, learners’ prior knowledge, comprehension check, and many more. In this regard, as illustrated in Figure 5, she ranked the highest among the beginner participants, and the third highest of all.

**Figure 5**

*Three Types of Learning Paths Identified for T1 vis-à-vis the Other Study Participants*



The instructor also made attempts to establish her own understanding of such aspects of the teaching/learning process as learner autonomy or accuracy/fluency duo. One outstanding example of framing a concept can be found in a report regarding a desperate act of the teacher tearing a young learner's test in front of the class in response to the boy's naughty behaviour. Recognized as highly turbulent and unprofessional, the incident caused the young practitioner to contemplate teacher authority. The following excerpt shows the verbalization of her reflective thoughts:

The lesson I learned was not to avoid injustice. It was an obvious piece anyway. I realized that the teacher is not only expected to register and respond to events in class, but also see her own behavior as a component of the lesson, which, when controlled, might actually achieve more than hysterical pedagogical moves. It does not belong to the category of planning and acting upon what has been planned, and hence can be easily overlooked. However, allowing the negative emotions to grow inside and vent eventually is like excusing myself as an imperfect human being yet not accepting others as such. The fact I am a teacher does not give me ultimate power. Quite the opposite, the master, by definition, has reached the point in development where he can accept much more than non-masters because he can see and understand more. Yes, on June 4th, 2015, I decided to become a master one day.

The passage demonstrates the teacher's ability to not only explicitly and meaningfully refer to such abstract constructs as injustice, controlled behavior, emotion release, or power, but also to incorporate them into the conceptual basis of her newly set professional goal—mastery. To see this ability surface in a young instructor's narrative proves her both a mature professional and an active learner.

## **Teacher 2**

### ***Reasoning Processes***

It was observed that in his 11 analyses of critical incidents, T2 effectively identified premises and built valid claims about three classroom situations, one of which appeared to be a highly-delicate multi-dimension issue. It concerned compromised honesty and integrity of the teacher after he (1) lied to a student about the meaning of an advanced lexical item he was not familiar with, (2) "died" of total embarrassment, (3) managed to recover emotionally, and (4) once more failed to admit his wrong when the student confronted him publicly in the following class.

The line of reasoning T2 verbalized in the CI10 exemplifies an impressive interpretative work, where the instructor proceeded along the time/space developments and contemplated the following unobservable cause-effect relationships within the situation:

- well-deserved humiliation;
- his ego behind the act;
- the perspective of the learner;
- potential damage inflicted on her;
- alternative scenarios;
- expectations held by different EFL ages and levels;
- teacher reputation.

The exploration of these constituents and their configurations, which covered 15 out of 33 meaningful thought units (MTUs) of the report, allowed T2 to point to his fear of being unmasked as incompetent as the major problem area and to conclude that it is the teachers' transparency, shortcomings in their professional knowledge included, that significantly benefits the learning process on both ends:

My university teacher used to say that transparency is a merit in the profession. It is not a shame not to know all the answers as long as you make systematic effort to learn. You are a person whose car would not start on a winter morning, who had a sleepless night because of heavy road works outside the window, who failed to remember about his mother's birthday, or who has just got engaged and brings tons of emotions to class. You are a person who knows things and does not know things. Your students should see you happy and unhappy. Your students will believe you then. This is what she used to say. This thought was like a blow on my head. How illuminating!

While in the majority of his CIs, T2 tended to apply heuristics and simplify both reasoning and judgment, the conceptual elaboration performed in this case, paired with the closing reflective thought above, demonstrated a remarkable degree of higher order thinking.

### ***Defining Experiences and Learning Outcomes***

The way T2 interpreted critical incidents and their outcomes attracted special attention during the data analysis. The instructor admitted his didactic failures in ten out of 11 CI reports. In general, his distressing experiences related to critical *feedback* he received from his superiors or students (these are symbolized in Table 3 as F-); disturbing *observations* he made in and outside the classroom (O-); and his compromising didactic *actions* (A-). For example, he chose to diagnose his misjudgment of learners' manners, ignorance of CEFR,

an immature response to personal needs communicated by an adult student, or a deep anxiety provoked by a conversation with a teenager's parent. The reports were abundant in emotionally loaded expressions which straightforwardly reported fault in his personal insecurities or inexperience. The instances range from: *I had no idea what structures in use draw a line between B1 and B2; I found myself in trouble; I blushed like a teenage boy; I felt so embarrassed and I was angry with myself; to I was making fool of myself.*

**Table 3**

*The Occurrence of Positive and Negative (-/+ ) Incidents in T2's Reports Including Actions, Observations, and Feedback (AOF)*

	CI/1	CI/2	CI/3	CI/4	CI/5	CI/6	CI/7	CI/8	CI/9	CI/10	CI/11
T2	F-	F-	A-	A-	A-	A-	O-	A-	A-	A-	A+

In seven of these cases, though, the teacher pictured positive outcomes and new habits he developed in the wake of highly upsetting occurrences. An illustrative example is his CI11, which reveals how the instructor's complete dependence on the textbook in lesson planning (1) stopped him from adjusting the lesson content to his students' interests and prior knowledge, (2) provoked their unfavorable reactions, and (3) forced the teacher to spontaneously modify the in-class activities. T2 realized that it was a huge mistake to think that *a meticulously planned chapter in the book will do the thinking for us* and that *both recommended ideas and our own designs must be approached critically unless we think of teaching as a source of easy money*. Alongside, he was more than happy to discover that he was able to fix the problem after *the learners' rolled eyes opened his*.

It is unidentified whether the realization that alternative didactic choices could bring more effective learning outcomes did amend the teacher's mindset and actions permanently. Still, his analytical thought processes could denote the contextual mode of reflection, which, as advocated by Taggart and Wilson (1998), examines the relationship between how things work in real life and how they presumably should work. Attention redirected to the system of knowing potentially benefitted the young teacher in that he initiated the cognitive activity which aimed to realize his objective—adaptation of behavior (Zimmerman & Schunk, 2011). This also presupposes an open-minded approach of the teacher to his didactic decisions and their assessment.

It is true that the study navigated the participants towards emotionally loaded events in their classroom practice as the content for systematic inquiry; however, they all had absolute discretion as to how their considerations were handled. T2's (sub)conscious choice to see unpleasant experiences as an

impetus for improvement and encouraging feedback for future developments indicates that the practitioner's perceptions are an integral part of information processing and learning, which is consonant with Golombek and Johnson's (2004) research findings emphasizing the catalytic role of attitude in teacher professional growth. T2 steered his mental processing from his current didactic understandings towards more expert cognitions, namely, informed assumptions about FL teaching and learning that might assist his problem-solving and decision-making processes in the future.

### Teacher 3

#### *Controlled Search for Workable Solutions*

One of T3's CI reports regarded methodological concerns she had while teaching in a local state school. The problems the instructor identified within the first few months of service were the following:

- she “had to” use rigid and unapproachable grammar terminology to present the teaching material to her young learners;
- she established insufficiently clear lesson objectives;
- she handed in the inept format of homework (ex. 1, 2, 3/p. 7 Workbook).

Her deliberate search for more effective alternatives took a year and involved participating in conferences and studying relevant literature. She consulted her experienced fellow teachers as well but found their input rather useless due to their “conservative and outworn views” on state-school FL instruction. The teacher's exploratory efforts resulted in a re-discovery of formative assessment, which prompted her to revolutionize her conduct. She personalized lesson contents, customized class routines, employed the “Can Do” strategy for defining learning outcomes, and implemented a creative idea of “Revision Jar” for short consolidation-oriented activities the kids enjoyed doing on a regular basis.

What can be justifiably considered as a symptom of expertise in T3's experience is her responsive attitude to what she recognized as a didactic challenge. The fact that she was committed to tax herself and engage in methodological inquiry might be called *early idealism*, which Maynard and Furlong (1995) defined as increased eagerness among novice teachers to understand and improve their practice. She might as well demonstrate disposition to maximize processing operations on the existing models of situations so as to transform her professional knowledge. Her active investment of cognitive resources in problematizing and redefining didactic tasks is a distinct expert quality.

#### *Formulating Critical Judgments*

The same novice instructor was observed to make four attempts at formulating critical judgments within the scope of 11 reports (Figure 6). One of them

demonstrates an exceptional transparency of her diagnostic effort. It regards the concluding remarks about the reprimand she gave a kid for highlighting content in the notebook. By order of the teacher, the use of colours was strictly limited to her written feedback, so the girl violated a cardinal class rule. The pupil's explanation that colours helped her study made the teacher realize how doubtful was the validity of the norm she excitedly applied to her classroom. Even more importantly, she identified that the source of her tacit conceptualization was the approach adopted by her own teachers, which she thoughtlessly replicated. Her words lucidly illustrate that the incident brought the values which prompted her behavior to her attention and critical examination:

Thanks to this situation, I came to my senses. It made me realize that I set the rule which would make my life easier (while checking their notebooks) and not theirs. It was totally unreasonable and not well-thought. It might have been because when I was a student my teachers used to say: *Red is a color for teachers!* Nobody dared to disobey this command. I might have subconsciously fallen into a trap of setting similar principles. Rules are extremely important but only when they serve a didactic purpose. In this case, the principle was pointless. The student gave me a lot to think about. I spent days pondering over her response: BUT IT HELPS ME...

The novice teacher successfully navigated her mental work towards a critical judgment by recognizing and evaluating the standards upon which she acted. Her mental effort resulted in a transformed understanding of the role of rules in the FL classroom.

**Figure 6**

*The Occurrence of the Four Kinds of Judgments in the Novice Teachers' CI Reports*

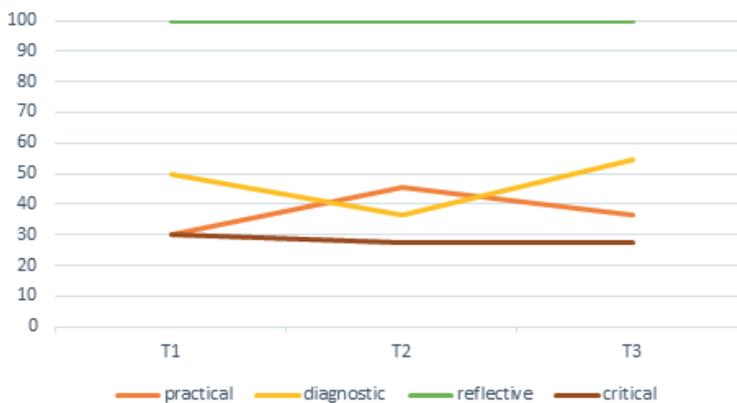


Figure 6 shows that all of the inexperienced study participants attempted to go beyond instant workable solutions to the problems they encountered (red line) and recognition of their emotional responses to these problems (green line). While these types of professional judgments involve rather limited processing power, the justification of didactic choices (yellow line) and verification of the validity of the underlying principles require sound logical reasoning. T3 and her beginner counterparts' reports provided evidence of controlled mental work on their existing knowledge, which counts as diagnostic effort as well as readiness for further professional growth.

## Discussion

The characteristics of good diagnosticians were identified in inexperienced teachers of English in the study of diagnosing critical incidents. The qualitative and quantitative analysis of empirical data showed that the three beginners were intellectually capable of steering their attentional processes and generating various types (cognitive, affective, imagery) of mental representations of problematic situations. They stimulated multiple sources of knowledge, professional categories, and abstract constructs in search for a better understanding of these situations. Finally, they established causal relationships between events and made effort to articulate critical feedback for their future didactic reference. The collected data is valid as it provides evidence on the existence of qualities in the novice participants that enable them to successfully execute command over their own cognitions. The findings extend the previous research by Gatbonton (2008) in that they point at overlapping features among experienced and inexperienced practitioners and support Sternberg and Horvath's (1995) hypothesis about the potential variances in the profiles of FL teachers, including the facility in novices to effectively diagnose problems, that is, to optimally represent, categorize, conceptualize, and define disturbing classroom events.

The major limitation of the study regards its scope and hence insufficient amount of empirical material to confidently establish patterns/regularities in the participants' reasoning. This prevents generalizations and theory building about cognitive faculties of beginner instructors. Also, doubts might be raised about written recall as a reliable research procedure due to its subjectivity. Indeed, the process of thought verbalization is biased to a degree, yet it remains one of very few alternatives to study teachers' cognitions. Discourse as personal as practice-based accounts communicates how a conscious human being interacts with the unexpected, responds to stimuli, uses schemata to rationalize thoughts and actions, makes elements of the story fit together, and adopts a subjective

stand on (professional) life (Goldie, 2000). In this sense, it operates as a consistent instrument for externalization of the unobserved dimension of instruction, which legitimizes observations and interpretations it prompts. Besides, the conditions under which the participants performed the diagnostic task could not be more natural. The teachers referred to occurrences that constituted their customary classroom practice, including planning, instructing, problem-solving, and reflecting. The situations whose meaning they chose to understand with the aid of structured analysis reveal the reality that researchers do not have access to.

Reasonably, further work is encouraged to fully address the challenging questions about the levels of expertise in novice teachers. Numerous aspects of their behavior should be placed under investigation. It is yet to determine, for example, what psychological factors can successfully mediate the development of mechanisms for entry-level instructors to enhance cognitive processes in light of their deficient classroom experience. Equally fascinating could be comparative studies on larger groups of pre-service teachers engaged in narrow-focus cognitive tasks, for example material design, which can result in recognition of strategies “expert” (good) trainees implement in action. The significance of such research effort lies in the fact that professional competence detected in learners should receive adequate response from teacher trainers.

Practical implications for TEFL education arise from the results yielded by this study. Diagnostic abilities, which essentially include search for, application, and evaluation of relevant information in both the external and internal environments, can be successfully enhanced in teacher training programs through simulation and scaffolding. Although it is recognized that higher order processing is largely dependent on the stability and distinctiveness of the accumulated knowledge, effectively navigated structured practice of analyzing what choices the trainees make, why, and what consequences they might have for the learners can serve as a tool to promote the pursuit of broader understanding of the teaching/learning process. At the same time, diagnosing problems as a hands-on rather than conceptual dimension of teacher education might result in teachers-to-be surfacing and exploiting their cognitive and affective strengths and weaknesses. As Dörnyei (2001) claims, teacher learning is largely based on context-confined feedback, which often determines one’s efforts to develop professionally. The influence of the training stage should be then both formative and stabilizing as it offers beginner instructors not only sheltered conditions to make, realize, and rectify didactic mistakes, but also a unique opportunity to build a sense of teacher identity that draws on observed/detected capacities, not deficiencies.

## Conclusions

The concept of expertise in teaching has been challenged in the literature, especially the assumptions that the professional growth is linear and that accumulated experience provides a secure foundation for excellence (Bereiter & Scardamalia, 2003; Tsui, 2005). Non-experts are not uncommon among EFL teachers with several years of classroom conduct. Neglected language skills, technological illiteracy, or fossilized instructional practices are just a few problems that can easily go unnoticed under the label of “seniority.” At the same time, intellectual vigor, emotional maturity, informational resourcefulness, high perceptiveness, strong self-awareness, and other attributes that entry-level teachers potentially bring into the classroom on top of their professional training are overlooked. It is important, therefore, that an objective scholarly approach to didactic competence examines all its diverse manifestations, including outstanding performance of novices.

The paper postulates that it is justifiable to refine the benchmarks against which expertise in teaching is measured and to recognize that cognitive distinctions exist within, not only among, practitioners. A representation of excellence should essentially embrace the interaction of constructive and destructive forces behind teacher learning at every stage of their career. This includes the search for and acknowledgement of diagnostic abilities in novices, whose professional development might be influenced in a degree by recognition they receive from early years in the profession.

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Ewa Tołoczko

## **Diagnostische Kompetenzen von angehenden Lehrkräften**

### Zusammenfassung

Im vorliegenden Beitrag wird die Frage der diagnostischen Kompetenzen im Englischunterricht im Hinblick auf die Reaktionen angehender Lehrkräfte auf kritische Vorfälle im Klassenzimmer behandelt. Der erste Teil beleuchtet die Hauptkomponenten des diagnostischen Prozesses, wobei ihre universellen, nicht spezifischen Eigenschaften in den Vordergrund gestellt werden. Die nachfolgend beschriebene Fallstudie bestätigt auf Grundlage einer Analyse von Berichten über kritische Vorfälle, die von drei angehenden Lehrkräften erstellt wurden, dass der Mangel an praktischer Erfahrung und somit an etablierten kognitiven Schemata einer effektiven Definition, Interpretation bzw. Bewertung von herausfordernden Unterrichtssituationen nicht im Wege steht. Die angeführten Beispiele für das beobachtete Verhalten der Probanden, die sich auf ihre konzeptionellen Bemühungen, didaktischen Entscheidungen und formulierten Bewertungen beziehen, manifestieren die Merkmale effektiver Diagnostiker. Abschließend kommt die Autorin zu dem Schluss, dass das derzeitige Verständnis von Professionalität im Englischunterricht, das normalerweise erfahrenen Praktikern diagnostische Kompetenzen zuschreibt, revidiert werden muss. Die Erforschung von professionellen Einstellungen und Handlungen bei angehenden Lehrkräften kann indes dazu dienen, ihr didaktisches Potenzial freizusetzen und dadurch im Allgemeinen die Qualität des Unterrichts zu verbessern. Die Lehrerausbildung sollte daher ein erweitertes psychologisches Modul miteinbeziehen, dessen Aufgabe es wäre, das eigene erfolgreiche und erfolglose Handeln im Unterricht zu beobachten und mit dem verfügbaren Wissen zu analysieren.

*Schlüsselwörter:* angehende Lehrkräfte, diagnostische Prozesse, kritische Vorfälle, kognitive Prozesse



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## **“Three months on, I still sound like an Anglophone”: Tales of Success and Failure told by English and French Tandem Partners**

### Abstract

This paper reports on two ways in which success and failure can be operationalized and quantified in a non-institutional L2 learning context such as language tandem setting. We draw on the SITAF database, where we gathered 25 hours of video-recorded conversations held by 21 pairs, each consisting of a native speaker of English and a native speaker of French. The tandems performed collaborative tasks in both languages, thus giving each participant ample opportunity to be both the ‘expert’ and the ‘novice’ (learner) part of the dialogue. The tandem partners met regularly and autonomously outside of the recording sessions, and making progress in their L2 was one of their declared goals. Two possible measures of success in achieving this goal are: (1) the quality and quantity of learner uptake which followed the expert’s corrective feedback (CF) during the recorded conversations. Significant differences between the two L1 groups were observed: while 52% of the CF given by the native French speakers met with total uptake, over 52% of the English CF generated no uptake at all; (2) the participants’ own narratives of progress, as both the experts and the learners, obtained through questionnaires they filled out at the end of the program. Our study aims to contribute to the discussion on the stakes of successful L2 informal learning (with a focus on the acquisition of L2 pronunciation) by adopting a perspective which combines learners’ spoken output data and learners’ perceptions of their own language learning activity.

*Keywords:* corrective feedback, tandem learning, uptake, phonetic development

Tandem Learning is a type of non-formal<sup>1</sup> learning environment which is often used for its potential to promote L2 linguistic and cultural acquisition. More specifically, in face-to-face tandem, L2 (foreign or second language) learners from two different L1s (first languages) collaborate mainly through spoken interactions in their two languages in the hope of developing their L2 language and (inter)cultural skills (Brammerts & Calvert, 2003). The benefits of tandem learning identified by previous research include improving communicative competence, developing intercultural competence, increasing motivation and developing confidence in speaking a target language (see Wakisaka, 2018, for a recent summary). Tandem learning allows for reciprocity and overall symmetry in the relation between the native speaking (NS) and the non-native speaking (NNS) partner, as both participants help each other out at different points in the tandem exchange. Indeed, both participants forming a tandem pair take on two complementary roles: the position of L2 learner or novice when speaking in their L2, but also the role of the *relative* expert when the conversation switches to their L1. In the past few decades, various problems associated with the notion of native speaker have been raised by numerous scholars (e.g., Jenkins, 2000; Escudero & Sharwood Smith, 2001; Dewaele, 2018; Slavkov et al., 2022), with Paikeday (1985) describing it as “a convenient fiction.” In this paper, we make use of the simple labels NS and NNS precisely for the sake of convenience, since they well reflect the roles performed by the two partners, and they are the terms associated with the historical tenets of tandem partnerships (Brammerts & Calvert, 2003; O’Rourke 2005). Moreover, these are the statuses that each participant identified with when entering the tandem program (see the Methods section), declaring themselves as a NS of English and a NNS of French, or vice versa. However, we do not subscribe to the idealized views that are sometimes attached to these concepts. Importantly, we do not take native speakers to be the sole proprietors of L1 language expertise or competence; we consider them to be *relative expert* users of their first language (and relative experts on some aspects of their L1 cultures), and we do not assume they have a full grasp of their L1. Finally, we do not equate native speakership with monolingualism, as most tandem participants in our study are indeed multilingual users.

The development of language skills in the L2 is an explicit motivation for teachers to organize such tandem programs and for their L2 learners to take part in them. For example, O’Rourke (2005, p. 434) presents tandem learning as “an arrangement in which two native speakers of different languages communicate regularly with one another, each with the purpose of learning

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<sup>1</sup> Schugurensky (2000) and Cedefop (2014) propose non-formal learning as a half-way house between formal learning (higher degree of explicitness in learning/teaching and in institutional integration) and informal learning (mostly implicit, disconnected from educational institution and generally unintentional from the learner’s perspective).

the other’s language.” Yet, while improving one’s L2 language skills is a set objective for participating in a tandem program (and often an explicit expectation expressed by learners), it is not always easy to attest that it is indeed the tangible outcome of tandem learning practice. If tandem learning favors actual L2 development, it would be interesting to find indication of this development in tandem speech data. Our research analysis thus revolves around the possible evidence and measures of L2 acquisition success in the course of face-to-face tandem interactions. To that end, we will focus on the fruitful cooperation between the L2 learner and their NS interlocutor in error treatment sequences such as: NS’s Corrective Feedback > NNS’s uptake. We will therefore investigate interactional sequences involving learner uptake following the NS’s corrective feedback, showing how the two participants’ roles go hand in hand, and putting the learner’s (re)active role in the limelight. We also want to connect this to the metacognitive dimension of representations of success or failure expressed through the learners’ introspective and declarative metadata. Since we have two different language-culture profile participant groups (the Francophones and the Anglophones), it will also be interesting to investigate if the two groups show similar uptake patterns, both in their actual productions and their representations.

The research questions our study aims to address are:

- Do interaction speech data and learners’ introspective data align in the pictures they give of L2 learning success during tandem exchanges?
- Can differences be observed between the two language-culture groups in these two measures of learning success (uptake in speech and learner representations)?

## Literature Review

Since we are interested in looking at the language features effectively learnt by NNS participants thanks to their NS partners’ input during their tandem interactions, it is necessary to first consider how previous researchers have operationalized the key concepts for our analysis such as *corrective feedback (CF)*, *learner uptake*, and related terms such as *modified output* and *repair*, and assessment of successful L2 development. As a foreword, we deem it important to stress that most of these concepts were initially posited and described for the fairly “traditional” learning context of formal language instruction and not for the semi-naturalistic, non-formal setting of tandem exchanges between L2 learners, where a teacher is absent. Classroom interactions between the teacher and the L2 students have long framed the theoretical perspective and typol-

ogy for describing such phenomena (e.g., Lyster & Ranta, 1997; Gass, 2003; Mackey, 1999, 2006; El Tatawy, 2002; Sheen, 2006), although some more varied learning contexts are now being explored (Nassaji & Kartchava, 2021). Some methodological adaptations will necessarily have to be made when transferring previous categories and typologies (which, as Lyster and Ranta (1997) explain, were conceptualized for the needs of a particular database) into the specific learning environment of non-informal and semi-naturalistic NS-NNS tandem interactions (see our Methods section).

### **Corrective Feedback (CF)**

Corrective feedback is synonymous with the term *negative evidence*, that is “the type of information that is provided to learners concerning the incorrectness of an utterance” (Gass, 2003, p. 225). One of the pivotal pieces of research on corrective feedback is that proposed in Lyster and Ranta (1997), where the authors define seven categories of CF moves at the disposal of language teachers: (i) explicit correction, (ii) recast, (iii) clarification requests, (iv) metalinguistic feedback, (v) elicitation, (vi) error repetition, (vii) multiple feedback (combination of two or more of the above). Recasts can be defined as “the teacher’s reformulation of all or part of a student’s utterance, minus the error” (Lyster & Ranta, 1997, p. 46). They are reported by many studies to be the preferred CF strategies, although their corrective power or effectiveness is often contested (Lyster & Ranta, 1997; Lyster & Saito, 2010; Sato & Loewen, 2018; Saito, 2021). This is especially the case when compared with CF moves which are more explicit (e.g., explicit correction or metalinguistic comments), or through which the learner actively generates the target form instead of relying on the teacher’s provision thereof (elicitation, error repetition, clarification requests, which have been described as output-prompting).

### **Learner Uptake, Modified Output, and Repair**

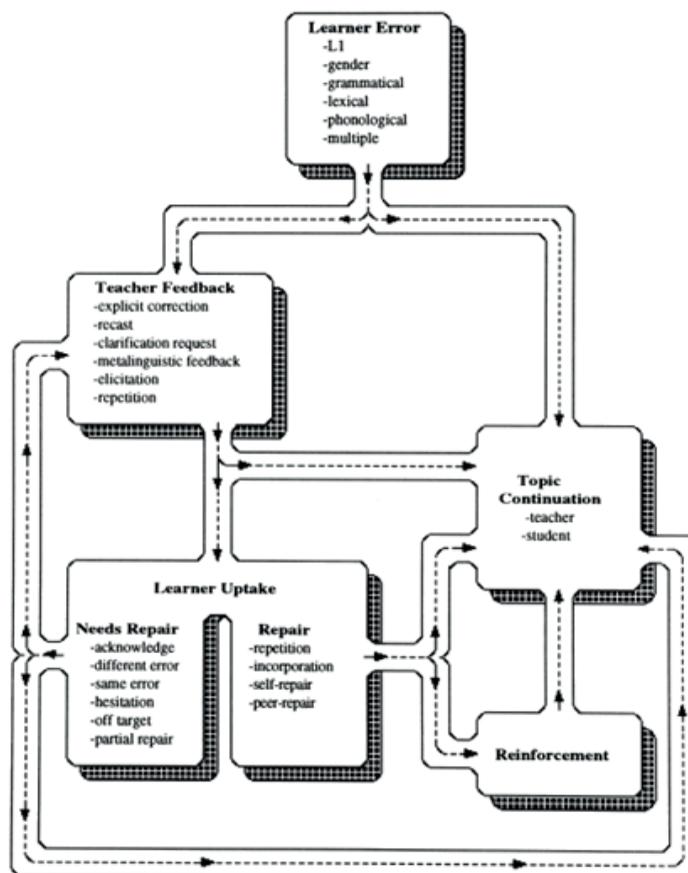
Lyster and Ranta (1997) define uptake as “a student’s utterance that immediately follows the teacher’s feedback and that constitutes a reaction in some way to the teacher’s intention to draw attention to some aspect of the student’s initial utterance (this overall intention is clear to the student although the teacher’s linguistic focus may not be)” (Lyster & Ranta, 1997, p. 49). This phenomenon can also be referred to as “Other-Initiated self-repair” by other authors (e.g., Schegloff, Jefferson, & Sacks, 1977; as cited in Lyster & Ranta, 1997). However, it does not cover cases where learners spontaneously repair their own speech without being prompted by their interlocutor (self-initiated self-repairs, also

called self-corrections). They seem to put absolute (albeit momentary or local) success at the center of their distinction between two key categories: *repair* (= learner’s correct reformulation of the initial error after CF) and *needs-repair*. Lyster and Ranta define *repair* as referring to “the correct reformulation of an error as uttered in a single student turn and not to the sequence of turns resulting in the correct reformulation; nor does it refer to self-initiated repair” (Lyster & Ranta, 1997, p. 49). Their other main category, *needs repair* (non-conformity with the target form), is rather large and encompasses many different situations ranging from: simple acknowledgement, different error, same error, hesitation, off target, partial repair (see the reproduction of the error treatment sequence in Figure 1).

In Lyster and Ranta’s model, however, it is unclear in what way learner reactions such as acknowledging, repeating the same error, hesitating, producing an off-target response reveal that for the L2 learner “the teacher’s overall intention is clear” as these responses could also be found in normal, conversational/discursive moves (backchannelling for example).

**Figure 1**

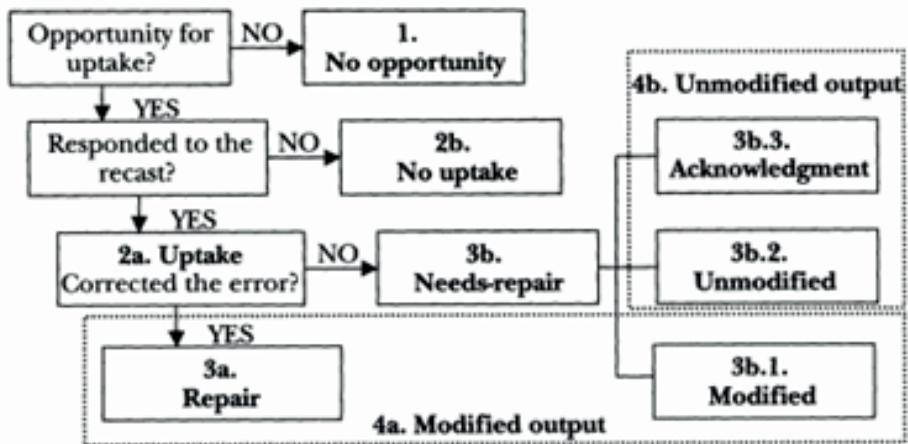
*Lyster & Ranta’s (1997, p. 44) Error Treatment Sequence*



Egi (2010) later emphasized that not all types of learner uptake responses are equally predictive of L2 development. Sharing the concern expressed by Ellis, Basturkmen, & Loewen (2001) for investigating what may constitute “successful uptake” or not, she therefore refines Lyster and Ranta’s typology by dividing their umbrella *needs repair* category into three subcategories: *needs-repair modified*, *needs-repair unmodified*, *needs-repair acknowledgment*. She also stresses the importance of regrouping uptake responses around the key distinction between *modified output* (which she defines, after Mackey 2007, as “generally entail[ing] the learner’s modification of a problematic form that invited feedback”; Egi, 2010, p. 2) and *unmodified output* (absence of modification of the problematic form by learner in the case of *needs-repair unmodified*, *needs-repair acknowledgment*). Her 4a/4b distinction level is reproduced in Figure 2.

Figure 2

Egi’s (2010, p. 8) Coding System



### Assessing Success in L2 Learning through CF-Uptake Sequences

Some studies have suggested a link between (certain types of) uptake and L2 learning (Lyster & Ranta, 1997; Egi, 2010). However, the analysis of uptake responses cannot necessarily be taken to be a direct measure of L2 development. The relation between learners’ uptake responses and their learning outcomes is fairly complex and indirect. Egi (2010, p. 4) summarises this methodological issue with the following disclaimer:

The use of immediate uptake as a learning measure may be called into question in light of various discursual constraints on its occurrence, a weak (or unclear) relationship between immediate uptake and SLA, delayed responses, and indications that the effects of feedback may be delayed. Still, there are some theoretical arguments and empirical evidence that suggest a potential link between learner responses and L2 development.

Quality of learner uptake is therefore important to take into account when determining its potential for conducing to learning, especially since the gradations in uptake quality are revealing of “varying degrees of cognitive effort involved in the production of uptake, and they may be differentially related to learning outcomes” (Egi, 2010, p. 5).

In line with the Noticing Hypothesis (Schmidt, 1990; Mackey, 2006), the role played by learners’ “noticing of” or “paying attention to” their interlocutor’s CF and to the mismatch between their erroneous output and the target-like form is posited as an essential factor ensuring L2 acquisition. Egi (2010, p. 2) summarizes this as follows: “Learners’ responses often have been viewed as a cognitive window to their mental activities; a number of SLA researchers have interpreted learners’ responses as a signal that they have noticed feedback.”

Researchers like Lyster and Ranta (1997), Mackey, Gass, & McDonough (2000), Egi (2010) have used the stimulated recall technique to investigate learner post hoc interpretation of CF and motivations behind their uptake responses, for example to explore their ability to identify the corrective intent, identify the correct form and the mismatch with their erroneous output. For instance, Egi (2010)’s participants watched the video clips of their interactions with the L2 teacher and gave introspective interpretations for their responses to CF. This technique led these authors to reveal the relative ineffectiveness of recasts for prompting successful uptake, in particular because recasts are too implicit and learners therefore often miss their corrective purpose, as evidenced in their post-test declarations.

Another traditional technique for gauging L2 development is to have learners perform language tests before and after a controlled intervention or treatment carried out by a teacher, often in comparison to a control group. This technique is particularly adapted to laboratory experimentations or a classroom setting but it is less suited to semi-naturalistic settings such as NS-NNS informal conversations.

## Methods

### The SITAF<sup>2</sup> Corpus

A detailed presentation of the SITAF project's experimental design (tasks, participants, instructions, questionnaires) is offered in Horgues and Scheuer (2015). In total, our corpus consists of around 25 hours of video-recorded, face-to-face interactions held by 21 pairs of native-French speaking and native-English speaking tandem participants.

### *Speakers*

The participants were all students enrolled at Sorbonne Nouvelle University (France), aged between 17 and 22. None were balanced English-French bilinguals.<sup>3</sup> The 21 native French-speaking students (coded F01 to F21) were undergraduate English language specialists for the most part. The 21 English-speaking students (coded A01 to A21) were international mobility students who came from various English-speaking countries (USA, Canada, UK, Ireland, and Australia). Each participant declared either English or French as their L1 in the registration questionnaire. For convenience' sake, we refer to their partner's L1 (French or English, as appropriate) as their L2, even though it could actually be their L3 or L4.<sup>4</sup> Four Anglophones declared being early simultaneous bilinguals in a language other than French (one English/Spanish, one English/Lebanese, one English/Catalan, one English/Irish). Only one Francophone declared being an early bilingual (French/French creole). Most participants also reported having learned another additional language (e.g., Chinese, Spanish, Italian, German, Hebrew), so these tandem participants were highly multilingual users overall.

### *Sessions and Tasks*

The speakers were recorded on two occasions: in February (Session 1) and again in May 2013 (Session 2). In between these two recording sessions, the tandem pairs met autonomously for weekly tandem conversations (12 meetings on average; not recorded). In the two recording sessions, they performed the same three tasks (in the two languages randomly sequenced). Two of these tasks were communication activities (semi-spontaneous speech): Game 1 (*Liar-Liar*, a storytelling activity where the L2 learner tells a story containing three lies that the

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<sup>2</sup>*Spécificités des Interactions verbales en Tandems Anglais-Français* [Characteristics of English/French spoken tandem interactions].

<sup>3</sup>None of them had a parent who was a native speaker of the L2, or had been to an L2 immersion school in their childhood.

<sup>4</sup>That, however, was rare: the language was an L3 for two Anglophones and one Francophone, and an L4 for one Anglophone.

NS interlocutor has to identify by asking questions) and Game 2 (*Like Minds*, a debating activity where both participants share their opinion on a potentially controversial subject before determining the degree of like-mindedness between them). The third activity was a reading task (text: *The North Wind and the Sun* read in L2 English and in L2 French). The reading by the NNS was explicitly monitored in Session 1 (i.e., the NS partner was invited to intervene to help the NNS improve their reading; this collaborative sequence was followed by a second reading of the passage by the NNS); and in Session 2 the NNS performed a simple (unmonitored) final reading of the same passage.

### **Analysing Relative Uptake Success in the SITAF Corpus**

For the sake of this particular study, we analyzed CF-uptake sequences (uptake moves by the NNS learner following each corrective feedback instance performed by their NS interlocutor) in the semi-spontaneous tasks of the SITAF corpus (Game 1 and Game 2 in the two languages, in the two recording sessions). This represented about 15 hours of audio-visual speech analyzed for this study. We also analyzed CF in the reading task (two sessions; focus almost exclusively on pronunciation) for comparison. Our analysis of CF in this corpus (quantity, focus, strategies) was presented in previous publications (Horgues & Scheuer, 2014; Horgues & Scheuer, 2018; Scheuer & Horgues, 2020).

In these analyses, we defined CF as the production of verbal negative evidence by NS participants in reaction to a non-target-like form (or absence of form) produced by their NNS partner, thus making it more target-like. We also draw on Lyster and Ranta (1997)'s typology for CF moves, which we adapted, as some strategies were never used by the NNS in our corpus (certainly because they seem to be the prerogative of professional language teachers and would create a sense of hierarchy, something that tandem participants generally want to avoid). For example, we discarded categories which are irrelevant to our specific interactional context as they are absent, that is, metalinguistic comments without provision of the correct form, elicitation, error repetition. We therefore simplified Lyster and Ranta's categorization around four main CF types: (i) recast, (ii) clarification request, (iii) explicit correction and/or metalinguistic comment, (iv) mix (equivalent to what they termed “mix”).

We also relied on Lyster and Ranta (1997)'s approach to uptake as the NNS's verbal response following corrective feedback provided not by the teacher but by the NNS tandem partner. However, unlike these authors, we do not consider that any possible type of uptake response is informative for exploring L2 developmental potential. We believe this is particularly important when looking at the acquisition of L2 phonetics and phonology, where practice at pronouncing the target sound form plays an essential role in learners' internalization

of the L2 auditory and articulatory gestures. More precisely, we consider that categories such as “acknowledgement,” “repetition of same error,” “new error,” “hesitation,” and “off-target” are responses which do not attest clearly enough that the learner is reacting to their interlocutor’s corrective intent. We therefore labelled “repetition of the same error” or “new error” or “off target” as *failed uptake* (Egi’s *unmodified needs-repair*). In the absence of explicit verbalizing of a modified output attempt, we grouped cases of simple “acknowledgment,” “hesitation,” “no response” under the umbrella category *no uptake*<sup>5</sup> since we consider there is no tangible (i.e., verbal) evidence that the learner has grasped the corrective function their interlocutor’s feedback had. Our perspective is therefore more in line with Egi’s (2010) key distinction between *modified output* and *unmodified output*. Indeed, we consider that the learner’s attempt at modifying their output signals that they have somewhat grasped the didactic function of the NS’s corrective feedback (as opposed to a simple conversational function) and that their attention has somewhat been drawn to the gap between their initial (erroneous) output and the target form.

Thus, we will concentrate on uptake moves which clearly reveal some verbal attempt, by the NNS learner, at modifying their erroneous output, as signaled by corrective feedback from their NS interlocutor. Whether the corrected form is first produced by the NS (through input-providing CF such as recast or explicit correction, for example) or emerges from the NNS (student-generated repair for Lyster & Ranta, 1997) does not matter in our treatment of what counts as noteworthy uptake. Whether their attempt at modifying their output actually results in conforming with the target form completely or incompletely is not a determining factor in our general treatment of uptake cases either. In a bid to obtain a more accurate picture, however, we do distinguish between *partial uptake* (uptake responses which result in an imperfect correction towards the target or model form where only one feature is corrected but not others, equivalent to Lyster and Ranta’s *partial repair*, or Egi’s *modified needs-repair*) and *total uptake* (where the modified form represents a reasonably complete correction in conformity with the target form; Lyster and Ranta’s and Egi’s *repair*). Notably, we discarded some of Lyster and Ranta’s categories (*peer-repair* or *topic continuation by peers*) as they are irrelevant in the context of a NS-NNS dyadic interaction, which is very different from the classroom setting where the L2 learner is surrounded by fellow students.

Here is the uptake typology we have used in our analysis of the NS-NNS informal interactions in the SITAF corpus:

- i) *Total uptake*: reasonable conformity to the target form given by the NS expert, for example:

<sup>5</sup> The previously mentioned authors reserve the term *no uptake* for cases where there was no response, or there was a change of topic, on the part of the learner. They thus include simple acknowledgements—labelled *needs repair*—in the general uptake counts.

(NNS) *And I fall* [talking about a past event]

(NS) *Oh, you fell!*

(NNS) *Yeah, I fell.*

- ii) *Partial uptake*: only part of the correction proposed by NS was implemented by the learner, for example:

(NNS) ... *à Madrid, dans le centre du, de Espagne, de l'Espagne* ... [in Madrid, in the centre of the (M.SG), of Spain, of the (F/M.SG) Spain]

(NS) *au centre de l'Espagne* [at the centre of the (F/M.SG) Spain]

(NNS) *oui au centre au centre d'Espagne* [yes at the centre at the centre of Spain].<sup>6</sup>

- iii) *Failed uptake*: NNS reacted to CF but failed to produce the model form, as in:

(NNS) *On meadow* [\*'mi:dəʊ], *big meadow* [\*'mi:dəʊ], *so when you're...*

(NS) *A meadow* ['medoʊ]?

(NNS) *Yeah, sort of meadow* [\*'mi:dəʊ], *not mountain, but...*

- iv) *No uptake*: no observable verbal reaction to the CF, as in:

(NNS) *J'ai dansé sur le table avec autres* [I danced on the (M.SG) table with others].

(NS) *Sur la table* [On the (F.SG) table]

(NNS) *Oui, c'était, c'était fou, mais...* [Yes, it was, it was crazy, but...].

The above examples also illustrate the variety of language areas that were targeted in the native speakers' corrective interventions: morphosyntax (grammar), vocabulary, pronunciation, or any mix of the above.

We are primarily interested in uptake emerging in the direct sequence following feedback provision (subsequent speech turns). However, uptake success may also be recorded in terms of permanency and stability over time, which we could only analyze through the course of one conversation, or by comparing the two recording sessions, separated by the three months' interval ((non-)permanency of uptake, delayed uptake effects). The analysis of the various instalments of the reading task in the corpus allows for the comparison of how, over time, the same (controlled) speech material is produced by the NNS following their NS partner's CF provision (comparison between the first and second reading in Session 1, and the final reading in Session 2). However, our experimental protocol does not permit the application of this systematic longitudinal comparison to the semi-spontaneous (uncontrolled) speech data (Games 1 and 2). Indeed, the re-occurrence of any problematic language issue at different points in time was only incidental and this un-systematicity prevents any quantitative analysis of the temporal aspect of uptake in this portion of the corpus.

<sup>6</sup>The NNS reproduces the correct preposition (*au*, and not her initial incorrect one, *dans*) but omits the definite article *l'* (which, in French, blurs the F-M gender distinction before a word starting with a vowel, such as *Espagne*).

## Exploring Learners' Tales of Success and Failure through their Written Questionnaires

Upon finishing recording Session 2, all tandem participants completed two written questionnaires (see the English version in the Appendix). The general questionnaire aimed at eliciting introspective declarative data on the learners' impressions about their tandem experience in general (benefits, corrective feedback practices and preferences, self-assessed progress). The second questionnaire focused on their representations of phonetic issues related to their tandem practice (attitudes towards and communicative impact of foreign accent, phonetic development, etc.).

In the general questionnaire, questions 15 and 16 (quoted in full in the Appendix) will be of particular interest when exploring the participants' representations of success and failure in their L2 acquisition through tandem practice. They concern, respectively, self-reporting the perceived degree of improvement in different domains, and self-reporting the evolution in speaking confidence. In the Pronunciation and Tandem questionnaire, question 19 is particularly revealing as it provides information about the participants' representation of success or failure in relation to their L2 pronunciation during tandem exchanges.

It is worth noting that, contrary to other types of studies mentioned before (e.g., Lyster & Ranta, 1997; Egi, 2010; Mackey et al., 2000), we could not organize stimulated recalls due to the unavailability of our participants (especially mobility students) after the end of the academic year.

## Results

### Quantifying Uptake Success

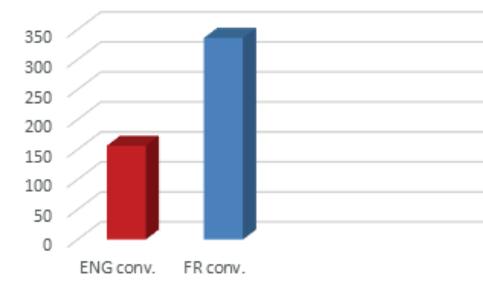
We identified 492 corrective feedback instances in the portion of the SITAF corpus under investigation, that is, in both recording sessions, in both communicative games, in both languages. However, there was a dramatic difference between the two language conditions: the English section<sup>7</sup> accounted for only 156 (31.7%), and the French one for the remaining 336 (68.3%), tokens. This sharp contrast, highly significant ( $p < .005$ ), is visually presented in Figure 3.

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<sup>7</sup>That is, the conversations held in English, where the NSs were the Anglophones, and the NNSs were the Francophones. Analogously, the French section refers to the French conversations, where the NS/NNS roles were reversed.

**Figure 3**

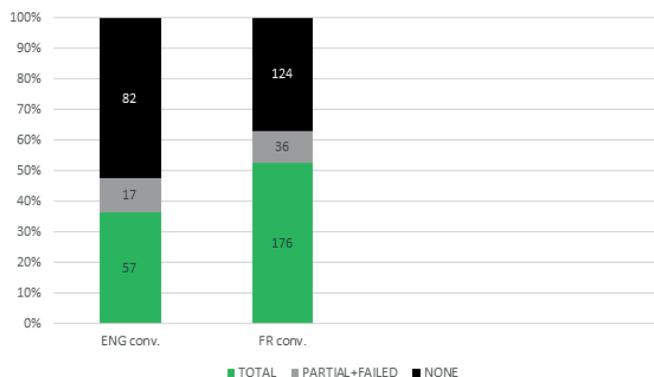
*Amount of CF in the English vs French Conversations*



The two language conditions also showed significant differences in terms of immediate uptake success. In both, the two intermediate categories presented in a previous section—*partial* and *failed* uptake—jointly accounted for just over 10% of all CF instances. The remaining 90% showed either *total* or *no* uptake: in other words, in the overwhelming majority of cases the NNS tandem partners either produced the (reasonably) correct L2 form, or did not detectably react to the CF at all. These two extremities of the spectrum, however, were distributed very differently in the English as opposed to the French conversations. While 52.6% of the corrective feedback found during the English conversations met with no uptake on the part of the French participants (NNSs) at all, total uptake occurred in just 36.5% of instances. In the French tasks the figures were almost identical, except in reverse order: it is total uptake that accompanied the NS’s corrective endeavors in 52.4% of cases, with 36.9% of CF tokens going unnoticed or—not necessarily deliberately—ignored (no uptake on the part of the NNSs, i.e., native English speakers). These divergent patterns are illustrated in Figure 4.

**Figure 4**

*Relative Share of Total vs. Partial + Failed vs. No Uptake in the Two Language Conditions (English Conversations and French Conversations)*



Needless to say, the boundaries between the respective categories can be rather fluid. Since our use of the term *uptake* relates to any observable attempt by the NNS at modifying their original utterance in reaction to CF, the most salient line of demarcation on the uptake continuum is that between *no uptake* and the remaining three types. If viewed in this way and considered jointly for both language conditions, the results can be interpreted optimistically: uptake of some sort occurred in the case of as many as 58.1% of corrective instances, that is, more often than it did not. It has to be borne in mind, however, that the respective figures were of a significantly different order for the English and the French conversations.

### Success and Failure through Participants' Tales: Questionnaire Answers

As previously mentioned, the tandem participants' answers to three questionnaire items will be considered, in a bid to provide another measure of their perceived L2 learning success.

#### *Question 15 in the general questionnaire*

*Working in tandem with your partner allowed you to improve your knowledge and skills in which of the following domains?* The perceived improvement was shown on a 0–5 scale, separately for each of the following five domains: culture, pronunciation, grammar, vocabulary, general ease of expression. The results (group averages) are given in Table 1.

**Table 1**

*Perceived (Self-declared) Improvement Following the Tandem Program*

	English NSs	French NSs
(a) Culture	3.62	3.29
(b) Pronunciation	3.36	3.05
(c) Grammar	2.90	2.57
(d) Vocabulary	3.95	3.67
(e) Ease of expression	4.24	3.95

Once again, the data obtained from the Anglophone and the Francophone participants show both striking similarities and noteworthy differences. The hierarchy formed by the five dimensions is identical for the two groups: (e) > (d) > (a) > (b) > (c). That means that both cohorts noted, on average, the biggest improvement in the area of ease of expression and the smallest in that

of grammar. Out of the three specific language domains targeted by this question—pronunciation, grammar and vocabulary—it is vocabulary that emerged victorious. Interestingly, it was also by far the most frequently targeted area during the corrective episodes discussed earlier in the paper, accounting for 52.5% of all CF tokens in the English, and 49% in the French, part of the corpus (Scheuer & Horgues, 2020). However, there is a dissimilarity between the two language groups when it comes to the *extent* of their perceived improvement. On all five dimensions, the native English speakers tended to feel they had made better progress than their French counterparts, although the differences fail to reach the threshold of significance.

### ***Question 16 in the General Questionnaire***

*Evaluate your confidence in speaking [L2] before beginning your tandem meetings and after, on a 0–10 scale, separately for each point in time.* There was a very highly significant perceived improvement in the case of both language groups: on average, by 2.9 points for the Anglophones and by 2.24 points for the Francophones. Yet again, it is the former cohort that reported a greater benefit, even though the difference is, again, non-significant ( $p < .057$ ).

### ***Question 19 in the Pronunciation Questionnaire***

*Speaking with your partner and receiving advice from them have helped you to improve your pronunciation.* Out of the 5 options to be picked from, the moderately optimistic one—*some aspects of my pronunciation*—was the overall winner. It garnered 12 hits from the French NSs and 8 from the native English speakers. The latter score (8) was matched by that obtained by the most enthusiastic option (*yes, most aspects of my pronunciation*), which was chosen 5 times by the native French participants. Reassuringly, in neither language group was the answer *definitely not* circled at all.

## **Discussion**

Two possible measures of success in tandem L2 learning are proposed in this paper: (1) the amount of learner uptake immediately following corrective feedback offered by the NS tandem partner, and (2) participants' self-reports of success or failure, in the form of their answers to the questionnaires administered at the end of the tandem program. Both sets of analyses have yielded results which point to the prevalence of success over failure, even though these conclusions need to be qualified in various ways.

The typology and definition we adopted for uptake—*total*, *partial*, *failed* or *no uptake*—shows a graduated success-failure continuum. Uptake of some degree accompanied a total of 58.1% of all CF tokens. However, there was a sharp difference between the relative uptake success shown by the L2 French and the L2 English learners: while 63.1% of CF met with some observable reaction on the part of the learner<sup>8</sup> during the French conversations, this figure drops to 47.4% during the English exchanges (Figure 4). This tendency for the native English speakers to attain greater uptake-related success in L2 than their French counterparts was matched by their more optimistic assessment of learning progress made during the program, as per the post-recording questionnaires. While both language-culture groups reported improvement in all the areas under investigation (vocabulary, grammar, etc.), this impression was stronger in the case of the Anglophones. It is not difficult to trace a connection between the two measures, which may explain why it was the English NSs who seemed to enjoy an advantage on both counts. They received significantly more corrective feedback than their French partners, which must have promoted the feeling that they actually learned something. If CF is frequent, its saliency may be enhanced and it is also probably easier to develop the habit of reacting to it. If, on the other hand, it occurs only rarely, its recipients may be more prone to miss its corrective function since they are not primed for it. This abundance of feedback in the French conversations did not, however, undermine the Anglophones' self-assessed confidence in speaking their L2. A substantial enhancement of that confidence was reported by both language groups, although—yet again—the French NSs tended to be somewhat less enthusiastic, with the difference between the two cohorts almost reaching a statistically significant level. Interestingly, the confidence boost was not universal, since one of the native English participants actually reported regression in that domain, by 2 points on a 0–10 scale. It has to be borne in mind, however, that questionnaires of this type only tend to convey the participants' subjective impressions and representations, which may not be reliable reflections on the actual learning progress and should therefore be treated with caution, especially if comparisons are made between groups characterized by divergent cultural and scholarly traditions.

While the first of the proposed measures of success—uptake amount—may be considered less subjective of the two, it is naturally not without its problems, either. One issue, already discussed in the section *Assessing Success in L2 Learning through CF-Uptake Sequences*, concerns the very validity of treating uptake as indicative of progress in the language acquisition process. Just because the learner correctly repeats the model form provided by the NS

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<sup>8</sup> It was the native *English* participants that were the learners (and therefore, the CF receivers) during the French conversations, and vice versa.

does not automatically mean that the form has been, or will be, internalized, since “we cannot ignore the possibility that they parroted the recasts with no true understanding” (Egi, 2010, p. 16). Conversely, lack of any verbal reaction to the CF does not necessarily equal lack of noticing: the feedback may have a delayed effect on the shape of the learner’s interlanguage. To quote Egi (2010, p. 16) again, “[g]iven that responses to recasts are not discursively required, learners may not always choose to respond to the recasts or may respond only subvocally.” Not being able to tap into the learners’ awareness and intentions through stimulated recalls is a methodological limitation of our study. This technique would have given us some supplementary introspective data about the participants’ post-recording interpretations of the functions of certain speech moves observed in the corpus. Also, the link between CF/uptake sequences and L2 development may be language area sensitive. While total immediate uptake of a syntactic or lexical structure may not deserve to be hailed as actual progress, we think that the situation is rather different for pronunciation. Even “simple” parroting of the NS-generated form testifies to the NNS’s ability to mobilize the corresponding articulatory gestures, giving them the motor practice facilitating further L2 learning. As noted by Saito (2021, p. 422), the benefits of pronunciation recasts can be further enhanced in a learning context involving “communicatively important and salient features,” which is largely the case with the SITAF conversation tasks.

The other—related—issue regards uptake permanency. Even if uptake goes beyond the plain on-the-spot parroting (i.e., the learner repeats the model form meaningfully), its long-term effect cannot be taken for granted. It would be highly enlightening to be able to systematically verify how the learners reproduced the previously “uptaken” forms later in the recording cycle. However, the fact that Games 1 and 2 featured semi-spontaneous speech—the participants were given specific conversation topics but those topics were different in the two recording sessions—makes such systematic comparisons impossible. Partial insight into this matter, meanwhile, can be gleaned from the reading task, where the same text was used in Sessions 1 and 2 (see section Sessions and tasks). Our analysis of the pronunciation uptake in the English task (Horgues & Scheuer, 2014) suggested, rather predictably, a quantitative deterioration over time. Calculated in relation to the CF provided during the first (monitored) reading, the combined amount of total and partial uptake dropped between Session 1 and 2. This decrease, however, was not statistically significant, and it still left the overall figure at 73.3%. In other words, nearly  $\frac{3}{4}$  of the pronunciation errors corrected by the NS during the first reading were eliminated—partially or totally—by the NNS learner during the final reading, three months later. From the point of view of L2 learning success, this is a fairly encouraging result.

## Conclusion

The tales told both by the SITAF uptake results and by the participants themselves are certainly tales of success rather than failure, even if this success is naturally relative, subjective and far from universal. The two measures of success that we explored in this paper both interact with and complement one another: more corrective feedback tends to lead to—proportionally—more uptake, which tends to enhance self-confidence and a sense of achievement experienced by the learner. A boost in confidence in speaking L2 is a success in itself, even in the absence of immediately available tangible evidence of improved accuracy of L2 structures under scrutiny. Among other things, it is bound to lead to a reduction of foreign language anxiety, which in turn is beneficial for successful communication on many different levels.

The analysis of our CF-uptake data could undoubtedly be refined in the future, for example by exploring possible interactions between various variables, such as CF type and uptake type, task type and uptake type, or effects of partner-generated repair vs. learner-generated repair (not discussed here) on the permanency of uptake. Another future perspective may concern a refinement of the description of the quality of uptake, through drawing a distinction between simple repetitions and incorporation repetitions of the model form. Contrary to what Lyster and Ranta (1997) seem to imply by conflating the two, we think that the latter type—where the learner incorporates the form into their own personal phrasing—is a more reliable sign of the L2 development progressing. Last but not least, we would like to investigate cases of *no opportunity for uptake*, where “the NS immediately continued on with the ongoing or another conversational topic without giving the learner a chance to respond to the recast” (Egi, 2010, p. 8). Following Egi, such episodes could be coded accordingly and therefore be removed from the *no uptake* category, thus providing a more accurate reflection on the learners’ reactions to corrective feedback.

Language learning in tandem with a native partner is an excellent way of progressing in one’s L2 in a friendly, collaborative environment. In such a setting, focus-on-form episodes occur incidentally during communicative, focus-on-meaning activities. The SITAF tandem program bore fruit, both in terms of learner uptake success and—potentially even more importantly—self-reported progress and overall satisfaction. The latter was self-estimated to be at the level of 9.2/10 by the native English and the native French participants alike (Question 17 in the general questionnaire). It was therefore a highly positive experience, despite the fact that, rather unsurprisingly, at the end of the three-month program some difficulties still remained, and Anglophones still sounded like Anglophones.<sup>9</sup>

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<sup>9</sup>This statement draws on the answer given by an English NS to the last question in the *Tandem and Pronunciation Questionnaire*.

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**„Nach drei Monaten klinge ich immer noch wie ein Anglophoner“:  
Erfolgs- und Misserfolgsgeschichten von englisch- und französischsprachigen  
Teilnehmern an einem Tandemprogramm**

Zusammenfassung

Im vorliegenden Artikel werden zwei Möglichkeiten beschrieben, wie Erfolg oder Misserfolg in einem nicht-institutionellen Fremdsprachenlernkontext, und zwar in einem Sprachtandem, operationalisiert und quantifiziert werden kann. Dabei wird auf die SITAF-Datenbank gestützt, wo 25 Stunden Videoaufnahmen mit Gesprächen von 21 Paaren („Tandems“), jeweils bestehend aus einem englischen und einem französischen Muttersprachler, gespeichert wurden. Die Teilnehmer wurden bei Gesprächen in beiden Sprachen aufgenommen, so dass jeder von ihnen die Möglichkeit hatte, sowohl als „Experte“ als auch als „Anfänger“ (Lernender) zu agieren. Die Tandempartner trafen sich regelmäßig und autonom auch außerhalb der Aufnahmesitzungen miteinander und eines ihrer erklärten Ziele war es, Fremdsprachenkenntnisse zu erweitern. Zwei mögliche Maßstäbe für die Erreichung dieses Ziels waren: (1) Der Grad der Absorption (*uptake*) des korrigierenden Feedbacks (*corrective feedback*) vom Expertenpartner. In dieser Hinsicht wurden signifikante Unterschiede zwischen den beiden Sprachgruppen festgestellt: während 52% des von französischen Muttersprachlern

gegebenen Feedbacks von ihren englischsprachigen Partnern vollständig absorbiert wurden, blieben mehr als 52% des in Englisch gegebenen Feedbacks bei ihren französischsprachigen Partnern wirkungslos. (2) Die Selbstberichte der Teilnehmer über die erzielten Fortschritte, sowohl aus der Sicht von Experten als auch von Anfängern. Die Berichte wurden durch Fragebögen erhoben, welche die Partner nach dem dreimonatigen Tandem-Lernprogramm ausfüllten. Die Analyse der Antworten auf die gestellten Fragen zeigt ein hohes Maß an Zufriedenheit unter den Teilnehmern, sowohl in Bezug auf die Fortschritte in bestimmten Domänen der Fremdsprache (Wortschatz, Aussprache usw.) als auch auf die allgemeine Sprachfertigkeit. Dabei war der angegebene Zufriedenheitsgrad bei den englischsprachigen Teilnehmern etwas höher als bei den französischsprachigen Teilnehmern.

*Schlüsselwörter:* korrigierendes Feedbacks, Fremdsprachenlernen im Tandem, Absorption (*uptake*)

Appendix

## General Tandem Questionnaire (English-speaking participants)<sup>10</sup>

University year:

Concentration/Major:

1. Number of tandem meetings with your partner since the January 31, 2013, meeting: .....

Did you find the number of meetings to be (circle your answer)...: *insufficient / sufficient / too frequent?*

2. How often did you meet your tandem partner? (circle your answer):  
*twice per week / once per week / once every other week / once every 20 days/ once per month*

Did you find the frequency of meetings to be (circle your response)...:  
*insufficient / sufficient / too frequent?*

3. On average, how long did your tandem meetings last? *30 mins / 1hour / 1h30 / 2 hours / more than 2 hours*

4. What percentage of time was spent speaking French in your tandem conversations?

*[ 0 / 10 / 20 / 30 / 40 / 50 / 60 / 70 / 80 / 90 / 100 ] % of the time*

5. What percentage of time was spent speaking English in your tandem conversations?

*[ 0 / 10 / 20 / 30 / 40 / 50 / 60 / 70 / 80 / 90 / 100 ] % of the time*

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<sup>10</sup> The French participants received equivalent versions in French.

6. Over the semester, have you had the opportunity to converse with other French speakers:

*daily / several times a week / once a week / a few times over the semester / no*

Explain:

7. During your tandem conversations:

	always	almost always	often	sometimes	almost never	never
You begin the meeting in the same language (which language: .....)						
You start speaking in one language at the beginning of the conversation and then switched to the other language						
You speak in one of the two languages most of the time						
You speak one language at one meeting and the other language at the next meeting						
You switch from one language to the other throughout the conversation (for example when there was a comprehension problem)						
You don't mix languages, except to ask specific vocabulary or grammar questions Other (explain):						

8. During a conversation in a foreign language, if you have doubts about how to express something or if you have problems expressing yourself (grammar, vocabulary, pronunciation):

	always	almost always	often	sometimes	almost never	never
You stop and explain your problem in the foreign language						
You stop and explain your problem in your native language						
You continue to speak and wait for your partner to react						

9. When you make a mistake in French:

	always	almost always	often	some- times	almost never	never
Your tandem partner corrects you						
Your tandem partner corrects your vocabulary						
Your tandem partner corrects your grammar						
Your tandem partner corrects your pronunciation						

10. When your tandem partner makes a mistake in English:

	always	almost always	often	sometimes	almost never	never
You correct them						
You correct their vocabulary						
You correct their grammar						
You correct their pronunciation						

11. When your partner tells you something in English:

	always	almost always	often	some- times	almost never	never
You listen and try not to interrupt						
You listen and ask questions so as to help the conversation going on						
You interrupt your partner when you cannot understand what is said						
You interrupt your partner when they makes a mistake						

12. Did you notice any differences in your partner’s conversational habits that would be linked to their culture? YES/NO If yes, explain:

13. Have ever helped your partner in their academic work? YES/NO

14. Has your partner ever helped you in your academic work? YES/NO

15. Working in tandem with your partner allowed you to improve your knowledge and skills in which of the following domains? (Circle your answer)

0 = no improvement

5 = much improvement

– culture	0	1	2	3	4	5
– phonetics/pronunciation	0	1	2	3	4	5
– grammar	0	1	2	3	4	5
– vocabulary	0	1	2	3	4	5
– general ease of expression	0	1	2	3	4	5

16. Evaluate your confidence in speaking French before beginning your tandem meetings and after:

0 = less confident

10 = more confident

before:	0	1	2	3	4	5	6	7	8	9	10
after:	0	1	2	3	4	5	6	7	8	9	10

17. On a scale of 0 to 10, how was your experience with working in tandem with your partner? (Circle your answer)

0 = the most negative

10 = the most positive

0 1 2 3 4 5 6 7 8 9 10

18. What is your overall impression of your tandem conversations? (obstacles encountered, benefits gained)

## **Tandem and Pronunciation Questionnaire (English-speaking participants)**

### **When speaking with your tandem partner in English:**

1. Do you adapt the way you speak to them? YES / NO. If so, what changes do you make?

	YES	NO
I speak more slowly		
I articulate more clearly		
I speak louder		
My intonation is clearer		
My vocabulary is more simple		
I use more straightforward sentence structure		
I use shorter sentences		

2. Now choose one of the terms below to describe your tandem partner’s accent [in English]:

*very strong / quite strong / moderate / quite slight / slight / very slight / no accent at all*

3. What do you think about the French accent in English as a rule:

4. I correct my partner’s pronunciation (circle one of the following):

*systematically, whenever I hear a mistake / almost always / often / sometimes / only when they ask me to / only when they ask me a specific question about a particular word / hardly ever / never*

5. I prefer to correct my partner’s pronunciation (circle one of the following):

*on the spur of the moment / at the end of their sentence / when they’ve finished saying what they have to say / at the end of our tandem session*

6. What exactly do you correct when it comes to your partner’s pronunciation?

	YES	NO	Please give examples:
Their intonation			
The rhythm of their English			
Their word stress			
The speed at which they speak			
Their consonants			

---

 Their vowels
 

---

 Their general fluency
 

---

Other:

 7. When you **don't** correct your partner's pronunciation, it's because:

	YES	NO
Their mistakes are too small		
It would be impossible to correct all their mistakes		
You don't want to make your partner feel uncomfortable		
You don't want to interrupt the flow of their ideas		
You don't think it's polite to correct or to interrupt your partner		
You don't like it when other people correct your mistakes when you're speaking		
You don't think correcting them would be helpful		
You can understand them despite their mistakes		
Your partner doesn't take your corrections on board		
You can't hear their mistakes		

8. Your partner's pronunciation in English prevents you from understanding them in English .....% of the time:

0 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Please provide specific examples from your tandem experience:

9. The advice you have given your partner has helped them to improve their pronunciation (circle):

*I haven't noticed any changes / yes, most of aspects of their pronunciation / some aspects of their pronunciation / no, not really / no, definitely not*

Say what has improved:

List any remaining difficulties:

10. Which pronunciation problems annoy you the most [in English by French speakers] even if they don't hinder actual comprehension?

**When you're speaking with your partner [in French]:**

 11. Would you say that your accent is:

*very strong / quite strong / moderate / quite slight / slight / very slight / no accent at all*

12. What do you think about the English accent in French in general?

13. What aspects of French pronunciation do you think you still need to improve?

14. Your partner corrects your pronunciation (circle one of the following):

*systematically when they hear a mistake / almost always / often / sometimes / only when I ask them to / only when I ask them a specific question about a word / hardly ever / never*

15. Your partner prefers to correct your pronunciation (circle one of the following):

*on the spur of the moment / at the end of my sentence / when I've finished saying what I have to say / during the tandem assessment session*

16. What does your partner correct about your [French] pronunciation?

	YES	NO	Please give examples
Your intonation			
The rhythm of your French			
Your word stress			
The speed at which you speak			
Your consonants			
Your vowels			
Your general fluency			

Other:

17. How often does your partner correct your pronunciation?

	YES	NO
Too often because it interrupts the flow of conversation		
Too often because it makes you feel uncomfortable		
Very often but you find it helpful		
From time to time and you're okay with that		

---

Rarely and you think it's a shame

---

Hardly ever, which is fine because you don't like being interrupted  
when you're speaking

---

18. Your pronunciation [in French] prevents you from making yourself understood by your partner .....% of the time

0 1 2 3 4 5 6 7 8 9 10

Please provide specific examples:

19. Speaking with your partner and receiving advice from them have helped you to improve your pronunciation (circle):

*I haven't noticed any changes / yes, most aspects of my pronunciation / some aspects of my pronunciation / no, not really / no, definitely not*

Say what has improved:

List any remaining difficulties:



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## Hopeless Cases or Just Hard Nuts to Crack? Stories of “Difficult” Foreign Language Learners

### Abstract

In accordance with the assumptions of the sociologically grounded labelling theory, an individual's self-perception and, consequently, their actions, might be influenced by words used to describe them. Also, in the context of education, including the field of foreign language learning, such a process of defining learners in a simplified way, has been proven to have profound consequences of psychological nature. The main purpose of the article is to outline the results of a study in which 37 teachers of English shared the stories of their most “difficult” students. The qualitative analysis of the gathered descriptions allowed the identification of some common features characteristic of, so-called, hopeless cases, among which motivation-related problems are the most often enumerated ones. Additionally, many teachers wrote about their struggles while teaching students with special educational needs. The views expressed by the participants of the study might help understand the way in which opinions about students are formulated as well as point to the need for significant changes to be made in the area of foreign language teacher education and training.

*Keywords:* difficult/problematic student, foreign language learner, formal labelling, informal labelling, labelling theory, teacher training

While reading posts published on different forums and online groups for foreign language teachers, on numerous occasions one might notice hashtags labelling students in a negative way. For example, the tags “problematic student,” “difficult student,” and “hopeless case” have occurred in 53 posts written since 2014 on one of the biggest groups for Polish teachers of English. Such hashtags are usually accompanied by more or less detailed descriptions of specific students who constitute some kind of a pedagogical challenge for their teachers. The teachers finish their posts with requests for help and advice. It is important to note here that such groups can be easily accessed by students and their parents and, what is more, the teachers publish these posts under their own names,

and they provide a lot of details about a particular case, so a given individual can easily identify himself or herself. This may be potentially problematic for those students.

Psychologists underline the importance of messages we receive about ourselves from people around us and point to their crucial role in the process of self-construction. The aim of this paper is exploring the reasons behind such choices of words to describe students. To do that, the paper outlines the results of a study in which 37 teachers of English decided to share the stories of their most “difficult” students.

In terms of structure, in the first section of this paper, the notion of *a label* is defined and the main assumption of the labelling theory in relation to the educational context are presented. Then, the study design and its methodology are described, followed by a section discussing the obtained results and suggesting further directions of research on the topic of labelling in the field of foreign language education. The paper closes with an appendix containing the translated version of a questionnaire for Polish teachers of English used in the presented study.

## Labelling in Education

The belief that our self-concept is created in the process of recognising how other people perceive us has been reflected in the sociologically-grounded labelling theory, developed and popularised in the 1960s and 1970s. As pointed out by Matsueda (2014), the initial statements reflected in this theory include the ideas of George Herbert Mead, Frank Tannenbaum, Edwin Lemert, Émile Durkheim, Kai Erikson, and Howard Becker, who is recognised as the main creator of the labelling theory.

From the sociological point of view, *a label* might be defined as a particular word choice used to describe, or define, a given person. A label is not neutral, as it “contains an evaluation of the person to whom it is applied,” as pointed out by Haralambos and Heald (1985, p. 430). Thompson (2017) underlines that in the process of labelling, a given person or a group is defined in a simplified way. Through such categorisation, often based on first impressions, the complexity of the whole person is ignored, and individuals are simply assigned into broad categories. In education, the labelling theory may be applied to situations when teachers choose to (or are obliged to) use particular labels for their students in relation to their behaviour, ability and intellectual potential. The application of labels might lead to the occurrence of new problems that result from the reactions of others and the individual themselves to negative

stereotypes (stigma) attached to a given negative label (Becker, 1963; Lemert, 1967; Bernburg 2009).

Although in his paper, Bernburg (2009) focuses on the issue of labelling in the context of criminal behaviours, he underlines the importance of the distinction between “formal” and “informal” labelling, significant also from the educational perspective. As the name suggests, formal labels come from various officially regulated institutions, such as courts, police, corrections, etc., and usually involve some kind of legal consequences imposed on an individual and/or their surroundings. In turn, informally assigned labels are attached to a given person in an unofficial way, usually by parents, peers, educators, etc. In education, formal labelling would mostly involve the application of different medical/diagnostic labels (“dyslexic,” “hyperactive,” etc.), whereas informal one might actually come from very different sources, including one’s teachers, classmates or parents, commenting, for example, on the intellectual abilities of a given student (cf. Boyle, 2020).

Both risks and values of diagnostic labelling in education are extensively discussed by Lauchlan and Boyle (2020). They underline that the educational system makes it necessary to diagnose students and, consequently, attach some formal labels to them, in order to get official support for the learner (for example, the help of a teacher assistant or additional hours of classes). Moreover, for some students, teachers, and parents, identification of a problem in the form of a medical label might come as a relief—from now on they know what to do and where to look for help. Still, diagnostic labels might also bring a number of negative consequences, including: (1) the risk of misdiagnosis or incorrect, subjective interpretation of a label; (2) inability to recognise variability within individuals sharing the same label; (3) inadequate lowering of the expectations by educators, sometimes in the areas not requiring special treatment; (4) influencing teachers’ sense of competence concerning their perceived lack of (sufficient) qualifications to teach a diagnosed child; (5) attachment of a life-long label, in some cases, incorrect one (cf. Lauchlan & Boyle, 2020).

As already hinted, the concept of informal labelling may be applied to situations when teachers choose to use particular labels for their students in relation to their behaviour, ability, and intellectual potential. Teachers tend to make judgements about their students over a period of time, and, as pointed out by Thomson (2017), they base their opinions on students’ behaviour in class, their attitudes to learning, previous school reports, interactions with them, and even encounters with their parents. Unfortunately, the labels given to students in the educational context are sometimes grounded in stereotypes, as some educators base their opinions not on students’ behaviour and performance but on a number of preconceived ideas developed on an individual’s ethnicity, gender or social class background. Browne (2005) states that even children’s way of dressing or speaking might be taken into account in this process. As a result

of these more or less correct observations, students are eventually classified as high or low ability, hard working or lazy, naughty or well-behaved, bright or slow, promising or hopeless, etc. Still, as underlined by Thompson (2017), it is debatable whether contemporary, highly trained and competent teachers still label students along the same criteria—for example, whether they assume the existence of the correlation between students' social backgrounds and their intelligence.

Both Browne (2005) and Thompson (2017) highlight that the labelling procedure might exert adverse effects of psychological nature because, as several studies show (cf. Rosenthal & Jacobson, 1968; Rist, 1970; Hargreaves et al., 1975), if a teacher labels a student a certain way, there are chances that they will accept this label as true and will act in accordance with the prediction. The labels, which might be treated by students as sources of valid self-knowledge, can influence the construction and development of their identities by shaping their self-concepts. Informal labels attached by teachers may influence not only the way how students see and define themselves but also the dynamics and nature of interactions with others (cf. Triplett & Jarjoura, 1994; Sampson & Laub, 1997). This, in turn, can affect their attitudes towards school, their in-class behaviour, and eventually might be reflected in their general level of educational achievement (cf. Thompson, 2017). Interestingly enough, as suggested by Baudson and Preckel (2016), also the positive label of *giftedness* might prove harmful, as it puts students under excessive pressure.

The process of labelling resulting in a situation when a given student behaves and performs in the particular way that was predicted by the teacher constitutes an example of the self-fulfilling prophecy. As defined by Nomi and Pong (2010, p. 531), “the self-fulfilling prophecy is the process by which one’s expectations of other people lead those people to behave in ways that confirm those expectations.” This phenomenon is also known as *the Pygmalion effect* after the title of the publication by Rosenthal and Jacobson (1968). The mechanisms behind the self-fulfilling prophecy are outlined by Thompson (2017), who explains that teachers tend to expect more from students they think are more intelligent, and do not expect as much from the ones seen as less gifted. Consequently, a student with a positive label is more likely to be placed in a higher band, and the opposite is true for a student pre-judged to be less able. Thus, it should not be surprising that students labelled in a positive way are more likely to adopt a favourable vision of studying, whereas their negatively labelled peers might even develop an anti-school attitude. On top of that, these mechanisms can be further reinforced by peer-group identification. Therefore, accepting the assumptions proposed in the labelling theory, it might be stated after Thompson (2017) that “the students attainment level is, at least to some degree, a result of the interaction between the teacher and the student, rather than just being about their ability.”

Interestingly, negative labelling can sometimes have the opposite effect, which was proven, for example, in Fuller's (1984) research conducted in a London comprehensive school on black girls labelled as low-achievers. Fuller (1984) found out that, although the girls were labelled as less gifted, their response to this negative label was to work diligently on their educational success to prove their teachers and the school wrong (cf. Thompson, 2017). Therefore, it may be hypothesised that the nature of the influence of a particular label on an individual or group will depend on a number of different factors, including, for example, teaching contexts, group dynamics, and students' personalities.

As any other theory, also the labelling theory has been questioned and criticised. For example, as stated by Thompson (2017), it has been suggested that it attributes too much importance to teacher agency, defined by Biesta et al. (2015) as active contribution of teachers to shape their work and its conditions. What is more, as pointed out by Thompson (2017), structural sociologists emphasise that schools themselves make teachers label students—in many cases students are obliged to write entry tests, over which teachers have no control. The results of such tests influence grouping of students and assigning them into ability groups. Additionally, acting in good faith and striving to assist students in need, the school requires teachers to provide some extra support for those labelled as “low ability,” even before such a need occurs.

The school system of separating students into groups in accordance with their previous attainment or predicted ability is referred to as *binding* or *streaming* and, as underlined by Browne (2005, p. 292), it has been proven “to be unfair and harmful to the self-esteem and educational performance of bottom-stream pupils, as teachers expect less from children in lower streams and give them less encouragement than those in higher streams.”

Nowadays, the procedure of streaming seems to be especially common in the field of foreign language education, as big classes are often divided into smaller language groups. For example, in the Polish educational context, secondary school and university students are often grouped accordingly to their expected level. In some cases, placement tests are implemented for this particular purpose.

To sum up, despite the criticism, mechanisms similar to the ones described in the labelling theory have been identified by psychologists and sociologists. Related phenomena include, for example, the already described Pygmalion Effect or the Golem Effect, which refers to a situation in which low expectations placed upon an individual lead to their poor performance (cf. Rowe & O'Brien, 2002).

## Method

Recognising the potentially harmful effect negative labels might have on students, I decided to analyse the reasons behind the procedure of labelling in the context of foreign language teaching. Special emphasis has been placed on the hashtag “hopeless case,” as it indirectly suggests the existence of individuals incapable of acquiring a given foreign language and, consequently, seems to be especially stigmatising.

### Research Aim and Questions

Striving to explore the issue of negative labelling in the context of foreign language education, the following research questions have been posed:

1. Do foreign language teachers label their students as “hopeless cases”?
  - What is their perception of “a hopeless case”?
  - Are there any characteristics shared by the students described by them as “hopeless cases”?
2. What are the teachers’ recommendations for those working with such students?
3. What gaps in teachers’ knowledge and training might be indicated by the application of such a label in relation to their students?

### Research Tool, Data Collection, and Participants

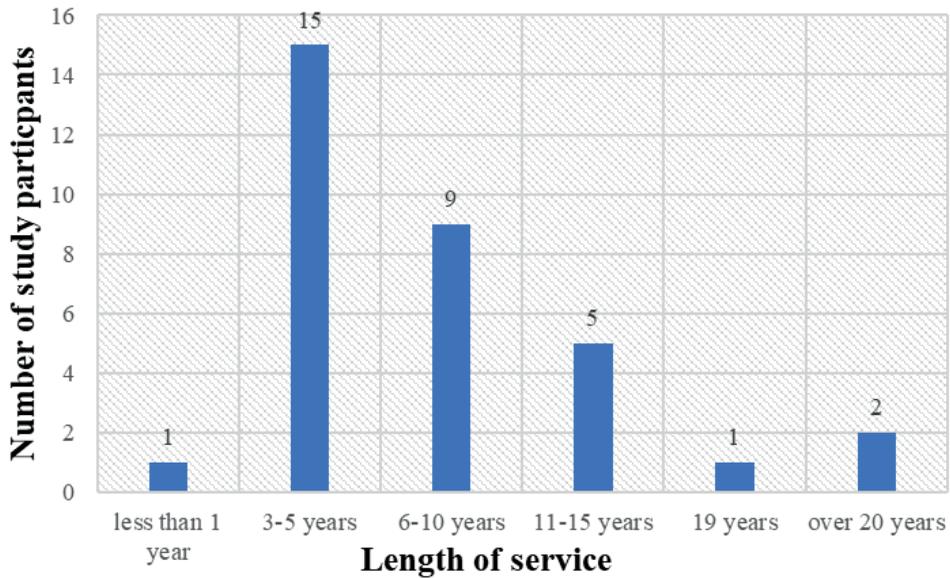
In order to answer the above questions, a link to a questionnaire (in Polish) was published on two Facebook groups for foreign language teachers (cf. Appendix). The questionnaire consisted of 11 questions. The first set concerned the issue of teachers’ background, then the teachers were inquired about their perception of the hopeless case, their experience when it comes to working with students described in this way and, finally, they were asked to describe one such case in more detail.

The data was collected at the turn of 2019 and 2020. Although I used voluntary sampling method, the teachers who participated in the study represented a variety of backgrounds and were characterised by different personal variables and professional experiences. In total, 37 answers were submitted—36 from female teachers and one from a male teacher. This unequal gender distribution seems to be the result of the dominance of female teachers in the Polish educational system. All study participants were teachers of English as a foreign language, but some also taught other languages, including German

(one person), Spanish (two people), and Italian (one person). As one can see in Figure 1, they constituted quite a diversified sample when it comes to their teaching experience. Their length of service ranged from less than a year to over 20 years in two cases.

**Figure 1**

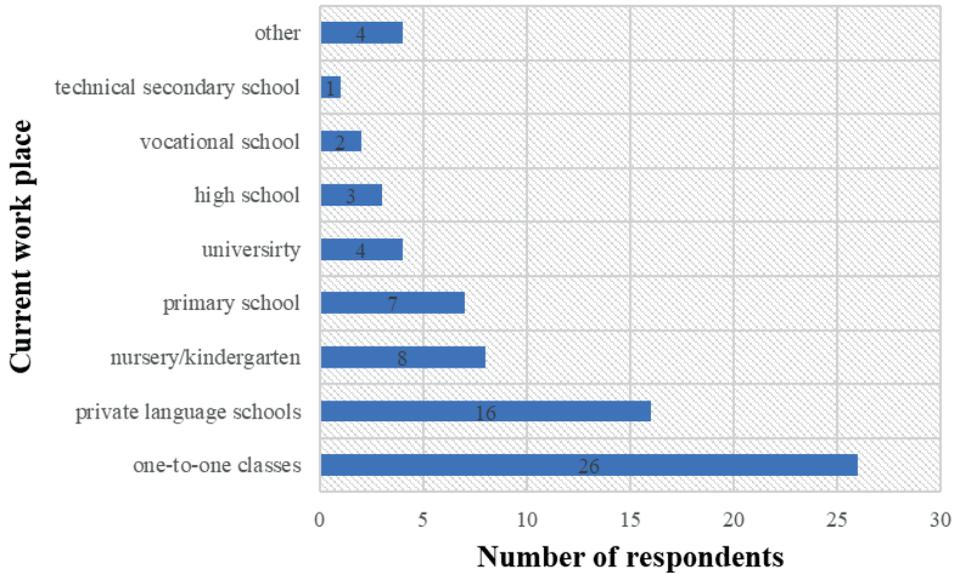
*The Length of Teaching Experience of the Study Participants*



The teachers conducted classes for students of different ages (from toddlers—seven people, to adults—12 respondents; with the biggest number of teachers (28) working with younger teenagers, that is, students aged from 11 to 15), worked in a variety of places and taught both larger groups and individuals. Most of them worked in the private sector, including 26 respondents tutoring individual students and 16 declaring experience of teaching in private schools. The details concerning the workplace of the study participants are presented in Figure 2.

**Figure 2**

*The Place of Work Declared by the Respondents (Multiple Answers Accepted)*



## Analysis

After collecting background information, the respondents were asked a number of open-ended questions related directly to the topic of the “hopeless cases” in the context of foreign language education (cf. Appendix). In order to specify the frequency of occurrence of such students, the participants were questioned about the precise number of the ones they could recall.

Then, to better understand the reasons for nicknaming a student as “hopeless,” I asked the respondents to write detailed descriptions of students with whom they had worked and who, in their opinion, constituted a perfect example of such a case. In other words, the purpose of the next query was to identify points of similarity between the labelled learners:

Imagine that you are writing an essay entitled “My #hopeless case.” Please describe the student whom you consider to be the best illustration for the hashtag “hopeless case” in the context of teaching/learning a foreign language (do not include personal details—still, you can use the first name, specify age/gender/language level and learning context). Why does this person deserve such a “tag”?

When interpreting the teachers' descriptions, content analysis was carried out, as it allows for the identification of prevailing themes in given qualitative data (cf. David & Sutton, 2004). The collected answers were analysed with the help of the NVivo software in order to identify some patterns or, in other words, some features shared by those described as "hopeless cases." The provided answers were carefully read in order to identify key codes, which corresponded to the main themes emerging from the students' descriptions. The coded fragments of answers (single words, phrases, or sentences) could be assigned to more than one theme. Coding consistency was ensured by the fact that the whole process was conducted by one person only (the author herself). In the process of data analysis, eight codes emerged. The codes corresponding to the main areas (or themes) in which problems of the described "hopeless" cases were reported include: (1) motivation-related problems, (2) special educational needs/mental disfunctions, (3) disruptive behaviours, (4) lack of cooperation with the teacher, (5) family/parent-related issues, (6) student's emotional issues, (7) problems with the choice/application of learning strategies, (8) negative attitude towards the subject/teacher.

Finally, the teachers were also asked about their ways of dealing with "hopeless cases" and were invited to share some practical tips for those who will face a similar didactic challenge in the future. The collected suggestions were analysed and grouped in accordance with their prevailing didactic overtones, leading to the identification of the following categories of hints: (1) general teaching methods and techniques, (2) general learning philosophy, (3) ways of approaching the individual student, (4) teacher training and wellbeing.

## Results

The purpose of the following section is to present the results of the conducted qualitative analysis, described in accordance with the defined codes corresponding to the problematic areas linked to the perception of "hopeless" students. Then, the study participants' recommendations stemming from their experience of working with problematic students will be outlined.

### Teachers' Perceptions of "Hopeless" Cases

As stated above, this subsection describes the identified categories of "hopeless" language learners. In order to better illustrate the identified issues,

some of the descriptions provided by the respondents and translated from Polish are also presented.

### ***Motivation-related Problems [13 References Described by Eight Teachers]***

The most often repeated characteristic was students' unwillingness to learn a given foreign language, mentioned 13 times by eight respondents. In this context, teachers talked about students being forced to study by their parents or educational system and about students who do not understand the importance of foreign language knowledge. The descriptions provided by the study participants and quoted below clearly illustrate the importance of one's motivation, especially the inner one:

Teacher 19: During each quiz or test, he marked his own paper as failed and gave back an empty page, as "English is of no use to him." Each attempt to motivate the student was unsuccessful.

Teacher 29: The boy has no interest in learning English, because, as he says, he will never go abroad.

Then, the case described by Teacher 14 further illustrates the importance of attitude and motivation. There is also a visible clash in the perception of this boy—his mother considers him to be especially gifted, whereas the teacher seems to have a different opinion:

Teacher 14: The student, described by his mum as a "genius reading books till 4 am," demonstrates a totally disrespectful approach to the process of English learning and the teacher. His average grade in English doesn't exceed 2.5... Still, when asked why hasn't even had a glance at the material from previous classes [...], he responds that it is of no use to him.

### ***Special Educational Needs or Presumed Mental Disfunctions [11 References Provided by 11 Teachers]***

The second most often reported source of teachers' problems (11 references by 11 participants) is the need to work with students with special educational needs (SENs) of various natures. In this context, the respondents mentioned both diagnosed and presumed disfunctions, for example, dyslexia, aphasia, Asperger's syndrome, or concentration problems. Here are some quotes illustrating the broad range of issues in this area:

Teacher 2: I'll describe an 8th grade student with "opinion" and learning difficulties in each and every subject...

Teacher 4: I have a student who can't concentrate on the lesson, she prefers drawing instead [...]. Even her parents can't help her focus.

Teacher 7: He has tremendous problems with concentration.

Teacher 9: Currently, I'm teaching a boy who is dyslexic and who believes he can make mistakes freely—his mum states that teachers have no right to evaluate him negatively, as they are obliged to follow the recommendations [of the psychological-pedagogic clinic]. So, he has adopted the attitude of his mother... He is so unambitious and insecure that he does nothing to get better results. [...] Unfortunately, he constitutes another example of a student who does not study, does not revise at home and, at the same time, does not have any support from parents, who can't help and boost his self-esteem.

Teacher 20: Julia suffers from aphasia; she has huge problems with language learning—even with tasks requiring matching a picture with a description.

Teacher 32: He was a high-school student with dyslexia, dysgraphia, and dysorthographia.

Teacher 33: The boy, fourth grade, primary school, dyslexic. My work, additional materials, strategy training—all these didn't influence his language level. He was really motivated and hard-working, but he had "a tag" attached—"I'm dyslexic, I can't learn new words."

An especially complex case was described by Teacher 9. As can be concluded from her description, there is a clash in the perception of dyslexia by the teacher herself and by the student's parents. She suggests that the problem may be tracked down to the parents' understanding of this learning difficulty, and, at the same time, their lack of support. The student is categorised as unambitious, insecure, and not doing anything. While reading this description, one might be a bit confused about the excerpt concerning the recommendations of the psychological-pedagogical clinic—the criticising tone (of the phrase "as they are obliged to follow the recommendations") can be interpreted as a suggestion that these recommendations should not be followed, and/or that they are excessive. Currently, a lot of people, including even teachers and specialists,

talk about different learning difficulties as a way of avoiding effort by lazy students (cf. Suhecka, 2013).

Out of the descriptions provided above, the one presented by Teacher 33 seems to fully illustrate potentially harmful influence of labels used to describe students. In this case the label, which is in fact a medical diagnosis, paired with the lack of knowledge concerning this learning difficulty, clipped the student's wings, and/or gave him an excuse not to make an effort.

### ***Disruptive Behaviours of Students [Nine References by Eight Teachers]***

Another didactic challenge which prompted teachers to apply the “hopeless” label was related to cases of students manifesting disruptive behaviours during classes:

Teacher 8: The student sits during the classes doing nothing and disturbing everyone else for 45 minutes.

Teacher 16: Out of 60-minute lesson, 45 minutes is wasted on pointless discussions, reprimanding, and looking for xerox copies or books.

Teacher 17: The student does everything, except for studying.

Teacher 37: S., 23 years old (he hadn't been promoted a few times), 4th grade of technical secondary school. During our first lesson, after my short introduction in English, he said [in Polish]: “Common, Ania, cut the crap!”—and it was of course a reason for joy for the rest of the group. At times when I wore a skirt to work, he used to throw a pen under my desk and used it as an excuse to go under it. He didn't participate even in a single lesson; he never did his homework... When he failed the semester, the headmaster came to me and said: “Just give him the lowest grade to pass and to get rid of him from the school. After all, he won't pass the Matura [high school] exam anyway.” I didn't teach him anything during the whole year.

As illustrated in the quotations provided by Teacher 8 and 37, such disruptive behaviours are especially problematic when happening in the context of group teaching, as in such cases misbehaving students ruin the learning opportunity not only for themselves, but also for their peers. Then, the description given by Teacher 37 is especially alarming as it illustrates two examples of pathology, that is, the behaviour of the student, which can be classified as verbal or even sexual harassment of the teacher, and the comment (or even order)

by the headmaster, which prompted the teacher to give the difficult student an inadequate grade, just to get rid of the problem.

***Unwillingness to Cooperate with the Teacher [Seven References by Seven Teachers]***

The next category of “hopeless” students encompasses individuals who are not willing to cooperate. In contrast to the misbehaving students described above, these individuals do not actively disturb the flow of the lesson for others. Instead, due to their inaction, they seem to waste their time and the time of their teachers trying to encourage such students to cooperate:

Teacher 5: I ask him to open his notebook, note things down, focus on the exercise in the book. Usually, he doesn't reply. He never has his homework.

Teacher 10: The student doesn't react in any way to my instructions, neither to gestures nor to verbal commands in a foreign language.

Teacher 15: The boy refuses to cooperate in any way.

***Family-/Parent-related Issues [Seven References by Four Teachers]***

This subgroup of problems involves, apart from teachers and students, the third party, that is, the family of a given learner. In some of the cases, the teacher is just aware of the difficult situation of a given learner (Teachers 7 and 8); in others, there are more open clashes between teachers and parents (Teacher 33).

Teacher 7: He has some emotional problems resulting from his personal situation [...] He seems to look for attention.

Teacher 8: In my opinion, this is one of the cases of individuals who don't revise, don't study at home, but also don't receive any support from parents who would be able to help and build a child's self-esteem.

Teacher 33: The father of the girl didn't allow her to attend additional classes, although he is aware of her dramatic situation.

The case mentioned by Teacher 33 illustrates the issue of the parents' lack of cooperation and his (probably unintentional) acting to the detriment of the child.

***Other Emotional Problems of the Student [Five References by Five Teachers]***

Another established code relates to students manifesting emotional problems of unidentified origin. Especially striking case was described by Teacher 3, who mentioned an adult language learner characterised, in the teacher's opinion, by a low self-esteem:

Teacher 3: Despite the fact of having a wide array of vocabulary and good comprehension skills, the lady was so stressed about speaking, resulting from a really low self-esteem that she resigned overnight.

In turn, Teacher 15 described a boy vividly enacting his emotions and negative attitude towards the learning situation:

Teacher 15: Sometimes when I ask him to do something, he reacts in an aggressive way, or he cries. It looks as if his parents forced him to enrol at our language school "as a punishment," despite his intense resentment.

***Problems with the Choice and/or Application of Learning Strategies [Five References by Five Teachers]***

The problem of inadequate (or even lack of) learning strategies, mentioned by five respondents, concerns different aspects of foreign language education. For example, Teacher 14 describes a simple case of an eight-year-old boy who regularly does not do his homework:

Teacher 14: He copies homework from his classmates—and even this, he does it only when he feels like doing it.

Still, the issue is usually more complex and related to other categories of identified problems. The eight-year-old described above is also an example of a student unwilling to cooperate, who "shows no initiative." In turn, Teacher 17 mentions another inactive learner, unwilling to apply any language learning strategies, even the high-technology-related ones:

Teacher 17: In his case, there is no progress, but it results from his lack of work on the development of skills, his lack of willingness to listen or read in a foreign language. He even doesn't want to use computer applications at home.

A completely different case of a “hopeless” student was provided by Teacher 24. Here, the girl seems to concentrate on less relevant aspects of the educational process, that is, colourful entries in her notebook, and tries to distract the teacher’s attention from her general lack of competence by her excessive focus on vocabulary acquisition:

Teacher 24: Her attention is brought to a beautiful notebook with topics underlined with a glitter pen and highlighted new vocabulary. Most often, however, it is surprising that the selection of these “new” words is, to put it mildly, random. Anyway, words are like a lifeline for her—after a few lessons on a given unit, she asks about a textbook glossary and wants to know when she’ll write the vocabulary quiz. There is nothing wrong with that, but... it soon turns out that with this student, learning vocabulary is not a medium for effective use of language, but an end in itself. The beginning and the end. A mask that is supposed to cover the lack of competence.

***Negative Attitude towards the Subject and/or the Teacher [Four References by Three Teachers]***

Finally, the last category of problems encompasses cases of students characterised by their negative attitude, either towards the teacher or the subject itself. The student described by Teacher 5 manifest his dissatisfaction in an open and emotional way:

Teacher 5: The moment he hears the word “English,” some kind of resistance appears, and he starts acting as he wants to escape. He cries when I sit down and try to study with him.

Then, Teacher 6 mentioned a case of an unmotivated boy for whom English classes are just a burden and painful obligation:

Teacher 6: English classes are a waste of time for him—he even perceives them as a punishment.

Finally, from the description provided by Teacher 10, it might be assumed that there was a teacher-student type of a problem, probably involving communication issues:

Teacher 10: He just doesn’t know what this “mean woman” wants from him.

### *A Mixture of Different Problems*

As can be concluded from the above quotes, most of the teachers described cases of students with multiple potentially challenging features. For example, Teacher 5 mentions both the student's negative attitude towards the subject and his unwillingness to cooperate. The description provided by Teacher 6 points, next to the students' bad attitude, to the issue of lack of motivation. Teacher 8 describes a boy who simply does not study but, at the same time, he does not receive any support from his parents and might be characterised by low self-esteem. Teacher 15 refers to a boy with emotional problems, who seems to dislike English and struggles to communicate with his parents. In turn, Teacher 7 describes an especially complex example:

Teacher 7: This boy is a first-year high school student. He has tremendous problems with concentration and motivation. He also has some emotional problems related to his family situation... There is no progress because of his lack of abilities to work, lack of interest (to listen, read or use some applications to study the language outside the classroom). During classes, he acts against himself, probably looking for attention.

Teacher 7 mentions here a number of different behaviour- and performance-related issues which influenced her perception of this individual. Precisely, the teacher points here to some alleged mental limitations of the person ("tremendous problems with concentration"), emotional problems and behaviours related to them and, on top of that, motivational issues. This description additionally highlights the influence of the student's family environment on his performance at school, but also on the teacher's opinion about this boy.

### **Teachers' Recommendations**

Finally, the teachers who completed the questionnaire were asked about their recommendations for ways of working with a "difficult" student. The gathered suggestions were analysed and grouped into four main categories, including pieces of advice concerning: (1) teaching methods and techniques, (2) general learning philosophy, (3) ways of approaching the individual student, (4) teacher training and wellbeing. Some of recommendations given by the respondents are general in nature, whereas others constitute examples of precise teaching techniques and/or strategies.

The first group of tips encompasses very specific methodological instructions, such as dividing the teaching content into smaller units; focusing on the minimum needed, for example, to pass an obligatory exam; presenting learn-

ing strategies to the student; finding common interests shared by the teacher and student and using them while preparing classroom materials; allowing the student to prepare before performing in front of others. When it comes to the second area of suggestions, that is, the ones related to teaching philosophy (understood here as some general statements about the nature of the teaching-learning processes), the participants recommended that, when working with “difficult” students, even the tiniest progress should be highlighted, and such students should be aware of the fact that it is natural to make mistakes. The third category involves pieces of advice related to the ways in which one should approach a “difficult student”—here the following hints were given: try to boost the student’s self-esteem, self-confidence, and motivation; pay attention, show that you care; make the student feel safe around you; adopt individual approach; express empathy, patience, and kindness. Finally, the last set of recommendation refers to the topics of teacher training and wellbeing—the respondents believe that in order to work effectively with “problematic” students, it is important for a teacher to develop one’s psychological knowledge and look for the causes of the problem; additionally, teachers should not take such situations personally and, if needed, they should not hesitate to ask other professionals for help and advice. There were also voices advocating resignation from further cooperation and recommending another teacher for a particular learner.

In the light of the presented theoretical background, I believe that it is important to finish the presentation of the study results by underlining here that only one participant stated that “there are no hopeless cases.” Another one has also doubts concerning the usage of such a phrase to describe a student. Interestingly enough, the length of teaching service did not translate itself into a bigger number of recalled “problematic” students—the biggest number of “hopeless” learners were given by two novice teachers, including a lady who had been teaching for three months and claimed to have three such cases and the second teacher who stated that 70% of the students in general are actually “hopeless cases.” This particular teacher defines “hopeless cases” as those who do not want to study and are forced by their parents to attend classes. What is especially interesting in this case is the fact that this is an opinion expressed by the only one male respondent who had worked as an English teacher only for 20 months and, at the time of the survey, was not an active teacher. What is more, five teachers with different length of teaching experience (ranging from three to 25 years) stated that they had never had such a student, but most of the respondents could recall at least a few such cases.

## Discussion

The conclusions stemming from the above literature review and the qualitative analysis of the collected data have been divided in accordance with the research questions posed.

### **Do Foreign Language Teachers Label Their Students as “Hopeless Cases”?**

As hinted by Liberman, Woodward, and Kinzler (2017), categorising the elements of reality around us is a part of human nature—in the contemporary world this tendency is also visible in the procedure of hash-tagging. The online posts by foreign language teachers who describe the cases of students perceived by them as difficult, or even hopeless, show that negative labelling in education is a permanently vivid problem. As might be also concluded from the data presented in this article, on their professional way many teachers, regardless of the length of their teaching experience, meet students who constitute some kind of a pedagogic challenge for them, including even individuals who, in their opinion, can be labelled as “hopeless.”

The discrepancy in the number of “hopeless” language learners recalled by the participants of the study might result from different perceptions of such cases or, in other words, subjective understanding of the label, or from the teachers’ different work-related experiences. It is also important to note here that the vast majority of the respondents expressed the belief that such students existed and were able to provide their descriptions.

### **What Is the Teachers’ Perception of “a Hopeless Case”? Are There Any Characteristics Shared by the Students Described by Them as “Hopeless Cases”?**

The reasons behind the procedure of informal labelling a given language learner as “hopeless” differ. The students perceived in this way usually manifest insufficient levels of intrinsic motivation. What is more, extrinsic pressure supposed to encourage such individuals to learn a foreign language seems to bring counterproductive results. Other features often recognised as those characterising students described as “hopeless” include: being labelled, both formally and presumably, as a student with learning difficulties and/or special educational needs; having family-related and/or overall emotional problems; manifesting disruptive behaviours, inaction or lack of cooperation; inability

to choose and apply appropriate learning strategies; noticeable aversion to the subject, learning situation and/or the teacher.

As pointed out by Becker (1963), Lemert (1967), and Bernburg (2009), labelling a student in an unfavourable way might lead to occurrence of other problems. This dependence seems also to be reflected in the provided descriptions, as most of the mentioned students were sources of multiple didactic challenges for their teachers. For example, formally labelled learners seem to constitute as especially challenging group to be taught, as they were often enumerated among individuals further labelled as “hopeless cases.”

### **What Are the Teachers’ Recommendations for Those Working with Such Students?**

Although most of the teachers who participated in the study expressed the belief that there are some hopeless cases when it comes to foreign language learning, they were also ready to share some pieces of advice for those who struggle with problematic students. I believe that this fact gives some room for optimism—if the teachers continue to make an effort, maybe the label “hopeless case” is just a hashtag reflecting their struggles and drawing the attention of those who can help them with their challenges.

The recommendations provided by the study participants illustrate the complexity of the teacher’s work. When dealing with “difficult” students, one needs to start with adjusting their philosophy of teaching, as with such learners, special adapted didactic methods and techniques might be needed. Apart from the constant control of the teaching-learning processes, teachers should also take care of teacher-student-parent relationships. Finally, as working with “problematic” students is mentally burdensome, educators need to take care of their own mental health and wellbeing. On top of that, in some cases, resignation from further cooperation might be the only solution—still, such a comfort is usually granted to teachers working in private schools or the ones dealing with individual learners. This final piece of advice shows teachers’ understanding of the importance of teacher-student relationships and seems to suggest that the “hopelessness” of a given language learner can be unique to a given learning context.

### **What Gaps in Teachers’ Knowledge and Training Might Be Indicated by the Application of Such a Label in Relation to Their Students?**

I would like to underline here that the descriptions provided by the teachers, including the ones presented in this article, might help us understand the way

in which opinions about students are formulated, but also point to the areas in which teachers may need assistance and training. The areas identified in the study as the ones in which teachers seem to struggle highlight the need of more extensive psychological and pedagogic training. Consequently, as also suggested by Rymarz (2004) and Lauchlan and Boyle (2020), teacher training courses, including the ones for foreign language teachers, should also focus on the selected issues from the fields of developmental psychology (in order to know how to motivate students of different ages, to know how the self-concept and identity are formed); social/socio-educational psychology (to know how to deal with students' emotions, disruptive behaviours or aggression; to be able to communicate with parents and supervisors) and special pedagogy (in order to pre-diagnose students and work with the already diagnosed ones).

To sum up, it is important to underline after Guichard and Dumora (2008) that the role of teachers in the process of students' self-construction cannot be undervalued. Constituting an important source of self-knowledge for their students, educators not only shape the educational process itself, but also influence students' growth and the development of their individual dispositions and self-perceptions. Therefore, in the light of the assumptions of the labelling theory, teachers should be particularly careful when making and expressing judgements about their students' intellectual abilities and potential.

I believe that this study can serve as an inspiration for further research on the issue of labelling in the context of foreign language education, especially the one conducted on the boundaries of discourse analysis, applied linguistics and psychology. As pointed out by Bernburg (2009), there is a pressing need to investigate the phenomenon of informal labelling—the issues worth addressing include, for example, the exploration of the potential link between informal labelling in the school context and life chances; or the experience of being labelled from the student's perspective. Simultaneously, I am aware of the study's shortcomings resulting, among others, from my inability to analyse greater number of cases, which would allow for taking into consideration such individual variables as students' gender, age or even length of contact with a foreign language.

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Katarzyna Nosidlak

## **Ein hoffnungsloser Fall oder eine harte Nuss zum Knacken? Über „schwierige“ Schüler im Fremdsprachenunterricht**

### Zusammenfassung

Nach der Etikettierungstheorie kann die verbale Etikettierung einer Person erhebliche Auswirkungen auf ihr Selbstwertgefühl haben, was wiederum häufig das menschliche Verhalten bestimmt. Auch im Bildungskontext kann ein solcher Prozess der vereinfachenden Etikettierung von Schülern tiefgreifende Konsequenzen psychologischer Natur haben. Im vorliegenden Artikel werden in erster Linie die Ergebnisse einer Studie dargestellt, in der 37 Englischlehrer über Schüler berichteten, welche sie als die schwierigsten Fälle in ihrer bisherigen Laufbahn bezeichneten. Eine qualitative Analyse der gesammelten Berichte ermöglichte es, einige gemeinsame Merkmale der so genannten hoffnungslosen Fälle zu identifizieren. Die Schüler wurden häufig als Personen ohne Lernmotivation charakterisiert. Außerdem hielten die Studienteilnehmer in vielen Fällen Schüler mit sonderpädagogischem Förderbedarf für besonders „schwierig“. Die Berichte der Studienteilnehmer können dabei behilflich sein nachzuvollziehen, wie Meinungen über Schüler gebildet werden, und weisen auf die Notwendigkeit wesentlicher Änderungen im Bereich der Aus- und Weiterbildung von Sprachlehrern hin.

*Schlüsselwörter:* Lehrerbildung, Etikettierung, Fremdsprachenunterricht, Bildungssoziologie, Etikettierungstheorie, schwierige Schüler

Appendix

## **The Hopeless Case—Translated Version of the Questionnaire for Polish Teachers of Foreign Languages**

1. I am...
  - female
  - male
  - not listed
  - prefer not to answer
  
2. I teach... (You can mark more than one answer)
  - English
  - German
  - French
  - Spanish
  - Russian
  - Other(s): .....

3. How long have you been working as a foreign language teacher?

.....

4. Where are you working currently? (You can mark more than one answer)

- at a nursery or kindergarten
- at a state primary school
- at a state secondary school
- at a private language school
- at a university/college
- with individual students
- other(s): .....

5. How old are your students? (You can mark more than one answer)

- 0–3 years old
- 4–6 years old
- 7–10 years old
- 11–15 years old
- 16–19 years old
- I work with university/college students
- I work with adults (i.e., those who finished their education)
- other(s): .....

6. How do you understand the phrase “hopeless case” in the context of foreign language education?

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7. How often do you deal with such cases? How many “hopeless cases” can you recall?

.....  
.....  
.....

8. Imagine that you are writing an essay entitled “My hopeless case.” Please describe the student whom you consider to be the best illustration for the hashtag “hopeless case” in the context of teaching/learning a foreign language (do not include personal details – still, you can use the first name, specify age/gender/language level and learning context). Why does this person deserve such a “tag”?

Ps. You can also write—"I have not had such a case."

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9. Have you finally found a way to work with your "hopeless case"? How did your cooperation end? Or is it still going on?

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10. In the context of the topic under discussion, do you have any pieces of advice for teachers who are currently working with "hopeless cases"?

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11. Have you noticed any individual traits (personality, character) common for "hopeless cases"?

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Write your comments, remarks, or reflections here:

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## **Tools for Scaffolding the Development of L2 Speaking in English-medium Higher Education: Lessons from Poland and Australia**

### **Abstract**

Participating in oral L2 communication may be challenging for English-medium higher education students. While literature suggests that scaffolding facilitates the development of L2 speaking, research has not addressed the notion of tools for scaffolding its development. The aim of this study is twofold: (1) to investigate how scaffolding can be embodied in tool design to support L2 speaking and (2) to obtain and analyse student perceptions of the tools. We draw on questionnaire data gathered in two iterations of a larger design-based research study conducted in two contexts: English Studies students in Poland ( $N = 26$ ) and culturally and linguistically diverse L2 learners in Australia ( $N = 12$ ). This study illustrates how features of scaffolding were applied to map instructor, peer- and technology-based tools in terms of learning activities, resources, technology and feedback. The results suggest that these tools may cater to the multiple levels of student understanding and skill with regard to the development of L2 speaking found in modern L2 classrooms..

*Keywords:* scaffolding, L2 speaking, higher education, Poland, Australia

In English-medium higher education (EMHE) settings,<sup>1</sup> international students in English-dominant countries and some domestic students in non-English-dominant countries use English as a second or foreign language (ESL or EFL respectively; L2 henceforth) to communicate in a variety of genres, such as presentations, discussions, debates, with instructors and peers (Hyland, 2009; Wingate, 2015). Since L2 speech production is a complex and demanding cognitive activity (Bygate, 1987, 2009; De Bot, 2000; Kormos, 2006), participating in oral L2 communication and abiding by genre conventions may be challenging for these students. As illustrated in Levelt's (1989) model of speech processing and echoed in Kormos's (2006) elaboration concerning L2 speech production, students may encounter problems while planning content for speaking (conceptualization), turning ideas into sentences (formulation), and audibly expressing their thoughts (articulation) when their language competences (i.e., linguistic, discursive, strategic, and sociolinguistic) and world knowledge are limited (Chapelle et al., 1997) and/or when their knowledge of the elements of the target L2 is not automatized (DeKeyser, 2015, 2017). Although various courses and preparation programmes are offered to help EMHE students develop L2 skills, speaking English can still be difficult (McRae, 2018; Yates & Wahid, 2013). In addition, some students might be afraid of making mistakes, lack confidence while speaking and be reluctant to speak in class (Haidara, 2016). Finally, the utility of the offered courses may vary in educational contexts that include homogenous groups of non-native speakers learning L2 in a non-Anglophone country (such as Poland) and heterogeneous groups of non-native speakers learning L2 in an Anglophone country (such as Australia). Hence, taking steps to better support the development of English speaking skills among these students is of great importance and one way of doing so would be by scaffolding student learning with the use of adequate tools.

The pedagogical concept of scaffolding has been subject to research by scholars and educators in the field of L2 learning and teaching (e.g., Gagné & Parks, 2013; Hammond & Gibbons, 2001; Li & Zhang, 2020; Mercer, 1994; Walqui, 2006; Walqui & Van Lier, 2010). There is also a growing body of research into scaffolding conducted in the area of computer-assisted language learning (Botero et al., 2019; Chang & Sun, 2009; Chen & Tseng, 2021; Cheng, 2010; Fan & Chen, 2019; Hsieh, 2017, 2020; Jin, 2013; Lee, 2008; Li, 2010; Liou et al., 2006; Mills & Kennedy, 2013; Narayanan & Kumar, 2019; Nielsen, 2014; Ozaki & Ueda, 2021; Rezaee et al., 2015; Todd, 2014; Wu et al., 2012; Xu &

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<sup>1</sup> Differing from English language courses, English-medium instruction is delivered in English-dominant countries (Australia, the UK, etc.). This form of bilingual education is popular in Asia, it is offered to domestic and international students in e.g., Korea, China, etc. (Hu & Wu, 2020) and is also present in many European universities, as a result of the Bologna process promoting student mobility (Evans & Morrison, 2011). English-medium instruction prevails in language-related programmes such as English Philology, English Studies, Applied Linguistics, etc.

Xia, 2021). With regard to scaffolding the development of L2 speaking, the term has been used to refer to various classroom strategies (Ahmadpour et al., 2016; Gerakopoulou, 2016; Ghasedi et al., 2018; Zarandi & Rahbar, 2016), specific teacher-led activities, such as, for example, warm-up, pairwork and introduction of new language (Gilead, 2018), corrective feedback (Shooshtari et al., 2018), peer interactions (Ahmadpour et al., 2016; Azir, 2019; Nguyen, 2013), and technology (Kozar, 2016; Mirahmadi & Alavi, 2016; Tudini, 2003). While these studies suggest that scaffolding facilitates the development of L2 speaking ability, research has not explicitly addressed the notion of tools for scaffolding the development of speaking skills. Due to this lack of both theoretical and empirical studies, it remains unclear how to integrate tools to scaffold the development L2 speaking for academic communication. Therefore, as speaking skills are central for a successful academic career in EMHE, articulating and integrating tools into instruction for scaffolding the learning process of diverse learners found in L2 classrooms in EMHE contexts is urgently needed.

When setting out to undertake empirical work in an under-researched area, it is essential to organise our knowledge of the issue at hand as an initial research step. Hence, in the first part of this paper, the purpose is to systematise our knowledge of scaffolding the development of L2 speaking skills with the use of tools, drawing on the conceptualisations in the existing literature. This research activity is a prerequisite for designing our empirical study. In the second part of this paper, the aim is to confront our theoretical considerations with the empirical reality by developing and evaluating the pedagogy for integrating tools for scaffolding the development of L2 speaking. Specifically, in this study, we seek to investigate how scaffolding can be embodied in tool design to support L2 speaking developmental processes in EMHE classrooms. To that end, we describe the tools we used in L2 speaking courses, the selection of which was grounded in the identified theoretical approach. Second, we seek to obtain and analyse student perceptions of these tools. With this in mind, we draw on questionnaire data gathered in two iterations of a larger ongoing design-based research (DBR) study conducted in two learning contexts: English Studies students in Poland and culturally and linguistically diverse (CALD) L2 learners in Australia. In this study we assume the sociocultural perspective to view tools as symbolic (e.g., concepts) and material (e.g., computers) artefacts that mediate human cognitive activity (Lantolf et al., 2015; Vygotsky, 1978) that can be organised to scaffold (Wood et al., 1976) the development of L2 speaking skills. Analysing students' perspectives from different contexts will help establish the extent to which the tools support students' learning.

Research activities reported on in the current paper serve to refine and clarify the concept of scaffolding in the area of L2 learning and teaching, organising our theoretical knowledge concerning the problem under study. Findings from this study also make contribution to practice with regard to the

design and development of pedagogical tools that scaffold the learning process in modern higher education L2 classrooms.

## Literature Review

### Scaffolding Learning

The concept of instructional scaffolding has its roots in sociocultural theory and Vygotskian assertion (Vygotsky, 1978) that learning, including L2 learning, occurs with the assistance of capable others that allows progress from the stage at which performance is demonstrated to a learner to the stage where they are able to perform the activity independently (Storch, 2017). New abilities are learned when they are internalised, that is, transferred from the interpersonal plane into the intrapersonal plane (Lantolf et al., 2015). Expanding this view, Wood, Bruner, and Ross (1976) applied the metaphor of scaffolding to denote an “adult controlling those elements of the task that are initially beyond the learner’s capacity, thus permitting him to concentrate upon and complete only those elements that are within his range of competence” (p. 90). Through scaffolding a learner is capable of conducting a task that is otherwise not attainable and the support is removed when independent performance is viable (Belland, 2017). Examples of support include modelling, demonstrating features of the task, questioning and providing hints to aid learner reflection (Puntambekar & Hubscher, 2005).

Instructional scaffolding is characterised by a number of features. In the broader field of education, Puntambekar and Hubscher (2005) assert that scaffolding should encompass: (1) a shared understanding of the goal of the activity (intersubjectivity)—ensuring that the learner knows when the task is completed successfully; (2) ongoing diagnosis—determining learner’s current level of understanding and performance in order to establish the right level of support needed; (3) graduated assistance (calibrated support)—based on the outcomes of the diagnosis, matching the support with the current needs of the learner; and (4) fading—eventual removal of support when a learner is able to perform independently. In the area of L2 learning, Van Lier (2004) argues that aspects such as continuity, contextual support, intersubjectivity, contingency, handover/takeover, flow (p. 151) are essential, whereas Hammond and Gibbons (2001) note the following: extending understanding, temporary support, macro and micro focuses (pp. 15–18). Although the understanding of the

concept of scaffolding does not diverge among the abovementioned and other authors, from an instructional design point of view it is important to pinpoint the theoretical features of scaffolding with precision in order to define criteria for the selection and organisation of tools for scaffolding learning. We regard the elements of scaffolding suggested by Puntambekar and Hubscher (2005) as easily translatable into L2 instructional design and, for this reason, we use the elements proposed as the criteria guiding the design of tools for scaffolding the development L2 speaking in EMHE courses.

Furthermore, apart from the identification of key elements, literature offers the categorisation of scaffolding according to who or what regulates the support. According to Belland (2014, 2017), scaffolding can be provided by:

- Teachers (one-to-one scaffolding): one teacher works with one student, provides learning activities, models, questions, explanations, hints, and feedback. Although this form of scaffolding is considered most beneficial, classroom realities limit opportunities for one-to-one scaffolding.
- Peers (peer scaffolding): support is provided by equally or more capable peers, for example through feedback. Despite one-to-one interaction that can be rendered, peer scaffolding may not be sufficient or adequate for learning.
- Computers (computer-based scaffolding): a computer is used for completing tasks.

This distinction is valuable while designing tools for scaffolding: it broadly indicates the types of agents that may be resorted to while planning and organising the provision of tools in modern EMHE classrooms, in which exclusive instructor-based one-to-one scaffolding cannot usually be warranted.

## **Tools for Scaffolding Learning**

Literature in the area of scaffolding in broader education and L2 learning refers to tools as scaffolds, providing scaffolding, or providing support (Goh, 2017; Puntambekar & Hubscher, 2005). Learning activities, paper-based or software tools, curricula, resources, artefacts, environments, as well as teachers and peers, are all considered as potential providers of support (Belland, 2017; Goh, 2017; Puntambekar & Hubscher, 2005). There is also some elaboration on specifying tools used for matching elements of scaffolding in classrooms, as summarised in Table 1.

**Table 1**

*Tools for Scaffolding Learning (Based on Belland, 2017; Puntambekar & Hubscher, 2005)*

Element of scaffolding	Examples of tools for scaffolding
Intersubjectivity	a launcher unit, staging activities;
Ongoing diagnosis	a teacher asks questions or observes student performance;
Graduated support	explanation, clarification, encouraging participation, modelling desired performance;
Fading	strategies provide decreasing support over time and are ultimately withdrawn;

Yet, this literature does not explicitly define the very concept of “tools.” As a result, it has been variably used to refer to instructional support. For example, Puntambekar and Hubscher (2005) use this term interchangeably with reference to an overarching category of different type of support provided (as, e.g., suggested in the title of the article “Tools for Scaffolding Students in a Complex Learning Environment”) or to denote one of the ways students can be lent support (as in “tools, resources, and curricula,” p. 7).

Hence, in this study, we return to the theoretical origins of scaffolding in order to conceptualise tools for supporting the development of L2 speaking through the lens of sociocultural theory. From this perspective, human mental functioning and development is viewed as a mediated process, wherein physical and conceptual tools are used to regulate and organise one’s activity or behaviour (Engeström, 2001; Lantolf et al., 2015; Vygotsky, 1978). While physical tools involve the manipulation of objects to accomplish a task, conceptual tools are used to interact with others and/or to impact others’ behaviour (Engeström, 2001; Hampel, 2019; Ma, 2017). Furthermore, according to this theory, mental development consists in “gaining greater voluntary control over one’s capacity to think and act either by becoming more proficient in the use of mediational resources, or through a lessening or severed reliance on external mediational means” (Lantolf et al., 2015, p. 209). Within this process, humans develop by transitioning from external object- and other-regulation towards self-regulation, which is the ultimate goal of learning. In L2 learning, object-regulation refers to the use of artefacts that enable cognitive activity (e.g., an online translator or software for oral presentations), other-regulation entails the presence of other people (e.g., teacher providing hints or feedback on language), and self-regulation characterises learners with internalised object- or other-regulated forms of mediation (Lantolf et al., 2015).

What this means for the present study is that L2 learning, including the development of L2 speaking skills in EMHE, can be scaffolded with the as-

sistance of external (physical and conceptual) tools, afforded through objects and other people. Furthermore, scaffolding learning entails creating spaces that guide individual L2 learners towards self-regulation in their L2 use. This necessitates providing learners with opportunities to achieve mastery of the skill to the extent to which external tools—object- or people-based—are no longer indispensable to act. Therefore, for the purpose of the current study, we define tools as physical and conceptual artefacts that can be intentionally organised to support the development of L2 speaking skills. This understanding yields the following instantiations of tools that can be applied to scaffold learning: learning activities, learning resources, instructor- and peer-based feedback and technology.

### **Tools and Scaffolding the Development of L2 Speaking**

Goh (2017) defines scaffolding in L2 speaking as “the process by which teachers provide helping activities to enable learners to accomplish a speaking task which they would otherwise have been unable to do well on their own” (p. 248). The same author envisages scaffolding for the development of speaking skills in terms of the provision of learning activities that allow learners to progressively build autonomy in task execution. Through scaffolding activities learners are helped while planning and organising speech. As an intentional pedagogical strategy, “scaffolding activities can be added on to regular speaking practice tasks to help learners become aware of speech processes and perform better” (Goh, 2017, p. 248).

Apart from the abovementioned work, a limited body of empirical studies have looked into the process of scaffolding L2 speaking. One strand of research describes how scaffolding is applied by teachers in L2 classrooms in an attempt to make sense of what is happening in the classroom by capturing the existing strategies that teachers apply to support their students’ L2 use and learning (Gerakopoulou, 2016; Gilead, 2018). Aside from this research, there are studies that focus on the role of peers in scaffolding processes, that is, providing peer scaffolding in a collaborative presentation task (Nguyen, 2013), peer-scaffolded tasks (Azir, 2019), and group work with peer assessment and scaffolding (Ahmadpour et al., 2016). The next strand of research comprises interventionist studies that optimise the development of L2 speaking and explore the effect of scaffolding strategies on L2 speaking (Mirahmadi & Alavi, 2016; Zarandi & Rahbar, 2016). The studies in the last group examine the effectiveness of scaffolding interventions with the use of various scaffolding strategies (Ghasedi et al., 2018; Shooshtari et al., 2018).

The rapid development of Web 2.0 tools including learning management systems such as Blackboard or Moodle, as well as increased opportunities for

authentic communication practice in the L2, has resulted in significant learning gains including improved L2 language skills (Levy, 2009; Chang & Windeatt, 2021a; 2021b). These tools have expanded opportunities for online and blended learning by allowing students to practise skills and collaborate on tasks outside of the classroom (Barrett & Liu, 2016; Chang, Power, & Windeatt, 2022), resulting in a more flexible learning environment (Liu, 2011). The technology for audio recording has also advanced to the point where students can easily record themselves speaking and share their recording using portable (mobile) devices (Chang & Windeatt, 2021b), as well as allow teachers to provide regular feedback to students (Moneypenny & Simon, 2017).

In sum, the existing research gives insight into the ways learners can be supported while they develop L2 speaking skills and the relevant findings point out that scaffolding—be it teacher-, peer- or technology-based—helps L2 learners enhance their speaking performance. However, the scholarship in the area of scaffolding the development of L2 speaking remains modest and many important issues are still unresolved. First, intervention studies overviewed above either tend to overlook the theoretical features of scaffolding (e.g., inter-subjectivity, ongoing diagnosis, graded support, and fading) while planning L2 speaking instruction or seem to grapple with incorporating scaffolding criteria in L2 instruction. Next, the concept of tools is absent from L2 speaking literature and so is the arrangement of tools that can be applied in the scaffolding process. Moreover, research has not yet included EMHE L2 students who need to develop L2 speaking skills for academic communication. Finally, despite the enormous potential of technology to scaffold the development of L2 speaking, this area has received very little attention. As noted by Goh (2017), “[i]t is worthwhile for researchers to consider how technology can be harnessed not just for practising speaking but also providing cognitive support in thinking and planning for learners during speech processing as well as developing discourse skills for face-to-face interactions” (p. 258). Consequently, it is unclear how tools can be employed to support the development of L2 speaking for EMHE students with diverse levels of proficiency often found in language classrooms, and how the scaffolding can be faded.

## Method

This exploratory study set out to investigate how well design ideas are embodied and enacted in tools implemented to scaffold the development of EMHE L2 speaking skills in speaking courses taught in two learning contexts of Polish and Australian universities. Defining tools for scaffolding the develop-

ment of L2 speaking skills as physical and conceptual artefacts, intentionally organised to support the development of L2 speaking skills, encompassing learning activities, learning resources, instructor- and peer-based feedback, as well as technology, the following research question was addressed: From the students' (users') perspective, do the tools (i.e., activities, resources, feedback, and technology) embedded in the designed L2 speaking courses support the development of L2 speaking skills of the L2 learners set in two distinct educational contexts? If so, how?

Taken the role of social and material contexts envisioned in sociocultural theory, tools may work differently across L2 classrooms. By analysing student perceptions of tools used in two different settings, we hope that the findings will provide context-sensitive theoretical insights that will underpin the designs of future similar-type interventions for developing L2 speaking skills in EMHE. The results of the study also influence practice as students' perceptions of the tools can be used in course development in forthcoming sessions.

## Research Design

In order to answer the research question, the present study uses part of the dataset obtained in two cycles of a larger design-based research (DBR) project which iterated to develop, implement, and evaluate an L2 speaking course for academic communication, with the ultimate aim of generating design principles for L2 speaking courses (Pitura, 2022). The DBR approach is defined as “a type of participatory research in which researchers and practitioners collaborate toward a common goal, namely creating new understanding of an educational intervention or issue through the progressive refinement or improvement of a design” (Rodríguez, 2017, p. 364). Accordingly, DBR provides a methodological framework allowing researchers and practitioners to work together towards solving practical problems, develop, and implement solutions in real classrooms by using multiple methods to collect and analyse data, and refine design principles to advance new theoretical and practical knowledge (Anderson & Shattuck, 2012; Reimann, 2011; Rodríguez, 2017).

In the current study, two researchers-practitioners collaborated to meet the challenge of developing speaking skills in their EMHE L2 classrooms. In line with the longitudinal and cyclical nature of the DBR approach, at the first phase, the tools were designed, developed, and pilot-tested by the first author (Joanna Pitura) at a Polish university in an L2 speaking course offered to undergraduate English Studies students in the 2018/2019 academic school year. These tools were next refined and implemented in another sociocultural context by the second author (Heejin Chang) at an Australian university in an L2 speaking course for CALD students during two sessions in 2020. With

the aim of testing the tools in different sociocultural conditions, Australian university was considered suitable as the next iteration of this research project. Given the exploratory nature of this study, qualitative data constituted the main source of information about the tools, while quantitative data were given less weight in data collection and analysis, serving a supplementary role. In this DBR study, we analyse and report on the same constructs under different conditions (Rodríguez, 2017). This user-based information will help evaluate the tools used and generate design principles for scaffolding L2 speaking courses.

In both educational contexts the tools were incorporated to help students meet the following course aims: (1) the development of spoken genre-based oral presentation and spoken interaction language activities (Council of Europe, 2001, 2018): presentations/talks, debates, discussions, interviews, conversations and chats, (2) the enhancement of the quality of spoken L2 at the B2+ level (Council of Europe, 2001, 2018) in terms of the range of vocabulary, accuracy, fluency, pronunciation, and coherence in spoken English, and (3) the expansion of students' general knowledge. The following tools were employed: (1) learning activities (i.e., reading to talk about current affairs, reading for summarising in class, podcasting, learning, and practising specific spoken genres), (2) learning resources (i.e., course materials made available on Moodle), (3) feedback (instructor- and peer-based), and (4) technology (Moodle, SoundCloud/Voice Thread), as presented in Table 2.

**Table 2**  
*Summary of Course Tools*

Tool type	Cycle 1	Cycle 2
Learning activities	<p><u>Before the course:</u> self-assessment of L2 speaking, reflection on speaking skills;</p> <p><u>Before each class</u></p> <ul style="list-style-type: none"> <li>• preparing to talk about current affairs;</li> <li>• reading an article of students' choosing to be summarised in class;</li> <li>• recording a podcast using the SoundCloud application (3-minute talk on an instructor-assigned theme connected to technology) in line with the assessment criteria;</li> </ul> <p><u>In each class</u></p> <ul style="list-style-type: none"> <li>• Step 1. A conversation on current affairs; pairwork; 10 mins;</li> <li>• Step 2. Summaries of students' articles and a conversation on the related issues; pairwork, 5 minutes for each partner;</li> </ul>	<p><u>In first class:</u> self-assessment of L2 speaking, reflection on speaking skills;</p> <p><u>Before each class</u></p> <ul style="list-style-type: none"> <li>• preparing to talk about current affairs by pasting links to the article in a designated online space;</li> <li>• recording a podcast using the VoiceThread application (3-minute talk on an instructor-assigned theme);</li> </ul> <p><u>In each class</u></p> <ul style="list-style-type: none"> <li>• Step 1. Presenting a summary of what students read; 5–10 mins;</li> <li>• Step 2. Provide comments, referring to the assessment criteria listed in the task;</li> </ul>

	<ul style="list-style-type: none"> <li>• Step 3. Evaluation of partner's podcasts; students access partner's podcast using a QR code displayed on the Moodle site, listen to it using own headphones and take notes for feedback, referring to the assessment criteria listed in the task; pairwork; approx. 10 mins;</li> <li>• Step 4. Spoken genre presentation and practice; whole group, pairwork, individual; approx. 60 mins; <u>In last class:</u> assessment: a test on vocabulary, self-assessment of L2 speaking and genre-based speaking skills;</li> </ul>	<ul style="list-style-type: none"> <li>• Step 3. Spoken genre presentation and practice; whole group, pairwork, individual; approx. 60 mins;</li> <li>• Step 4. A vocabulary test; <u>In last class:</u> self-assessment of L2 speaking and genre-based speaking skills;</li> </ul>
Learning resources	<p><u>Of instructor's choice:</u> Moodle modules; units from <i>Academic Vocabulary in use</i> (McCarthy &amp; O'Dell, 2008); online content, i.e. YouTube videos, links to websites and blogs;</p> <p><u>Of students' choice:</u> online articles, websites, blogs;</p>	The same;
Feedback	<p><u>In class:</u> from instructor and peers</p> <p><u>Out of class:</u> from instructor—assessment of the submitted podcasts; feedback on L2 (the indication of errors, e.g., mispronounced words, grammar mistakes, inadequate structures) and genre-based speaking, sent to individual ss via Moodle;</p>	<p><u>In class:</u> from instructor and peers</p> <p><u>Out of class:</u> from instructor—assessment of the submitted podcasts; feedback on L2 (the indication of errors, e.g., mispronounced words, grammar mistakes, inadequate structures) and genre-based speaking, in person;</p>
Technology	<p><u>In class:</u> university computer and projector</p> <p><u>Out of class:</u> students' computers and/or smartphones</p> <p><u>Both:</u> SoundCloud application, Students' smartphones, Moodle.</p>	The same; using VoiceThread instead of SoundCloud.

Scaffolding was achieved by capturing the four elements of intersubjectivity, graduated support, ongoing diagnosis, and fading (Puntambekar & Hubscher, 2005). Scaffolding was provided by the instructor, peers, and technology (Belland, 2017), that is, through the Moodle learning management system. Various tool types for in- and out-of-class use were selected to match with the four elements of scaffolding (Table 3).

**Table 3***Overview of Scaffolding with the Use of Tools*

Element of scaffolding	Form of scaffolding	Type of tool	In-class use	Out-of-class use
Inter-subjectivity	Moodle-based	Activities	Staging activities; Cycle 2 only: Introductory module;	Cycle 1 only: Introductory module;
		Resources	YouTube videos, websites, blogs; Cycle 2 only: Links to CEFR level descriptors;	Cycle 1 only: Links to CEFR level descriptors;
Graduated support	Moodle-based	Activities	Staging activities; <i>Academic English Vocabulary in Use</i> (McCarthy & O'Dell, 2008);	Voice recording; Reading for speaking;
		Resources		Online articles, websites;
	Peer-based	Activities	Pair/groupwork;	
		Resources		Peer podcasts;
		Feedback	On voice recording;	
	Instructor-based	Feedback	On in-class genre-based L2 performance;	
Ongoing diagnosis	Moodle-based	Activities	Vocabulary tests; self-assessment of spoken L2 proficiency; reflection on genre-based speaking skills;	
		Resources	Links to CEFR level descriptors;	
	Instructor-based	Feedback		Assessment and comments on voice recording;
		Technology		Cycle 1 only: Moodle messenger;
Fading	Moodle-based	Activities	Genre based instruction;	Script-based or plan-based voice recording activity, decided by the student;
		Resources	Use of reference materials as much and long as needed.	Use of reference materials as much and as long as needed.

With regard to *intersubjectivity*, in order to create a shared understanding of the learning goals vis-à-vis their actual performance, students used Moodle-based activities and curated resources that familiarised them with spoken genres and target L2 quality (B2+ level). At first, students engaged in the activities included in the introductory module that comprised an overview of course aims, assignments, etc., as well as self-assessment of spoken L2 proficiency and reflection on genre-based L2 speaking skills. In class, shared understanding of spoken genres was achieved through staging activities, one text (genre) type per module. These activities introduced students to the following genres: self-presentations, presentations/talks, debates, discussion, interviews, chats/conversations. In each module, following genre-based instruction (Hyland, 2003, 2007, 2008, 2018; Richards & Rodgers, 2014), the activities were organised to help students reflect on their experience with given genres (“Building the context”) and to model the speaking activity (“Modelling and deconstructing the text”). These activities were supplemented with online resources, that is, YouTube videos, websites, and blogs. All these tools were intended to help students grasp the understanding of L2 spoken text quality and structure which they were expected to produce.

As to *graduated support*, students were provided with (1) Moodle-, (2) peer, and (3) instructor-based opportunities to practise speaking and receive continuous assistance. First, Moodle-based staging activities supported the practice of genre-based speaking. In class, students co-created spoken interaction texts with their partners (“Joint construction of the text”), produced texts individually (“Independent construction of the text”) and distinguished text types one from another (“Linking to related texts”) (Hyland, 2003, 2007, 2008, 2018; Richards & Rodgers, 2014). Through voice recording (podcasting) activities, students practised oral production texts (self-presentations and talks). This activity aimed to help students engage in the systematic practice of speaking out-of-class, using suggested resources (websites) to learn about the topics of their talks. All the topics were related to technology and aimed to familiarise students with various aspects of digital literacy. If students felt insecure, they could write the script of the text in L2 and then read it while recording. Additionally, in order to help students note and put to use desirable L2 vocabulary and grammar, students used designated units from *Academic English Vocabulary in Use* (McCarthy & O’Dell, 2008). To enable the acquisition of content for speaking, students read extensively out-of-class. The support included recommended websites to read to be familiar with current affairs (e.g., [www.bbc.com/news](http://www.bbc.com/news)) and to summarise content in class (e.g., websites of *Nature*, *New Scientist*, *Scientific American*). Second, peers provided support through pair-and groupwork activities, in which students had partners and audience to engage with while speaking and to receive immediate feedback on performance. Peer podcasts that were accessible for all course participants through Moodle also served as resources in the form of the models that could be imitated.

Third, instructor-based feedback in class aimed to modify students' genre-based L2 spoken performance. These tools were selected to support diversity in the classroom by accommodating students of different levels of proficiency and backgrounds as they develop mastery in L2 speaking. Through the use of these tools, students were provided with structure and guidance in- and out-of-class whenever they constructed their own spoken texts. Although technology-based support was the same for all students, individual feedback that emerged in the interaction with peers and the instructor was to trigger the use of the affordances of technology-based tools (that were earlier employed to achieve intersubjectivity), according to their shifting needs.

Concerning *ongoing diagnosis*, throughout the course, students' speaking skills were regularly assessed by instructors to provide students with further assistance. This included regular in-class monitoring of student performance and out-of-class assessment of students' voice recordings. Furthermore, students did online vocabulary tests to ensure that they build an appropriate range of L2 vocabulary for academic communication. On course completion, students self-assessed their L2 speaking skills and reflected on genre-based performance. These tools allowed instructors to spot challenges in student speaking and react by adjusting instruction.

*Fading* of support was accomplished by means of two activities: (1) staging genre-based instruction activities with supplementary reference resources and (2) voice recording (podcasting) activities with supplementary reference resources. In staging activities support was faded automatically at the independent construction phase as it was assumed that students would become capable of independent activity by then due to the sequence of instructional activities. At all stages students could use Moodle-based reference materials as much and as long as they needed. In voice recording activities students themselves could fade the support. Specifically, students were allowed to write full scripts of their talks and then to make the recording by reading it. When they gained confidence in performing this activity, they recorded the talks using a plan only. While preparing their scripts or plans, students could also use Moodle-based reference materials when necessary. Through this strategy, students were provided with an opportunity to practise organising the talk and selecting appropriate language.

## Participants

With the view to evaluating the utility of the designed tools in different sociocultural contexts, the participants comprised two distinct groups of EMHE students: a (near) homogenous group of non-native speakers set in a non-Anglophone country (Poland) and a heterogeneous group of non-native

speakers set in an Anglophone country (Australia). The Polish group (PG) included 26 EFL undergraduate English Studies students in their second year of an extramural BA-level programme, participants of a compulsory one-semester (18 hours) “Discussions” course form the first cycle of the DBR project. They were in their 20s and 30s, speakers of Polish as L1, one student’s linguistic context being Ukrainian as L1. Their English language proficiency was varied, around the area of the B2 level, according to the CEFR scales (Council of Europe, 2001, 2018). The Australian group (AG) included 12 ESL students from a variety of nationalities (i.e., Afghanistan (1), China (2), Congo (2), Syria (2), Iraq (2), South Korea (2), and Venezuela (1)) studying at an undergraduate level at an Australian university. They were in their 20s and early 30s. They had been residents of the country from a week to five years before the course commenced. They attended a one-semester in-session language and study skills programme “Academic Speaking and Listening,” 12 hours per week for 10-weeks, within which the speaking content was used for four hours per week. Student level on entry to the course was IELTS 5.0 to 5.5 (B1 equivalent). All the participants provided informed consent in writing.

## **Data Collection**

Data used in this study were gathered by means of a self-report pen-and-paper questionnaire containing closed-ended items and open-ended questions formulated in the English language. As this study was implemented in real classrooms, student involvement was considered essential in the research process. Students’ perceptions regarding the use of tools influence their learning during the course, the understanding of which is important for course designers and practitioners. This knowledge can help better design speaking courses and facilitate student learning.

The current study uses part of a large dataset and considers five groups of items that investigated student tool perceptions in terms of in- and out-of-class activities, learning resources, feedback from peers and the instructor, and technology.

### ***Out-of-class Activities***

With the use of three items, students were asked to evaluate how helpful homework assignments were for developing their speaking skills: “Reading articles to be summarised in class,” “Reading about current affairs to be discussed in class,” “Podcasting about technology-related aspects.” Responses ranged from 1 (“not helpful at all”) to 5 (“very helpful”). Additionally, students were invited to elaborate on their responses (“Why?”).

### ***In-class Activities***

Five closed-ended items were worded: “What I did in class helped me improve my discussion/interview/conversations/debating/presentation skills.” Students’ responses were recorded on a 5-point Likert type response scale (1 = “disagree,” 5 = “agree”).

### ***Learning Resources***

Six closed-ended items were worded: “Course materials provided on Moodle helped me improve my discussion/interview/conversations/debating/presentation skills.” Again, students’ responses were recorded on a five-point scale (1 = “disagree,” 5 = “agree”).

### ***Feedback***

The students were asked to evaluate the feedback for developing their speaking skills through two items: “Feedback from other students,” “Feedback from the course instructor.” Responses ranged from 1 (“not helpful at all”) to 5 (“very helpful”). Additionally, students were asked to elaborate on their ratings (“Why?”).

### ***Technology***

Students evaluated the technology for developing their speaking skills: “Moodle,” as well as audio-sharing platforms: “SoundCloud” (PG) and “VoiceThread” (AG). Students responses were recorded on a scale ranging from 1 (“not helpful at all”) to 5 (“very helpful”) and students were also invited to elaborate on their responses (“Why?”).

The questionnaire was distributed in last class in both groups, students completed it anonymously.

### **Data Analysis**

In order to explore student perceptions of tools used in their speaking course, questionnaire data were subjected to qualitative and quantitative analyses. The open-ended responses from the questionnaire were analysed qualitatively for major themes. Content analysis involving the identification and analysis of the emerging themes within the dataset (Dörnyei, 2011) was adopted to capture students’ experiences with course tools. Student accounts were quantified; the digits provided in the text denote the number of students who reported aspects

within the given theme. We quote student words in an uncorrected form to illustrate points made. With regard to quantitative data analysis, we tallied means (responses ranging from 1 indicating a negative evaluation to 5 indicating a high evaluation) for each survey item and displayed the results to show average ratings in both groups. Given the qualitative nature of the approach adopted in the study (not allowing for the generalisation of the findings), we do not employ inferential statistical analyses and we do not report statistical significance of the results.

## Results

This section presents the results, that is, students' perceptions (PG—Polish group; AG—Australian group) of the tools designed and implemented in both courses in terms of (1) learning activities (i.e., reading to talk about current affairs, reading for summarising in class, podcasting/voice recording, learning and practising specific spoken genres), (2) learning resources (i.e., course materials made available on Moodle), (3) feedback (instructor- and peer-based), and (4) technology (Moodle and audio-sharing platforms).

### Learning Activities

#### *Reading to Talk about Current Affairs*

**PG.** Systematic reading and ensuing in-class conversations on the topics related to current affairs was seen, in students' declarations, advantageous for (1) practising speaking (8), (2) developing knowledge of the world (6), catering for the need of engaging in meaningful spoken interactions (4), developing other competences and attitudes (2) but it was also indicated that this activity can be challenging (5). First, as noted by one of the students, speaking practice is essential to improve speaking skills and one way of practising is to speak about current affairs. Another student emphasised the usefulness of this activity by having to put "different sets of difficult vocabulary" to use. Furthermore, talking about current affairs in English and exchanging opinions creates space that helps "speak more freely in English," allowing the students to produce long turns in speech: "If the topic was interesting I could elaborate on it even more than 5 minutes." Although one student confessed that "I just personally never felt it," they considered it "a great warm-up though." The next category of responses comprises an idea that by reading students have an opportunity

to become and/or remain knowledgeable of the world. This is considered to be important, as expressed by one of the students: "I gained huge knowledge about the world, and what was going on, I think it was my favourite part of the course." The next category contains comments indicating that reading about current affairs fosters students' need for and the ability to engage in spoken interaction. Specifically, student words suggest that engaging in spoken exchanges with peers was sought for: "There were very interesting opinions and topics so I wanted to add something from myself." Another student felt more competent with regard to communicating in speaking: "I know how to cooperate with the partner, in a proper and friendly way." As to other reported competences and attitudes, two students mentioned practising translation skills and assertiveness. According to one of them, "Current affairs that I read about were usually in Polish, so I had a chance to practise translating new information... to English in speech." Yet another student declared that while talking about current affairs, there were often conflicting opinions which helped him/her practice assertiveness in speech. The challenges emerging in students' comments include their struggles related to lack of interest (e.g., "When somebody isn't interested in politics, etc. reading these articles is painful," "I'm not interested in current affairs and it was hard for me to speak about something that I'm not interested in") and insufficient preparation (e.g., "It made me do research about current affairs although I have to confess that I wasn't always prepared," "I didn't like it. It was hard for me to choose what I should read about").

**AG.** The analysis of students' responses reveals three areas: (1) practising due to relevance and interest (7), (2) integration of and connection with the real world (4), and (3) enhancing motivation in learning (6). The freedom of choice of the topic of current affairs helped them participate in class discussions more actively. Most students stated that they enjoyed doing this activity because they could choose the topic they were interested in. Some students explained that the chosen topic was currently reported in news bulletins and newspapers so it was valuable for them to be able to engage in discussions with others outside the classroom (e.g., "I read a lot about corona virus and the conflicts in Hong Kong because I was interested in and people around me talked about them. I wanted to know [them] in English"). One student stated: "Although I often listened to some difficult words from TV or other people's talk, I hardly used them in a conversation. But now I managed to use them in class as well as outside." Another student wanted to have "more time to discuss the topic we brought and have a debate" and yet another one stated that "reading current affairs helped me a lot to learn new words."

### *Reading for Summarising in Class*

**PG.** The students endorsed this activity and they found reading and summarising articles beneficial for the development of their L2 speaking skills. They reported (1) enhanced spoken performance (8), (2) gains in the quality of L2 with regard to the range of vocabulary and accuracy (6), and (3) affective outcomes (6). The improvement of spoken performance is attributed to systematic training based on article content. Owing to reading, students reported an increase in the perceived ability to take longer turns (“I’ve learnt how to talk about something for a couple of minutes”) and to talk in an engaging way (“It’s difficult to present a topic to a partner in a way that will interest them and provoke a discussion and article summaries let me practice that”). One student stated that reading and then summarising article content supported their practice of discussion skills when they are forced to work with a partner who has “a totally different way of thinking and opinions” on the issues presented in the text. With regard to the comments on gains in the range of vocabulary and accuracy, the students explained that this is the result of the need to check unfamiliar words used in the texts. One student reported spending more time studying grammar (past tenses). The comments in the last category address emotions suggesting that reading to summarise articles engages students in a stimulating activity. The students reported “checking significant information,” “finding interesting information,” reading “interesting articles,” “broadening horizons” and “understanding more.”

**AG.** Similarly to the Polish group, the students in the Australian group reported: (1) improved English language skills (7), (2) acquired content knowledge (7), and (3) affective outcomes (5). By preparing this activity on weekly basis, the students made it a habit to read and speak. One student explained that “I prepared a note for a summary because [there were] some words I needed to remember when I shared my story to my classmates.” And “I looked up a dictionary many times while reading articles, which helps my vocabulary.” The student added that this activity was not only enhancing L2 skills but also content-related knowledge. They reported: “I learned a lot about medical terminology and medicine, especially side effects.” When they shared a summary successfully with their classmates, they seemed to feel confident (“Some story was difficult to summarise in English. But I did, which made me so happy”). Alternatively, due to lack of practice and preparation, they felt embarrassed. The student confessed: “I couldn’t remember how to pronounce some words and it was so difficult to memorise... I really wanted to stop summarising my article because I didn’t prepare it well.”

### ***Podcasting (Voice Recording) on Technology-related Topics***

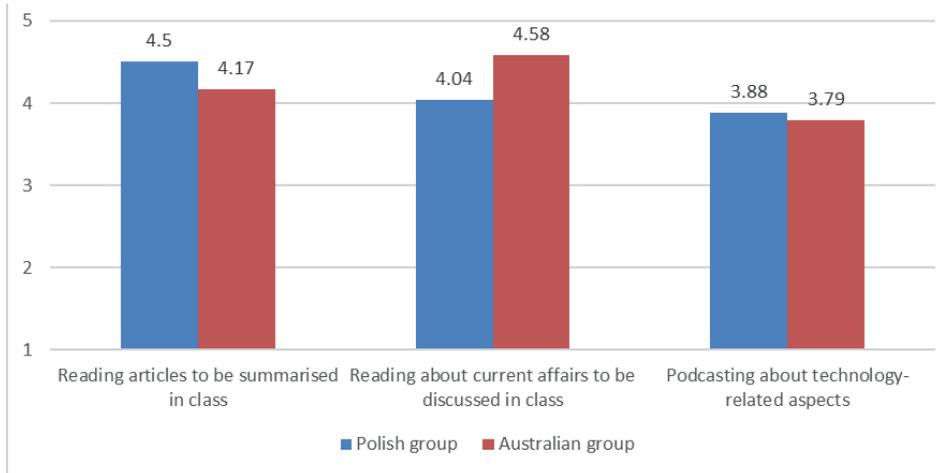
**PG.** Three categories of themes arise in students' responses: content-related (11), topic-related (6), and language-related (6). Content-related comments indicate that students gained and engaged with new knowledge—described as “current/important” by one of the study participants—because they had to do research in order to collect information prior to recording their talks. As reported, students learned, among others, about aspects of modern technology and how it can be used to improve their English. Furthermore, one student confessed that although they do not “like online activity (my own, I tend not to do it),” they found it “interesting to know that there are many things that can help me develop myself.” Topic-related comments revealed student interest in the area (e.g., “I am interested in that topic. It was really helpful to improve and gain a bit more to what I currently know”). Alternatively, some students acknowledged that the topics were interesting but difficult to talk about, and, despite gains in knowledge, the topics were not interesting or sufficiently diverse (e.g., “Not only technology-related topics are needed”). Finally, language-related comments concerned the perceived gains in the range of vocabulary and cohesion (e.g., “it develops also vocabulary and abilities of ‘common speech’ (links between paragraphs..., etc.)”). Voice recording itself helped students get accustomed to speaking and one study participant stated that it supported the development of their communication skills: “I learnt to use my voice as a tool of conveying the message.”

**AG.** The students considered this activity to be helpful in two areas: (1) content knowledge (12) and language (12). Most students felt that they gained knowledge (e.g., “I learned a lot. I made a note about information and my thoughts,” “Learned a lot. I didn’t even know, in my tongue”). Beyond this, they emphasised the improvement of language skills by practicing and the exposure in English (e.g., “improved speaking because I practiced a lot,” “I learned many new words because I had to read English texts”).

Overall, these activities (reading for talking about current affairs, reading for summarising in class, and podcasting—voice recording) were favourably evaluated by the students (Figure 1). PG students rated the helpfulness of reading articles to be summarised in class higher ( $M = 4.3$ ) than reading about current affairs ( $M = 4.04$ ) or podcasting ( $M = 3.88$ ). AG students gave reading about current affairs the highest rating ( $M = 4.58$ ), and also highly rated reading articles for summarising ( $M = 4.17$ , and podcasting ( $M = 3.79$ ).

**Figure 1**

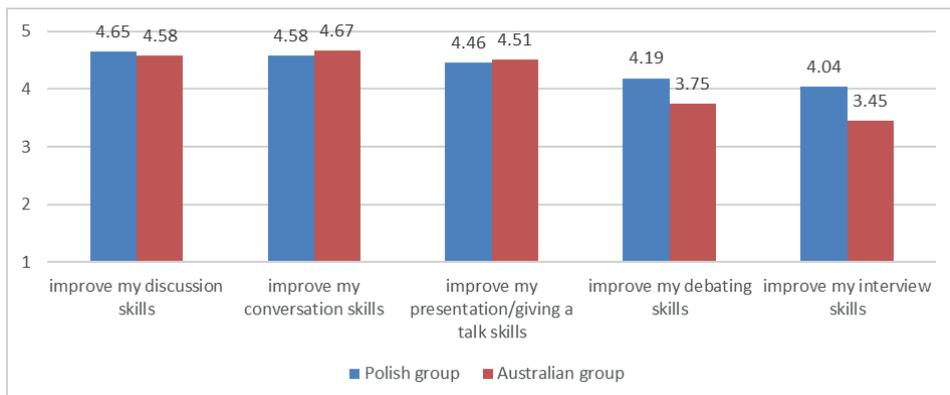
*How Helpful Were Homework Assignments for Developing Your Speaking Skills? Mean Evaluations; 1 = not helpful at all, 2 = rather not helpful, 3 = hard to say, 4 = quite helpful, 5 = very helpful.*



As displayed in Figure 2, in-class activities were reported to have helped the students develop speaking in given genres. AG students stated that course activities mostly helped them improve discussion (M = 4.58), conversation (M = 4.67) and presentation skills (M = 4.551). PG students also highly rated these aspects (M = 4.65, M = 4.58, M = 4.46, respectively). In PG students' opinion, in-class activities helped improve debating (M = 4.19) and interview skills (M = 4.04), while AG students gave these skills moderate ratings (M = 3.75, M = 3.45).

**Figure 2**

*What I Did in Class Helped Me... Mean evaluations; 1 = disagree, 2 = rather disagree, 3 = hard to say, 4 = rather agree, 5 = agree.*

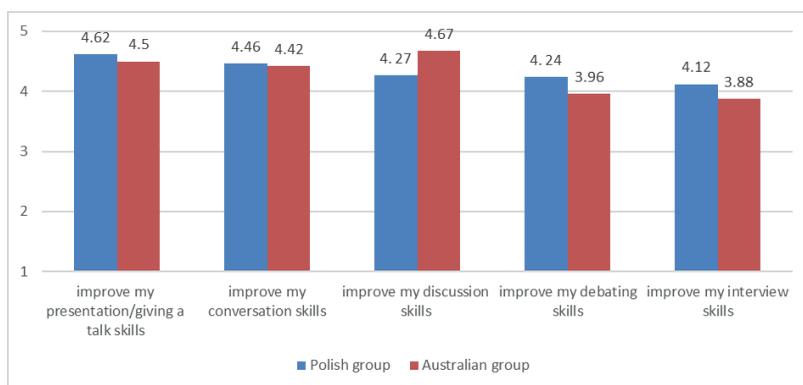


## Learning Resources

Available data show that the learning resources helped students enhance their speaking skills, as evidenced in the mean ratings presented in Figure 3 (no qualitative data available in the dataset). On average, in PG students' view, the resources helped them to improve, first and foremost, their presentation (M = 4.62) and conversation (M = 4.46) skills, the improvement in other skills being also highly rated (discussion skills M = 4.27; debating skills M = 4.24; interview skills M = 4.12). AG students declare that these resources helped them most to improve discussion skills (M = 4.67), while the improvement in other skills was rated slightly lower (interview skills M = 3.88; debating skills M = 3.96).

**Figure 3**

*Course Materials Provided on Moodle Helped Me... Mean evaluations; 1 = disagree, 2 = rather disagree, 3 = hard to say, 4 = rather agree, 5 = agree*



## Instructor and Peer-based Feedback

**PG.** With regard to feedback, students' comments focused on the quality and impact of the feedback received. As to the *feedback from the instructor*, the majority of the comments reflected on impact (16), seven comments concerned the quality and one student voices a limitation. Considering the impact, students' comments indicated that having received feedback from the instructor they better understood what their learning goals should be ("Specially I liked private emails which were very clear to understand and show me as a student what I needed to improve for the next time"). Moreover, instructor feedback was reported to have fostered L2 development, such as pronunciation and grammar, and helped notice weaknesses ("Instructor showed me my mistakes that I didn't know I've done; now I pay special attention to pronunciation"). Instructor feed-

back can also infuse students with a sense of reassurance (“I know whether my skills are good enough”) and boost motivation to work (“Getting each time a message from the teacher/expert, with a relevant, motivating comment,” “I wanted to be better and it was for me a great motivation to learn. I could see that I am not as bad as I thought”). The comments concerning the quality of instructor feedback highlighted the relevance of feedback, pointing out students’ strengths and weaknesses, the objectivity of feedback, its clarity, as well as feedback being “very helpful” and “professional.” One student felt that it was undeservedly positive: “The teacher wasn’t severe and rather moderate so feedback was very often better than I expected and deserve.” One student stated that there were “[t]oo many people on the course,” suggesting that more in-class feedback could have been provided, had there not been so many students in class. As to *peer feedback*, more comments referred to the quality of feedback (15) than to the impact it had (12). With regard to the quality, the students report both positive experiences and scepticism concerning the reliability of feedback. In many accounts, peer feedback was helpful (“Thanks to his or her opinion we could keep an eye on our mistakes”), immediate (“They told us what was wrong or fine immediately after listening so they had a ‘fresh’ overview and could be honest”), specific (“I know where and what mistakes I make,” “gave me concrete information”), as well as sincere, responsible, and trustworthy (e.g., “Fellow students are smart and tolerant. This equals to proper feedback”). In some students’ opinion, peer feedback was not useful when it was not sincere (“I wasn’t sure if the feedback was real [or] maybe my partner didn’t want to make me upset,” “Some people were just trying to be nice, not necessarily told you what they really thought about your speaking skills,” “I don’t think that my partner was 100% honest with me, she wanted to be nice, never said a bad word about my podcasts or other activities”). Concerning the impact of peer feedback, study participants reported its influence on L2 competences (pronunciation, noticing mistakes) and setting the goals for learning (“They told me what they liked and said what I should improve so I knew what to work on”); it also strengthened their efforts to improve own performance (“I could see what other people think about my speeches; different points of views and how could I did it in different or better way”). Although one student found peer feedback reassuring (“It is good to know what others think and have a constructive critic”), another one was disturbed (“It wasn’t appropriate to my skills. Always too low rating what demotivated me”).

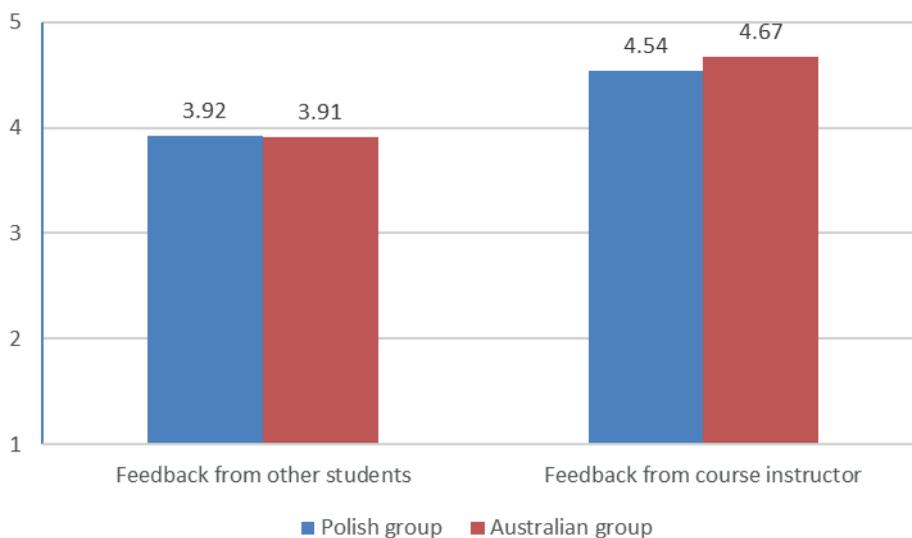
**AG.** The analysis of the data suggest that the students valued both the instructor and peer feedback. In *peer feedback*, they emphasise two areas; (1) learning (7) and (2) quality (4). The students noted that peer feedback was helpful because it supported their own learning (e.g., “I like peer feedback. The point they made was useful to correct my mistake”). However, a few students expressed

concern about the quality of feedback (e.g., “It was good to receive their comments but I was not so sure their comments were right because they were not experts”). Regarding *feedback from the instructor*, the students commented that the quality of feedback was beneficial in three areas: structure (7), language (8), content (5), and method (3). The students understood the difference of structural and functional aspects of a given spoken genre (e.g., “At the beginning, my talk was like daily conversations. Academic presentation has a structure and I learned how to organise my talk”). They also appreciated feedback on language (e.g., “She corrected my pronunciation and wrong words”), as well as content (e.g., “Sometimes I didn’t understand readings so her explanation helped me to understand”). Next, the students indicated that individual feedback was effective to help them understand their problems (e.g., “She gave me feedback in person and it was in detail about my work. So I could ask questions about her feedback and was able to understand my problems”). Overall, instructor feedback was perceived as being more helpful than peer feedback.

Overall, as can be seen from Figure 4, in both groups, feedback from the instructor was rated higher (PG M = 4.45; AG M = 4.67), compared to the feedback from peers (PG M = 3.92; AG M = 3.91).

**Figure 4**

*How Helpful Was Feedback for Developing Your Speaking Skills? Mean evaluations; 1 = not helpful at all, 2 = rather not helpful, 3 = hard to day, 4 = quite helpful, 5 = very helpful.*



## Technology (Moodle and Audio-sharing Platforms)

**PG.** While Moodle is considered a valuable platform containing information (14) that facilitates learning (10), SoundCloud is associated with novelty (6), enabling (13), emotions (3), and tensions (5). The students value Moodle for making the content available and for being a convenient and helpful hub of materials. The materials themselves are described as relevant, interesting, abundant, “clear and straightforward” information (links, tips, etc.) needed for preparing and following the course. Additionally, the resources are believed to foster learning appropriate vocabulary, for example: “Because of the materials posted there we could learn new vocabulary elements at home.” One student reported gaining more familiarity with target genres owing to Moodle-based materials and another one declares that these materials helped them memorise information: “I remember things better when someone comments a video material. When I read something I forget.” In students accounts, the platform, by making the resources available, facilitated their work out of class (e.g., “I downloaded the materials and checked them as often as I had a problem with something”). As to SoundCloud, its use for sharing digital voice recordings was novel for the students. They were not used to this kind of activity but they welcome the new opportunities that the tool affords, that is, being able to hear oneself speak, being “graded by a professional” or being more technology-literate. The tool is also regarded as an enabler, as reported by study participants. Students’ words suggest that it enabled noticing their L2, for example, “Especially when I had to check pronunciation of some words and now I pay attention to pronunciation and I remember my mistakes to this day,” “I started paying more attention to how I speak.” One student realised that their speaking skills were worse than previously imagined. The tool also supports improvements in the organisation of extended spoken utterances. Other participants focused on the opportunity to listen to other students’ podcasts as models to follow and to monitor own production by being able to hear themselves speak, “our voice, mistakes from the side.” Two students emphasised the feedback opportunities that the tool availed: “Feedback from podcasts helped me, I wanted to improve my skills and now I can see I am on a higher level. Podcasts were very good.” Two students also declared that the tool provided them with an audience, described as “theoretically wider” by one student or “limited” by another. Next, three students’ comments referred to the emotions that speaking entails. In students’ words, their experience with SoundCloud helped them reduce anxiety (“I’ve stopped being worried about my sounding and started to focus on content”) and was a source of satisfaction (“Being a little bit of a perfectionist myself I spend some time making sure the podcast is good. And it really turned out to be ☺”). As reported by one student, the experience with SoundCloud has increased their confidence as a speaker. Yet, a number of tensions emerge; two

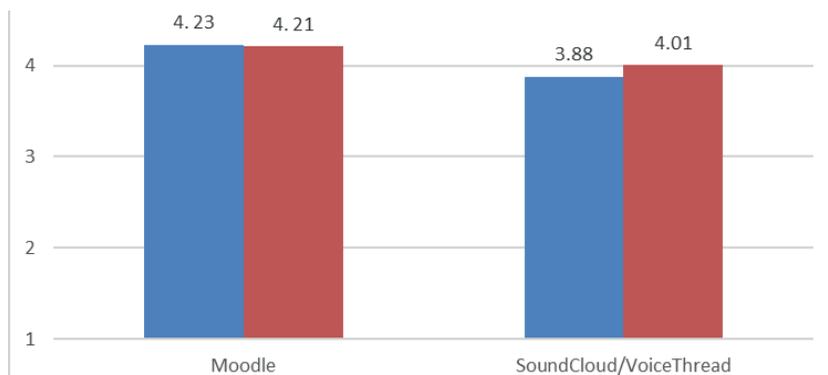
participants revealed concerns related to the way they recorded their podcasts, the usefulness of this activity versus their expectations. As one student stated, “I was reading what I earlier prepared, in the way as I always read so I don’t think it changed anything.” Another student notes that “It wasn’t the same as talking with other people live. I could prepare my presentation earlier. In real life I cannot make notes while talking with someone. That’s why talking in real life is stressful for me.” One student experienced a conflict of values: “I prefer to be honest and true, for me it was just pretending of being quite good at some topics.” Finally, one study participant declared that that they would rather speak more in class, simultaneously recognising that it is not possible because of the course length. One student admitted “combating with my obligations to make podcasts.”

**AG.** While reflecting on how Moodle supports their future study at university, the students feel that being familiar with Moodle will be very useful (e.g., “I learned how to use StudyDesk [that is part of Moodle]”) Recording activities gave the students mixed feeling and experience (e.g., “It was so hard to access VoiceThread by my mobile at the beginning. But it is good to learn how to record, and interesting to hear my voice after recording”).

Student evaluations of how helpful Moodle and audio-sharing platforms (SoundCloud—PG; VoiceThread—AG) were for developing L2 speaking skills are quite similar for both types of technological tools (Figure 5). PG students’ average rating of Moodle is  $M = 4.23$  and the audio-sharing platform is  $M = 3.88$ , whereas AG students’ ratings for Moodle is  $M = 4.21$  and the audio sharing platform is  $M = 4.01$ .

**Figure 5**

*Mean Evaluations of How Helpful Were the Following for Developing Your Speaking Skills? Mean evaluations; 1 = not helpful at all, 2 = rather not helpful, 3 = hard to say, 4 = quite helpful, 5 = very helpful*



## Discussion

The conceptualisation of tools for developing L2 speaking skills, as detailed in the theoretical part of this paper, served as a theoretical foundation to investigate tools for scaffolding skill development among EMHE students in two different contexts. A core premise underlying our approach is that tools mediate cognitive activity and, hence, have the potential to support linguistic development when tools are intentionally organised to scaffold learning (Vygotsky, 1978; Wood et al., 1976). As the concept of tools for developing L2 speaking skills remains under-researched, we need to advance our knowledge by articulating and integrating tools for scaffolding the learning process of diverse learners in modern classrooms. When students are supported in becoming familiar with the features of L2 they are expected to perform, see models of target L2 behaviour, practise the skill employing available tools as long and as much as needed, and when they receive feedback on performance, they are likely to speak with increasing fluency, confidence, and accuracy. The results of this exploratory study thus reflect on student perceptions of the scaffolding tools (i.e., activities, resources, feedback, and technology) that were used by the students in two EMHE contexts.

Considering the research question, the current study found preliminary evidence that, in students' view, the designed tools support the development of L2 speaking skills in both groups of learners (a homogenous group of non-native speakers of English set in Poland—a non-Anglophone country and a heterogeneous group of non-native speakers set in Australia—an Anglophone country) in a comparable fashion. Both in- and out-of-class *activities* are reported to facilitate the development of the genre-based speaking skills targeted in the course, that is, talks/presentations, debates, discussions, chats/conversations. Students' words suggest that, owing to systematic and frequent text production, they grow accustomed to speaking and, by having an opportunity to hear their own speech in voice recordings, they can evaluate their performance. Beyond that, data suggest that out-of-class activities allow students to prepare for speaking by acquiring and consolidating both content and language to be activated in oral text production. Yet, there are individual students who find some out-of-class activities limiting and/or uninteresting, as well as those who are doubtful of the sense of voice recording in the current shape, which makes it more difficult for them to engage in these learning activities. Next, the results of the study suggest that the *resources* applied in the course were believed to support the development of L2 speaking. Described as relevant, abundant, accessible, and easy to use, the resources seem to help students acquire L2 vocabulary and understand genre-based speaking. They also allow students to prepare for class, follow the course and can be referred to whenever reference is needed.

*Feedback* appears to be a valued tool, too. It becomes evident that feedback from the instructor contains information about the weaknesses or mistakes in produced texts, as well as hints concerning genre-based text organisation and target L2. Instructor-based feedback helps students envision and/or revise their learning goals and also provides some students with a sense of relief with regard to their capabilities as L2 speakers, as well as motivation for future work. Peer-based feedback, in turn, can be frequent, immediate, and can also be used to monitor own mistakes, as well as learning goals. However, both instructor and peer feedback is not always considered sincere or in agreement with expectations, which seems to breed conflict and tension on its reception. Finally, *technology* appears to support student learning throughout the course. Moodle grants continuous and unrestricted access to the learning activities and resources in class and referral to the resources out of class whenever students need information or examples to model their own speaking. Online sharing of voice recordings—in this study accomplished by the use of SoundCloud and VoiceThread applications—allows students to use other students' podcasts as examples of target text and to receive feedback from the instructor out of class.

On the whole, these results are consistent with prior research suggesting that scaffolding is beneficial for developing of L2 speaking through the use of learning activities and resources, feedback and technology (Ahmadpour et al., 2016; Azir, 2019; Gerakopoulou, 2016; Ghasedi et al., 2018; Gilead, 2018; Mirahmadi & Alavi, 2016; Nguyen, 2013; Shooshtari et al., 2018; Zarandi & Rahbar, 2016). This study further contributes to the field by advancing a wider use of different types of tools as scaffolds provided in multiple forms (Belland, 2017) to help students enhance their L2 speaking skills in the EMHE context. This study illustrates how tools were used to accommodate the features of scaffolding in tools to help students understand what they need to learn, receive information about their performance, draw on the available support or proceed without it when it is no longer needed, both in class and beyond classroom walls (Puntambekar & Hubscher, 2005). Besides, the results suggest that frequent and regular digital voice recording is particularly well-suited to enhance L2 speaking, which builds on the results obtained in prior research (Bui & Huang, 2018; De Jong & Perfetti, 2011; Qiu, 2019; Tecedor & Campos-Dintrans, 2019; Chang & Windeatt, 2021b) that emphasises the affordances of practice activities and technology to promote confidence while speaking. Through voice recording, students have a chance to structure, rehearse, and hear their own performance, thereby making the process of speaking “visible” (Goh, 2017, p. 248) and hence more manageable for L2 speakers. Also, the use of Moodle to create a flexible learning environment (Liu, 2011) is linked to the development of strategies for monitoring progress in learning progress.

The limitations of this study include, first and foremost, those that pertain to design-based and interventionist research conducted by practitioners in real

classrooms. The existing groups differ in terms of the number of participants and their social-material makeup, and the implementation of the tools in the classroom could have been influenced by the resourcefulness and energy of each instructor-researcher. Next, the students used a set of tools, which may or may not be the only set possible to optimally advance students' L2 speaking skills. Apart from that, our findings may be affected by the fact that researchers taught the participants and were also in charge of the design and implementation of the tools, which may question the credibility of the results. Acknowledging these limitations, the analysis of the dataset was conducted by both researchers aiming to provide thick description of the results. But even so, the findings in our exploratory study should be regarded in terms of preliminary insight that requires further empirical investigation, including other research designs and giving more prominence to quantitative data collection and more sophisticated analytical methods. On the other hand, for the same reason, that is, being practice-based, this study makes it possible to document and analyse the use of tools in real-world classrooms, thereby affording research insight not feasible otherwise and allowing, as Reimann (2011) notes, "teachers' pedagogical practices and students' learning practices... enter into decision making at all levels where educational decisions are made" (p. 43).

## Conclusion

Higher education students need environments that effectively support their L2 learning and use in academic settings. This study aimed to advance the area of L2 learning and teaching by conceptualising and analysing tools for scaffolding EMHE students' L2 speaking through the collaboration of researchers-practitioners in real-world classrooms in two educational contexts. This study illustrates how features of scaffolding were applied to map instructor, peer- and technology-based tools to include in- and out-of-classroom activities, resources, the learning management system (Moodle) and voice recording applications (SoundCloud, and VoiceThread) and peers' and instructors' feedback in L2 speaking courses. Students' accounts suggest that in- and out-of-class activities support the development of L2 speaking, in particular, by allowing the students to hear their own speech while practising. Peer and instructor feedback facilitated their speaking performance, just as the use of technology tools, that is, Moodle and voice recording applications. Overall, the results suggest that these tools can help cater to the multiple levels of student understanding of genre-based L2 speaking in diverse educational settings. Yet, it is necessary to acknowledge that, due to the study design, the findings must be treated with caution.

Despite this, we believe that the tools described in this article are an important first step towards designing instructional scaffolding in EMHE L2 speaking classrooms. Our study uncovered that there is room for further attempts to determine the adequacy of tools for scaffolding L2 speaking. For example, more research is imperative to inform the adaptation and use of the resources in speaking activities. There are also many unanswered questions related to the provision of feedback, that is, how to efficiently provide more of instructor-based feedback on L2 spoken performance to individual students in large classes or how to provide peer feedback of better quality. Finally, researchers can seek to find innovative ways of employing technology to assist L2 learners develop speaking skills for academic communication.

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### **Instrumente zur Förderung der Entwicklung von L2-Kommunikation in der englischsprachigen Hochschulbildung: Unterrichtserfahrungen aus Polen und Australien**

#### Zusammenfassung

Die Teilnahme an mündlicher L2-Kommunikation kann für Studierende an Hochschulen mit Englisch als Unterrichtssprache eine Herausforderung darstellen. Während die Literatur nahelegt, dass die Scaffolding-Methode die Entwicklung der L2-Kommunikation erleichtert, hat sich die Forschung bisher noch nicht mit dem Problem der Hilfsmittel für die Entwicklung des Scaffoldings befasst. Die vorliegende Studie verfolgt zwei Ziele: 1) zu untersuchen, wie das Scaffolding als Hilfsmittel zur Unterstützung der L2-Kommunikation eingesetzt werden kann, sowie 2) das Wahrnehmen der Hilfsmittel durch Studierende zu erfassen und zu analysieren. Sie stützt sich auf Daten, die auf der Grundlage von zwei Befragungen im Rahmen einer größeren designbasierten Forschung erhoben wurden, und zwar in Bezug auf zwei Gruppen: Anglistik-Studierende in Polen ( $N = 26$ ) sowie kulturell und sprachlich differenzierte L2-Lernende in Australien ( $N = 12$ ). Die Studie veranschaulicht, wie die Scaffolding-Methode verwendet wurde, um lehrer-, peer- bzw. technologiebasierte Hilfsmittel in Hinsicht auf Lernaktivitäten, Ressourcen, Technologie und Feedback auszuarbeiten. Die Ergebnisse deuten darauf hin, dass die Hilfsmittel auf verschiedene Ebenen von Verständnis und Fähigkeiten der Lernenden bezüglich der Entwicklung der L2-Kommunikation im modernen L2-Unterricht angewandt werden können.

*Schlüsselwörter:* Scaffolding, L2-Sprechen, Hochschulbildung, Polen, Australien





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## **The Relationship between Students' Motivation for Studying Business English and Their Knowledge of Business English and Its Terminology**

### **Abstract**

The study investigates the relationship between English Philology students' motivation for studying Business English and their actual knowledge of business terminology, some underlying economic concepts and basic rules of business correspondence. It is hypothesized that students who have higher motivation also possess more extensive knowledge of Business English, yet motivation alone is not enough but must be accompanied by a real effort put in studying the language. The study consisted of a test focusing on business terminology, the correction of errors in a business letter, and a test of selected economic concepts, followed by a questionnaire. As the results show, both the students' motivation and knowledge of Business English are varied. In particular, their knowledge varies between years of studies and areas of terminology or skills. In fact, some of the terms proved difficult even for relatively advanced students. Thus, even though motivation does play a role, its role does not seem to be decisive, as Business English is a complex field whose mastery requires extensive study and a lot of sustained effort. However, their awareness of their language needs is quite high, so they are likely to remain motivated and to attain a high level of competence in Business English.

*Keywords:* Business English, motivation, terminology, language needs

Undoubtedly, English is nowadays the global language as well as the language of international business. As Crystal (2003, p. 10) explains, the maintenance of the global status of a language requires economic power and, indeed, the driving force behind the dominance of English is economics. Thus, it goes without saying that people who want to work in business need to learn English, though not only general English, but also Business English with its terminology and rules of correspondence. As motivation constitutes an essential component of foreign language learning, which is a long and laborious process (Szalek,

2004, p. 22), it can be assumed that they are motivated to learn Business English, regardless of whether their motivation is purely instrumental, based on the desire to obtain, for example, a better-paid job, or integrative, involving willingness to communicate with native speakers and become a member of the English-speaking community (Gardner, 1985, as cited in Dörnyei, 1994, p. 274), or a combination of both. However, motivation alone does not yet guarantee foreign language learning success if it is not accompanied by a concrete learning effort. As Cherciov (2013) has shown for language maintenance in contexts conducive to attrition, a positive attitude and motivation cannot counterbalance attrition but require a language maintenance effort. By the same token, however essential motivation is for learning Business English, it can only help learners to focus on studying this area of English, but it cannot replace the necessary effort.

The purpose of the study is thus an investigation of English Philology students' motivation for learning Business English and of the relationship between that motivation and their actual learning results. More precisely, it is attempted to find out whether and to what extent the participants' knowledge of Business English depends on their motivation, or whether motivation is something they only declare, but their actual knowledge of Business English is independent of it. For example, a student might regard themselves as highly motivated, but not devote enough time and effort to the study of Business English. Therefore, attention is paid not only to the students' motivation, but also to their knowledge of Business English and of selected economic concepts.

As the participants are first- and second-year students, the knowledge of Business English tested here is still quite elementary and includes general business terms and the basic rules of business correspondence, and their motivation can be assumed to be based on a general interest in Business English, combined with plans regarding their future jobs, but it cannot yet be the same as the motivation of employees with specific language needs. In fact, as the present author has shown elsewhere (Włosowicz, 2018), sources of motivation for learning Business English are varied and complex, showing a mixture of instrumental motivation, integrative motivation and an interest in Business English, which does not depend on the year of studies or even the students' nationality (Polish and Czech in that case).

In general, research on the pedagogical aspects of Business English so far has focused mainly on teaching it, on the one hand, and on learners' needs on the other, taking into consideration the content of the course and the teacher's and the learners' linguistic competence and subject-matter knowledge (Donna, 2000; Dudley-Evans & St John, 1998; Hutchinson & Waters, 1987; Sing, 2017), but, arguably, little attention has been paid to the role of motivation in learning Business English. Certainly, the role of motivation has been extensively studied in the context of general language learning (e.g., Dörnyei, 1994; Dörnyei & Ushioda (eds.), 2009), but research on Business English tends to emphasize

learners' needs rather than their motivation. As will be discussed in more detail below, needs and motivation can be assumed to be related to each other, as people are generally motivated to meet their needs, whether physiological, emotional or related to knowledge and development (Szałek, 2004, pp. 8–10), but needs and motivation are not the same. Rather, the perception of needs might be regarded as a source of motivation to meet them, for example, by learning what is perceived as useful or likely to become useful. However, in the case of university students who do not work in business yet, needs related to Business English cannot be very specific, such as the need to master general business terminology and understand the underlying economic processes.

### **Business English as an Area of ESP**

Generally speaking, English for Specific Purposes (ESP) constitutes a field of research and teaching in its own right, ruled by a number of principles. It also imposes a number of requirements on the teacher and the content. In their definition of ESP, Dudley-Evans and St John (1998, pp. 4–5) enumerate several absolute and variable characteristics of the field. The absolute characteristics include focus on meeting the learner's specific needs and using the methodology and activities of the disciplines ESP serves; in fact, "the language (grammar, lexis, register), skills, discourse and genres" (Dudley-Evans & St John, 1998, p. 5) ESP focuses on are those which are required by those activities. On the other hand, the variable characteristics are as follows: "ESP may be related for or designed for specific disciplines" (Dudley-Evans & St John, 1998, p. 5), in some cases its teaching methodology may diverge from that of general English, it is most likely to be taught to adults (less frequently to secondary school students), and it "is generally designed for intermediate or advanced students" (Dudley-Evans & St John, 1998, p. 5), who possess at least basic knowledge of English, although it can also be taught to beginners.

At the same time, ESP constitutes a multi-disciplinary activity (Dudley-Evans & St John, 1998, p. 17) in which two kinds of content are used: carrier content and real content. The real content is the language being taught, for example, the language of process, presented to biologists in the context of a text about the life cycle of a plant, which, in turn, constitutes the carrier content (Dudley-Evans & St John, 1998, p. 11).

The ESP practitioner also has five different roles: a teacher, a "course designer and materials provider" (Dudley-Evans & St John, 1998, p. 13), a collaborator, a researcher, and an evaluator. However, in ESP, evaluators do not necessarily have to be teachers. As shown by Zhang (2013), the evaluation of

Business English students' skills may differ between evaluators. While academic teachers focus on language accuracy and the appropriate formats, business practitioners emphasize more practical criteria, such as power relationships, the corporate culture and time constraints (Puvanesvary, 2003, as cited in Zhang, 2013, p. 145). Similarly, the results of Zhang's (2013, p. 153) study confirm that students and professionals approach the business genres differently, which indicates a gap between the classroom and the professional context. As Zhang (2013, p. 154) concludes, "business genres need to be taught in a holistic way," taking into consideration "the goal of the activity" (Zhang, 2013, p. 154).

Moreover, it has often been emphasized that teaching English for Specific Purposes (ESP), including Business English, is closely connected with needs analysis and the effort to meet learners' language needs (Dudley-Evans & St John, 1998; Hutchinson & Waters, 1987; Sing, 2017). As Vandermeeren (2005, p. 176) concludes, before putting learners in contact with a foreign language and culture, "the teachers must know which business-related skills and knowledge their learners need." According to Hutchinson and Waters (1987, p. 53, their emphasis), the main difference between ESP and General English "is not the *existence* of a need as such, but rather an *awareness* of the need." Hutchinson and Waters (1987, p. 54) distinguish between target needs, or "what the learner needs to do in the target situation," and learning needs, or "what the learner needs to do in order to learn." Target needs include necessities (knowledge and skills necessary for the learner to function in the target situation), lacks (which of the necessities they have not mastered yet), and wants, or needs perceived by the learner, which may differ from those perceived by the teacher or another person involved, such as the learner's superior. For example, a salesman may speak English fluently but incorrectly. He may regard his English as sufficient and feel no motivation to improve it, though his employer may think he ought to improve his grammatical accuracy in order not to taint the company's image (Hutchinson & Waters, 1987, p. 57). On the other hand, knowing the target situation is not a sufficient indicator of learning needs. In fact, as Hutchinson and Waters (1987, p. 62) put it, "learners may be well motivated in the subject lesson or in their work, but totally turned off by encountering the same material in an ESP classroom." Thus, learning needs analysis should take into consideration such factors as the learners, their background, the reasons for taking the course, the available resources, etc. (pp. 62–63).

However, as Sing (2017, p. 337) has remarked, traditional needs analysis has been challenged by new approaches to learning and teaching. For example, "[f]alking of contradictory needs, the gulf between target genres in education and those in the workplace continues to be a vexing issue" (Sing, 2017, p. 337). For example, Lung (2014, p. 267, as cited in Sing, 2017, p. 337) proposes a "blended needs analysis," which combines three perspectives: the individual, the institutional and the societal one, and involves a shift "from a predomi-

nantly language- and genre-based target-situation analysis towards the inclusion of community-based practice and the attainment of institutional goals” (Sing, 2017, p. 337). This confirms Zhang’s (2013, pp. 153–154) observation that there is a discrepancy between the teaching of Business English and its actual use, and that teaching should be more holistic and should take into consideration the corporate culture, the target situation, etc.

Still, it must be remembered that the needs of actual business people, company employees, etc., who work in a particular branch of industry or commerce, who have business partners in particular foreign countries and perform a particular role in the company, have much more specific language needs than university students do, who may not know yet where they will work in the future. Thus, while meeting their language needs can be regarded as motivating, it must be remembered that, at that stage, their beliefs about Business English in use and thus their perceived language needs may not be fully accurate and it is rather the teacher who is likely to know what knowledge and skills they may need in the future. Similarly, as it is still impossible to know the target situations in which they will find themselves in the future, they should be taught more general Business English, and be prepared for lifelong learning.

## **Language Needs and Motivation**

By and large, it can be assumed that learners who are motivated to study a foreign language perceive some learning needs. Such needs may be connected, on the one hand, with short-term learning goals, especially ones related to instrumental motivation (cf. Gardner, 1985, as cited in Dörnyei, 1994, p. 274), such as passing a test and obtaining a good grade, and to long-term goals, which may involve either instrumental motivation (e.g., obtaining a good job in the future) or integrative motivation (communicating with native speakers, exploring the target language culture, travelling and becoming a member of the English-speaking community, etc.).

Indeed, motivation can be of many different types and can have different sources. One of the most frequently cited divisions is the one introduced by Gardner (1985, as cited in Dörnyei, 1994, p. 274), into integrative and instrumental motivation. However, as Gardner and McIntyre (1993, p. 4) admit, this division is “too static and restricted” because, in fact, motivation is dynamic and involves a complex set of factors. At the same time, both types of motivation can be conducive to learning. As shown by a number of studies (Dörnyei, 1990; Lukman, 1972; Gardner & McIntyre, 1991, as cited in Gardner & McIntyre, 1993, p. 4), “achievement in a second language is facilitated by

instrumental orientation (or motivation) as well as integrative motivation and attitudes” (Gardner & McIntyre, 1993, p. 4).

Another division, proposed by Deci and Ryan (1985, as cited in Dörnyei, 1994, pp. 275–276), distinguishes between intrinsic and extrinsic motivation. While intrinsic motivation is based on learners’ natural curiosity and interest, extrinsic motivation involves expecting an external reward or avoiding punishment. However, as Dörnyei (1994, p. 276, his emphasis) remarks, “under certain circumstances—if they are sufficiently *self-determined* and *internalized*—extrinsic rewards can be combined with, or even lead to, intrinsic motivation.”

Still, according to Dörnyei (2009, p. 10), the term “integrative” does not apply to many learning environments and, simultaneously, it is ambiguous, as it is often difficult to determine “what the target of the integration is” (Dörnyei, 2009, p. 23). Instead, Dörnyei (2005, as cited in Dörnyei, 2009, p. 29) has proposed “The L2 Motivational Self System,” which comprises three components: The Ideal L2 Self, the Ought-to L2 Self, and the L2 Learning Experience. If we imagine our ideal self as fluent in the foreign language, we are more likely to be motivated “to reduce the discrepancy between our actual and ideal selves” (Dörnyei, 2009, p. 29). According to Dörnyei (2009, p. 29), the Ideal L2 Self encompasses “traditional integrative and internalized instrumental motives.” By contrast, the Ought-to L2 Self relates to “the attributes that one believes one *ought to* possess to meet expectations and to *avoid* possible negative outcomes” (Dörnyei, 2009, p. 29, his emphasis). Finally, L2 Learning Experience is related to “executive” motives which apply to the learning environment and functions at a different level, as a bottom-up process.

As mentioned by the present author elsewhere (Włosowicz, 2018, p. 109), in the context of Business English it would also be difficult to talk about integrative motivation, unless one meant becoming a member of the international business community. However, the ideal L2 self can play an important role here. Imagining one’s ideal self as being able to use Business English correctly in all situations can be a significant motivating factor, which has been confirmed by the present author (Włosowicz, 2018, p. 111). Indeed, as students who still lack experience with Business English in a work environment, they are motivated by imagining their ideal selves.

Moreover, as mentioned above, motivation is dynamic (Gardner & McIntyre, 1993), so it can be assumed to change with time. It may be hypothesised that if students’ learning needs are met, they are more likely to feel that they are engaged in a meaningful activity, which, in turn, can motivate them further (cf. Włosowicz, 2016, p. 281). According to the PERMA model (Seligman, 2011, as cited in McIntyre & Mercer, 2014, p. 154), the dimensions of a good life—and, arguably, also of successful learning—include:

a focus on positive emotion (P), engagement with activities that use one's character strengths I, developing positive interpersonal relationships I, finding meaning by serving a cause beyond oneself (M), and recognizing areas of accomplishment and achievement (A). (McIntyre & Mercer, 2014, p. 154)

Applying these dimensions to the learning of Business English, it might be assumed that students are likely to feel motivated if they focus on the positive emotions of doing what really interests them and what they find meaningful, if they observe progress in their Business English skills, and if their relationships with one another and the teacher are positive. As for the character strengths, they can be supposed to be comparable for Business English and for foreign language learning in general, though students choosing to specialize in Business English might be supposed to possess some interpersonal skills useful in business.

## The Study

### Participants

The present study was carried out with forty-four English Philology students specializing in Business English at the University of Silesia in Katowice (Faculty of Humanities in Sosnowiec), twenty of whom were first-year students and twenty-four were second-year ones. Thirty-three of them were female (fifteen in the first year and eighteen in the second year), five were male (three in the first year and two in the second year), and six did not indicate their gender (two in the first year and four in the second). Their native language (L1) was Polish, except for one person who indicated Ukrainian, and three participants did not provide any information about their language repertoires. Though no placement test was administrated, they could be assumed to be advanced in L2 English (B2/C1) and they were studying to develop their English language competence with a focus on Business English. Forty of them had German as L3, one had French as L3, and three mentioned Spanish as L4 and one—French as L4. It may thus be supposed that, as multilingual learners, they possessed considerable language awareness and were also aware of their language needs and motivation sources.

For the purposes of the study, each group (i.e., the first and the second year) was divided into a high-motivation and a medium-motivation group on the basis of the overall motivation levels (Question 2: How strong is your overall

motivation for studying Business English?) indicated in the questionnaire (see Appendix 2). It was assumed that 1 or 2 on the 1 to 5 Likert scale corresponded to low motivation, 3—to medium motivation (one student marked 3.5, which was not included in the scale, but his motivation was also classified as medium), and 4 or 5—to high motivation. In fact, nobody marked 1 or 2, so none of the students had low motivation for studying Business English.

Hence, seventeen students in the first year had high motivation and three had medium motivation. In the second year, fourteen students had high motivation and ten students had medium motivation, which might suggest some disappointment with the Business English specialization or a change in priorities. In order to check whether the difference between the first and the second years was statistically significant, a chi-square test was performed. However, the difference was not significant at  $p = 0.0535$  ( $df = 1$ ), which indicates that, although some of the second-year students might have lost their motivation for studying Business English, it cannot be said that the second year's motivation is significantly lower.

## Method

The study consisted of two parts: a Business English test and a questionnaire concerning the students' motivation for studying Business English, the reasons for studying it, their motivation for studying business vocabulary and business correspondence, and acquiring background economic knowledge, as well as the test they had just taken. The components of the test were: a multiple-choice terminology test, a gap-filling task, the correction of errors in an enquiry about a product, and a multiple-choice test of economic and business knowledge. The test is presented in Appendix 1 and the questionnaire in Appendix 2 at the end of the article.

The Business English test was based on such textbooks as Mascull (2010), Sweeney (2002), Ashley (2003), and Jendrych and Wiśniewska (2012), complemented with the author's general knowledge of business and its terminology. Though most of the terms were supposed to be already known to the participants, some of them could be more difficult, but it was assumed that more strongly motivated students could study Business English on their own and thus their knowledge could go beyond the classes at university.

The research questions were as follows: First, what do the results reveal about the participants' knowledge of Business English as well as about their general knowledge of economics? Second, do the students' results depend on their motivation for studying Business English?

## Results

First, the results of the multiple-choice terminology test varied across years and motivation levels, but it can also be observed that some items posed the participants more difficulty than the others. In each item, only one answer was correct (Corr), the other three were incorrect (Inc) and the lack of an answer was classified as avoidance (Av). The results (both numbers and percentages) are presented for all four groups, 1M (first year, medium motivation), 1H (first year, high motivation), 2M (second year, medium motivation) and 2H (second year, high motivation), in Table 1 below.

**Table 1**  
*The Results of the Multiple-choice Terminology Test*

Item	First year						Second year						
	Medium (1M)			High (1H)			Medium (2M)			High (2H)			
	Corr N %	Inc N %	Av N %										
1	2 66.7	1 33.3		8 47.06	9 52.94		10 100				11 78.57	3 21.43	
2	1 33.3	2 66.7		2 11.76	15 88.24		6 60	4 40			8 57.14	6 42.86	
3	2 66.7	1 33.3		14 82.35	2 11.77	1 5.88	7 70	3 30			13 92.86	1 7.14	
4	3 100			16 94.12	1 5.88		9 90	1 10			12 85.71	2 14.29	
5	3 100			15 88.24	2 11.77		9 90	1 10			13 92.86	1 7.14	
6		3 100		5 29.41	12 70.59		5 50	5 50			2 14.29	10 71.43	2 14.29
7	1 33.3	2 66.7		5 29.41	11 64.71	1 5.88	4 40	6 60			5 35.71	9 64.29	
8	1 33.3	2 66.7		13 76.47	4 23.53		10 100				12 85.71	2 14.29	
9	1 33.3	2 66.7		11 64.71	6 35.29		6 60	4 40			10 71.43	3 21.43	1 7.14
10	3 100			10 58.82	4 23.53	3 17.65	9 90	1 10			13 92.86	1 7.14	
Total	17 56.7	13 43.3	0	99 58.24	66 38.82	5 2.94	75 75	25 25	0		99 70.72	38 27.14	3 2.14

In general, there were more correct answers than incorrect ones in all four groups, which indicates that the students were relatively familiar with the vocabulary. Apparently, the most difficult items were 2, 6, and 7, as they had

the highest percentages of incorrect answers. In 2, not only did the participants confuse shareholders with stakeholders, but they also accepted the irrelevant answers “involves” (invented by the author) and “companions.” The correct answer was “stakeholders,” but it is possible that they had encountered the term “shareholders” more often (in fact, shareholders are also stakeholders, but not all stakeholders are shareholders) and formal similarity influenced their choices as well. In 6, the target answer was “telecommuting,” a word not all of them probably knew. In 7, a market where the supply is greater than the demand is a buyer’s market, because buyers can choose and may buy from the competition, and also prices are low. This could not so easily be guessed if one did not know the term, as the opposite also seemed logical (a seller’s market as a market filled with goods by sellers). By contrast, the easiest items were 3, 4, 5, 8, 9, and 10 for both years, and 1 for the second year (the first year might not have studied it yet, but the percentages of correct answers indicate that some of them had already encountered the term “brand loyalty” or guessed it). “Merger” (5) was certainly known to them, and so were probably such terms as “flexitime” (3), “a trade surplus” (4), “perishables” (8) and “outsourcing” (9), or they were easy to guess. Finally, 10 (the amount of money spent on advertising not being a key indicator of the state of a country’s economy) could be supposed to be logical enough to infer.

The results of the first and the second years were then compared by means of a chi-square test in order to check whether their correctness depended on the year of studies.

As  $p < 0.01$  ( $p = 0.004$ ,  $df = 2$ ), it can be concluded that the difference between the first and the second years was statistically significant. However, comparing all four groups (the high and medium motivation groups in the first and in the second year, the difference was no longer statistically significant ( $p = 0.036$ ,  $df = 6$ ). It can be concluded that the role of motivation is not so straightforward: on the one hand, highly motivated first-year students could do as well as or even better than second-year students. On the other hand, the existence of high scores (even 100% for items 1 and 8 in the 2M group) in the medium motivation groups suggests that moderately motivated students could also possess extensive knowledge of Business English.

The second part, the gap-filling task, consisted of ten sentences, which required filling in the gaps with one word (for example, “accountant” to complete the expression “chief accountant”) or with a whole expression (for example, “strengths, weaknesses, opportunities, threats” for the acronym SWOT). Therefore, the answers were divided into four categories: correct (fully correct, possibly with a small spelling mistake which still showed that the student knew the target term), partly correct (only a part of the expression or one element of a pair was given correctly, for example, the student provided the target expression, “indirect taxes,” but in the same sentence they wrote “income taxes”

instead of “direct taxes”), incorrect (the wrong term or a non-existent one), and avoidance, which meant leaving a gap. The results of the gap-filling task are presented in Tables 2 and 3, for the first and the second year respectively.

**Table 2**

*Results of the Gap-filling Task (First Year): Numbers and Percentages*

Item	Medium (1M)				High (1H)			
	Correct	Partly correct	Incorrect	Avoidance	Correct	Partly correct	Incorrect	Avoidance
	N %	N %	N %	N %	N %	N %	N %	N %
1	2 66.7	1 33.3			8 47.06	4 23.53	1 5.88	4 23.53
2	3 100				15 88.24		1 5.88	1 5.88
3	1 33.3		2 66.7		5 29.41	3 17.65	3 17.65	6 35.29
4	3 100				17 100			
5	2 66.7			1 33.3	8 47.06		1 5.88	8 47.06
6		1 33.3	1 33.3	1 33.3			5 29.41	12
7				3 100			1 5.88	16
8	1 33.3			2 66.7	5 29.41			12 70.59
9	1 33.3			2 66.7	7 41.18	1 5.88	4 23.53	5 29.41
10			1 33.3	2 66.7	4 23.53		2 11.76	11 64.71
Total	13 43.33	2 6.67	4 13.33	11 36.67	69 40.59	8 4.71	18 10.59	75 44.11

**Table 3**  
*Results of the Gap-filling Task (Second Year)*

Item	Medium (2M)				High (2H)			
	Correct	Partly correct	Incorrect	Avoidance	Correct	Partly correct	Incorrect	Avoidance
	N %	N %	N %	N %	N %	N %	N %	N %
1	9 90	1 10			14 100			
2			10 100		3 21.43	4 28.57	3 21.43	4 28.57
3	8 80	1 10		1 10	11 78.57	2 14.29	1 7.14	
4	8 80			2 20	13 92.86			1 7.14
5	4 40		1 10	5 50	4 28.57			10 71.43
6	3 30			7 70	2 14.29			12 85.71
7			3 30	7 70	1 7.14			13 92.86
8			1 10	9 90	2 14.29		1 7.14	11 78.57
9	5 50	1 10	3 30	1 10	7 50	1 7.14	2 14.29	4 28.57
10	2 20		7 70	1 10			9 64.29	5 35.71
Total	39 39	3 3	25 25	33 33	57 40.71	7 5	16 11.43	60 42.86

As can be seen above, here the results are more varied, as retrieving business terminology from memory was more difficult than choosing the correct answers from the available ones. Therefore, a high percentage of avoidance (possibly, due to the inability to retrieve the terms) can be observed in all four groups. It might seem surprising that the avoidance rates are higher in the high motivation groups than in the medium motivation ones, but a possible explanation is that highly motivated students preferred leaving a gap to making a mistake; indeed, the percentages of incorrect answers are higher in the medium motivation groups. Surprisingly enough, the percentages of correct answers in the high and medium motivation groups are comparable; in the second year the high motivation group provided slightly more correct answers (40.71%) than the medium motivation one (39%), but in the first year it is the opposite (43.33% correct answers in the medium motivation group and 40.59% in the high motivation group). It is possible that the medium motivation groups

were more inclined to take risks, that is why they wrote what seemed correct to them, and in some cases it proved correct.

The results were compared by means of a chi-square test to find out whether the correctness of the answers depended, first, on the year of studies and, second, on both the year of studies and motivation. In the former case, the difference between the first and the second years was not statistically significant at  $p = 0.3211$  ( $df = 3$ ). In the latter case, the difference between the four groups 1M, 1H, 2M, and 2H was not statistically significant either at  $p = 0.1336$  ( $df = 9$ ). Thus, the students' performance on the gap-filling task did not depend on the year of studies, nor on their motivation.

The most correct answers were given in sentences 1 and 4, and the most avoidance (or ignorance of the target terms) was observed in sentences 6, 7, 8, and 10. Undoubtedly, the acronyms SWOT (1) and ASAP (4) were familiar to the students, the latter probably not only from Business English classes. By contrast, the expressions "hands-on experience" (6), and "chief accountant" (10), as well as the acronym AGM (8), were much more difficult to retrieve or even unknown to some students. However, "the glass ceiling" (7) might have been familiar to them from the press, etc., not necessarily from Business English classes, but it proved not to be the case. Table 4 shows examples of the students' errors.

**Table 4**  
*Examples of Errors in the Gap-filling Task*

Example	Group	Student's response (in the sentence context)
1	2H	The acronym USP stands for <i>Unique Selling Product</i> .
2	2M	The set of stereotypes, prejudices, etc. which prevent women from reaching senior executive positions is referred to as the <i>head</i> ceiling.
3	2M	The person responsible for preparing a company's balance sheets is its chief <i>executive</i> .
4	1M	Contact with customers gives salespeople <i>work-on</i> experience.
5	1H	This car is more <i>economic</i> than the other because it uses less petrol.
6	2M	<i>Visible</i> taxes are paid on one's income, while <i>hidden</i> taxes are paid when one buys some products and the tax is included in the price of the products (e.g. VAT).
7	2M	<i>Income</i> taxes are paid on one's income, while _____ taxes are paid when one buys some products and the tax is included in the price of the products (e.g. VAT).

As the examples show, the participants' attempts to fill in the gaps often reflected reliance on words which seemed to fit in the contexts (e.g., "work-on experience," instead of "hands-on experience," "Unique Selling Product" for

“Unique Selling Point/Proposition”), or expressions which sounded familiar but did not fit in the context (e.g., “chief executive” for “chief accountant”). In Example 5, the error comes from the confusion of the adjectives “economical” and “economic.” In Example 6, the answer was plausible, but the target terms were “direct taxes” and “indirect taxes.”

As for the background knowledge of economics, again, a multiple-choice test was administered, so the possible response categories were “correct,” “incorrect” and “avoidance.”

**Table 5**

*The Results of the Test of Economic Knowledge (Numbers and Percentages)*

Item	First year						Second year					
	Medium (1M)			High (1H)			Medium (2M)			High (2H)		
	Corr. N %	Inc. N %	Av. N %									
1		2 66.7	1 33.3	4 23.53	12 70.59	1 5.88	8 80		2 20	14 100		
2	2 66.7		1 33.3	13 76.47	3 17.65	1 5.88	6 60	2 20	2 20	13 92.86	1 7.14	
3	2 66.7		1 33.3	16 94.12	1 5.88		8 80		2 20	13 92.86	1 7.14	
4	2 66.7		1 33.3	11 64.71	6 35.29		3 30	5 50	2 20	3 21.43	10 71.43	1 7.14
5		2 66.7	1 33.3	7 41.18	7 41.18	3 17.65	1 10	6 60	3 30		11 78.57	3 21.43
Total	6 40	4 26.67	5 33.33	51 60	29 34.12	5 5.88	26 52	13 26	11 22	43 61.43	23 32.86	4 5.71

Thus, it can be seen that the highest percentages of correct answers (100%, 94.12% and 92.86%) were provided by the high motivation groups, however, this also depended on the question, as in response to question 5, 78.57% of the second-year high motivation group gave incorrect answers and none gave a correct one. Similarly, in the second-year medium motivation group, there were more incorrect (60%) than correct (10%) answers to question 5. By contrast, there were equal numbers of correct and incorrect answers (seven students, i.e., 41.18%) in the first-year high motivation group. Either they were better at guessing, or they had just learnt the difference between Theory X and Theory Y, while the second-year students might not have learnt it—possibly, with another

teacher—or might have forgotten it. On the other hand, in question 1 (about the four P's and the additional three P's) the second-year students did visibly better, and in question 3 (about a mixed economy), all four groups provided many more correct answers than incorrect ones. This suggests that those questions were based on material they had mastered well.

A chi-square test was carried out to compare the first and the second year. At  $p = 0.795$  ( $df = 2$ ) the difference was not statistically significant at all. However, if all four groups were compared, the difference was statistically significant ( $p = 0.00695$ ,  $df = 6$ , so it was significant at  $p < 0.01$ ), which suggests that the results depended both on motivation and on the year of studies.

Moreover, the students' performance on the error correction task was analyzed. However, as the responses could vary—which was mentioned above (Zhang, 2013)—the evaluation of business correspondence can depend on who evaluates it and what the purpose of the letter is—the analysis was qualitative. Generally, the students noticed that the letter was badly written; as one person remarked, it was slightly chaotic. As for the layout, they noticed that the letter should be divided into paragraphs, two students noticed that the address should be before the date, and some wanted to change the address from “April 21, 2017” to “21 April 2017” and the address from “25, Fox Street” to “Fox Street 25” (in fact, both formats are possible). Some students also tried to make the letter more polite, for example, by adding “or Madam” (there was only “Dear Sir”), “I look forward to hearing from you,” or changing “I want” to “I would like,” or “Best regards” to “Yours faithfully.” Three first-year students insisted that the sender should have indicated his position in the company. In fact, he might have been an individual customer, so his position in the company would have been irrelevant. It is possible that the first year had studied a lot of examples of business letters with the sender's position in the company, which affected their decisions. However, not all corrections were accurate, for example, changing “Best regards” to “Kind regards,” which did not increase the level of politeness.

Finally, it is worth analyzing the participants' motivation for studying Business English in general, as well as different components of Business English knowledge. The students' mean overall motivation in all four groups was  $M = 3.8488$  ( $SD = 0.6412$ ), so it was fairly high and relatively similar among the students. In the 1M group the mean was 3 ( $SD = 0$ ), as they had all indicated 3, in 1H  $M = 4.235$  ( $SD = 0.437$ ), in 2M  $M = 3.05$  ( $SD = 0.158$ ), and in 2H  $M = 4.1538$  ( $SD = 0.376$ ). This indicates that the groups were fairly consistent in their motivation, that is, that there were not big differences within the groups.

However, the participants' levels of motivation for learning particular components of Business English competence were more varied. Mean motivation for learning business terminology varied from 3 ( $SD = 0$ ) in the 1M group,

thorough  $M = 3.4$  ( $SD = 0.699$ ) in 2M,  $M = 4$  ( $SD = 0.612$ ) in 1H and  $M = 4.1429$  ( $SD = 0.5345$ ) in 2H, which indicates that the second-year students were more motivated than their first-year counterparts; probably, they understood how important terminology was. Still, mean motivation for studying business terminology calculated for all four groups remained relatively high (3.8409,  $SD = 0.68$ ). On the other hand, motivation for learning business correspondence was already lower:  $M = 3.5116$  ( $SD = 1.055$ ) for all four groups together,  $M = 2.667$  ( $SD = 1.1547$ ) for 1M,  $M = 3.5294$  ( $SD = 0.7998$ ) for 1H, 3 ( $SD = 1.15$ ) for 2M and  $M = 4$  ( $SD = 0.7845$ ) for 2H, which suggests that those second-year students who were highly motivated for studying Business English also understood the importance of correspondence skills. Motivation for learning economics to understand the underlying concepts was slightly higher for all four groups together ( $M = 3.727$ ,  $SD = 0.924$ ), but also more varied: from  $M = 2$  ( $SD = 0$ ) in 1M, through  $M = 3.1$  ( $SD = 0.738$ ) in 2M,  $M = 4.0588$  ( $SD = 0.748$ ) in 1H, and  $M = 4.1429$  ( $SD = 0.663$ ) in 2H. Thus, while the less motivated students in the first-year may have regarded economics as irrelevant to Business English, the more motivated ones in both years understood its importance, and even the less motivated second-year students were already more willing to learn it. However, although the mean motivation for acquiring background economic knowledge in the 2H group was the same as that for learning terminology, in the former case it varied more from one student to another.

Last but not least, the students' perception of the difficulty of the tasks was analyzed: the mean difficulty analyzed for all four groups was medium:  $M = 3.4886$  ( $SD = 0.774$ ), but it varied among the groups. Thus, the mean difficulty level was 4 ( $SD = 1$ ) in 1M, 3.47 ( $SD = 0.7174$ ) in 1H, 3.75 ( $SD = 0.9789$ ) in 2M and 3.2143 ( $SD = 0.579$ ) in 2H, which shows that the less motivated students found the tasks more difficult than the more motivated ones. This is not surprising, as the less motivated ones can be assumed to have possessed less knowledge of Business English.

## Conclusions

In general, the results show a certain relationship between motivation and the students' performance on the tasks as well as their perception of the tasks' difficulty. However, the relationship is not as straightforward as it might be expected.

To answer the research questions, first, the participants' knowledge of Business English is relatively good (taking into consideration the time of

studying the field), but also considerably varied. Certainly, some of the terminology and concepts were better-known to them than others, which can be explained by the fact that they were still in the process of learning Business English. Still, some of the general knowledge items could be assumed to be known from the press, the Internet or other media, not necessarily from the Business English course at university. For example, in the economic knowledge task, items 2 (about the benefits of international trade) and 3 (about a mixed economy), which seemed quite logical if one had enough general knowledge, proved fairly easy for all groups. Still, it can be supposed that the highly motivated students read more about economics (for example, press articles) in their free time too, because they were interested in it. Judging by the numbers of correct and incorrect answers, predictably enough, the multiple-choice tasks proved to be easier than the gap-filling task, as recalling partial knowledge or even choosing the most plausible answer using logical thinking was easier than retrieving terms from memory.

Second, motivation certainly plays a role in the learning of Business English, but the relationship between the students' motivation and performance is quite complex. On the one hand, the highly motivated students often provided more correct answers than those with medium motivation, but that was not always the case. In fact, even highly motivated students had difficulty with some terms as well as with economic background knowledge. It is possible that they had not studied them yet or that they had not acquired them well enough. As the chi-square tests show, the differences between the first and the second year were significant at  $p < 0.01$  in the terminology task, but not in the gap-filling task and the one concerning economic knowledge. By contrast, the differences between all four groups, taking into consideration both the year of studies and motivation, were significant at  $p < 0.01$  for the economic knowledge task, but not terminology, either in the multiple-choice task or in the gap-filling one. On the other hand, the students generally coped relatively well with the error correction task.

Certainly, it can be assumed that the more motivated students are interested in Business English, understand the importance of the different skills, even the less obvious ones, such as correspondence (the less motivated ones might assume that everyone who works in a company and sends emails to foreigners has sufficient correspondence skills; indeed, company employees do send emails which diverge from the rules of formal business correspondence, Włosowicz & Kopeć, 2017) and economic knowledge, and are aware of their language needs. Thus, it may be supposed that they will remain motivated and attain a high level of competence in Business English.

However, one reservation needs to be made: as the motivation levels were indicated by the students themselves, it should be admitted that they were to some extent subjective. For example, one may have felt highly motivated (for

example, they found Business English interesting and exciting) but they may not have put enough effort in studying Business English and related economic topics, which led to lower results in the study. On the contrary, a person studying Business English with a view to a well-paid job in the future might study hard but without much curiosity, and such a learner might perceive their motivation as lower than it actually was. Thus, it must be remembered that motivation is a highly complex phenomenon and its role in learning Business English, though important, is not so straightforward and high motivation does not yet guarantee the mastery of all Business English skills.

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Teresa Maria Włosowicz

### **Zum Zusammenhang zwischen der Motivation der Studierenden, Wirtschaftsenglisch zu lernen, und ihren Sprachkenntnissen in Wirtschaftsenglisch**

#### Zusammenfassung

Gegenstand der vorliegenden Studie ist der Zusammenhang zwischen der Motivation von Anglistikstudenten, Wirtschaftsenglisch zu lernen, und ihren tatsächlichen Kenntnissen in Bezug auf Wirtschaftsterminologie, ausgewählte Wirtschaftsbegriffe und Grundlagen der Geschäftskorrespondenz. Im Rahmen der Studie wurde ein Kompetenztest im Bereich der Wirtschaftsterminologie, Wirtschaftsbegriffe bzw. Fehlerkorrektur in einem Geschäftsbrief durchgeführt sowie ein Fragebogen ausgefüllt. Die Ergebnisse zeigen, dass es Unterschiede sowohl in der Motivation der Studierenden als auch in ihren Sprachkenntnissen in Wirtschaftsenglisch gibt und dass manche Begriffe selbst für relativ fortgeschrittene Studenten eine Schwierigkeit darstellen. Auch wenn die Motivation eine gewisse Rolle spielt, scheint sie nicht entscheidend zu sein, weil die Wirtschaftssprache ein komplexes Wissensgebiet ist, dessen Beherrschung langfristige Anstrengungen erfordert. Allerdings ist ihr Bewusstsein von sprachlichen Bedürfnissen recht ausgeprägt, so dass es wahrscheinlich ist, dass sie motiviert bleiben und ein hohes Kompetenzniveau in Wirtschaftsenglisch erreichen werden.

*Schlüsselwörter:* Wirtschaftsenglisch, Motivation, Terminologie, sprachlicher Bedarf

## The Test Used in the Study

### PART 1: BUSINESS ENGLISH TEST

- 1) Choose the most appropriate word:
1. Buying a certain product or the products of a certain company regularly is referred to as
    - a) branding,
    - b) brand loyalty,
    - c) faithful shopping,
    - d) company attachment.
  2. All people connected with the activities of a company (its owners, employees, customers and potential customers, etc.) are called
    - a) involveds,
    - b) stakeholders,
    - c) shareholders,
    - d) companions.
  3. This company is particularly valued by students, who need to reconcile work with their studies, because it offers its employees
    - a) protectionism,
    - b) job satisfaction,
    - c) outsourcing,
    - d) flexitime.
  4. If a country exports more than it imports, it has a trade
    - a) balance,
    - b) surplus,
    - c) gain,
    - d) income.
  5. Combining two companies of similar sizes and status into one in which they have equal rights is called a(n)
    - a) merger,
    - b) takeover,

- c) acquisition,
  - d) vertical integration.
6. Working from home and sending one's work (translations, designs, etc.) to the company by email can be referred to as
- a) flexibility,
  - b) job sharing,
  - c) emailing,
  - d) telecommuting.
7. A market where **the supply is greater than the demand** can be referred to as a
- a) seller's market,
  - b) buyer's market,
  - c) social market,
  - d) free market.
8. Products which go bad quickly, such as food, are called
- a) perishables,
  - b) generic products,
  - c) fast moving consumer goods,
  - d) products past the sell-by date.
9. The fact that a company focuses on its core activities and commissions external experts, companies, etc. to do certain things for it is called
- a) consultancy services,
  - b) cost-effective management,
  - c) outsourcing,
  - d) a portfolio.
10. One of the key indicators of the state of a country's economy is NOT
- a) the amount of money being spent on advertising,
  - b) inflation,
  - c) consumer spending, or how much money people are spending in the shops,
  - d) the jobs market, including the unemployment rate.

2) Fill in the gaps:

1. The acronym SWOT, as in SWOT analysis, stands for: \_\_\_\_\_,  
\_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_.

2. \_\_\_\_\_ taxes are paid on one's income, while \_\_\_\_\_ taxes are paid when one buys some products and the tax is included in the price of the products (e.g. VAT).

3. The acronym USP stands for \_\_\_\_\_

4. The abbreviation ASAP stands for \_\_\_\_\_

5. One should not spend all one's life at work. Instead, many experts recommend work-life \_\_\_\_\_

6. Contact with customers gives salespeople \_\_\_\_\_-on experience.

7. The set of stereotypes, prejudices, etc. which prevent women from reaching senior executive positions is referred to as the \_\_\_\_\_ ceiling.

8. The abbreviation AGM stands for \_\_\_\_\_

9. This car is more \_\_\_\_\_ than the other because it uses less petrol.

10. The person responsible for preparing a company's balance sheets is its chief \_\_\_\_\_.

3) Correct the errors in the enquiry. Pay attention to the content, form and layout.

April 21, 2017  
Computer World Ltd.  
25, Fox Street  
London SW 105

Dear Sir,

I want to order a computer from your company, but I have a few questions to ask you.

First of all, do you send any free samples? If so, can I get one?

Secondly, how much would the computer cost? Third, may I have it delivered to my home?

And, finally, is there any after-sales customer care?

Best regards,  
Mr Adam Williams



Your comments:

4) General knowledge of business and economics.

1. In marketing, the four P's and the three additional P's include:

a) 1. product, price, planning and promotion, and 2. people, process and protection of customers,

b) 1. project, production, place and promotion, and 2. people, physical presence (or physical evidence) and process,

c) 1. product, price, place and promotion, and 2. people, physical presence (or physical evidence) and process,

d) 1. production, price, place and planning, and 2. people, physical presence (or physical evidence) and process.

2. One of the benefits of international trade is NOT:

a) the possibility of buying products which would otherwise be unavailable in one's country, such as citrus fruit,

b) allowing every country to manufacture products for which it has particularly good conditions, for example, wine in a climate which allows the growing of high-quality grapes,

c) protectionism,

d) closer economic ties between countries.

3. A mixed economy

a) manufactures different kinds of products,

b) has both private and state-owned companies,

c) has more than one currency in use,

d) is chaotic and not controlled by anybody.

4. The term 'fair trade' refers to

a) trade in which part of the income is donated to charity,

b) trade in sustainable goods,

c) a positive balance of trade,

d) trade that ensures farmers in poor countries a sufficient income and good working conditions.

5. In management, what is the difference between Theory X and Theory Y?

a) Theory X assumes that people are lazy by nature and have to be forced to work by an authoritarian manager, while Theory Y assumes that people want to feel valued for their work and to participate in decision-making, so management should be democratic,

b) Theory X assumes that decisions are best made anonymously, and theory Y requires transparency and voting in public,

c) Theory X is based on past experience, while Theory Y is based on planning future activities,

d) Theory X involves democratic management, while Theory Y requires managers to be authoritarian.

## The Questionnaire Used in the Study

### PART 2: QUESTIONNAIRE

Sex: F\_\_\_/M\_\_\_

1. L1 (native language): \_\_\_\_\_  
L2: \_\_\_\_\_ Level of proficiency/time of study: \_\_\_\_\_  
L3: \_\_\_\_\_ Level of proficiency/time of study: \_\_\_\_\_  
What other languages have you studied? (Please, indicate the proficiency levels.)
  
- 2) How strong is your overall motivation for studying Business English?  
1 – very weak, 5 – very strong  
1 2 3 4 5  
Why? (You can choose as many answers as you want.)
  - I want to use it in my future job, for example, as a translator.
  - I want to become a business person.
  - I want to combine English Philology with another profession, such as economics, management, marketing, etc.
  - I am interested in Business English in general.
  - I am interested in business and economics.
  - It is one of the subjects I study at university and I want to have good marks in it.
  - My motivation is actually weak, because it has turned out I chose the wrong specialization.
  - other (please, specify) \_\_\_\_\_
  
- 3) How strong is your motivation for studying business vocabulary and terminology? 1 – very weak, 5 – very strong  
1 2 3 4 5  
Why? (You can choose as many answers as you want.)
  - Vocabulary has to be used with precision.
  - Vocabulary is indispensable to understand Business English texts.
  - Vocabulary knowledge allows me to understand the underlying phenomena better.

- Business English vocabulary is very interesting.
- I think that business vocabulary in English and Polish reflects some cultural differences between both countries.
- I want to have a good mark in Business English.
- Vocabulary is not very motivating because it only requires learning the English equivalents of Polish terms.
- Vocabulary is not very motivating because it is very easy to learn.
- Vocabulary is not very important as long as you possess enough background knowledge of economics and you can make yourself understand.
- other (please, specify) \_\_\_\_\_

4) How strong is your motivation for learning business correspondence?  
1 – very weak, 5 – very strong

1 2 3 4 5

Why? (You can choose as many answers as you want.)

- It is going to be useful in my future job.
- I already work in a company and my knowledge of business correspondence is very useful to me.
- It is an interesting reflection of cultural differences between Poland and the English-speaking countries.
- I am interested in intercultural communication is general.
- Correspondence is one of the most important activities in business.
- Learning business correspondence is fun because it allows me to imagine that I am another person, for example, a manager writing on behalf of my company.
- Business correspondence helps me to develop my creativity.
- I want to have a good mark in business correspondence.
- I am not interested in business correspondence, but I have to learn it.
- It is boring because I cannot see any significant differences between Polish and English business correspondence.
- other (please, specify) \_\_\_\_\_

How strong is your motivation for acquiring background knowledge of business and economics? 1 – very weak, 5 – very strong

1 2 3 4 5

Why? (You can choose as many answers as you want.)

- I do not think I need any economic knowledge; it is enough to know the necessary vocabulary, expressions, etc.
- Background knowledge is necessary if you want to understand the concepts underlying economic vocabulary.
- I am interested in business and economics in general.
- Business communication requires a certain knowledge of the field.

- Apart from English Philology, I study or want to study economics (or marketing, management, etc.) too.
- Translation requires a lot of background knowledge and I want to translate business texts.
- for another reason (please, specify) \_\_\_\_\_

5) What do you do in order to learn Business English? (You can choose as many answers as you want.)

- I ONLY rely on what we do at university and I do my homework, but I have no time for anything else.
- I study Business English at university and I do my homework, but I also study on my own.
- I read books in economics in English on my own.
- I read press articles in economics in English on my own.
- I read books and press articles in economics in Polish in order to expand my general knowledge of the field.
- I do exercises from Business English textbooks on my own.
- I work in a company and use every opportunity to use Business English there
- I consult experts in the field, for example, economists who are fluent in English
- something else (please, specify) \_\_\_\_\_

6) How difficult did you find the test you filled in for the present study? 1 – very easy, 2 – very difficult

1 2 3 4 5

Why? (Please, justify your answer.)



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## Acquisition of Structures at Syntax-Discourse Interface: Post-Verbal Subjects in L2 English

### Abstract

The present study explores the acceptability of postverbal subjects by intermediate and advanced L2 English learners with L1 Macedonian, a pro-drop Slavic language with rich verbal morphology. The two languages differ regarding the distribution of subject-verb inversion (SVI): in Macedonian, it is a default pattern inthetic sentences, but English severely restricts SVI to specific contexts. To test the hypothesis that Macedonian learners encounter difficulties in acquisition of English SVI because of crosslinguistic influence, a grammaticality judgement and correction task was administered to two groups of Macedonian learners of English and a control group of English native speakers. The results revealed that L2 learners find English VS sentences and VS + *it*-insertion examples more acceptable than the native speakers, but the performance of the advanced group is closer to the native speakers than to the intermediate learners. Both non-native groups accept more readily inappropriate English sentences that conform to typical L1 structures.

*Keywords:* subject inversion, information structure, word order, interface hypothesis

This paper reports the findings of the investigation into the acquisition of post-verbal nominal subjects by L2 English learners with L1 Macedonian. We examine the presence of inverted subjects in the interlanguage of Macedonian learners of English. Although both languages typologically belong to SVO languages, English has a rigid word order which restricts SV inversion to specific contexts. In Macedonian, a Slavic language with rich verbal morphology

and null referential subjects, the word order is more flexible. The mapping of arguments to syntactic positions is conditioned by the universal cognitive principle that old information precedes new information (Comrie 1989, p. 127) to facilitate its processing. This results in a much higher frequency of postverbal subjects in Macedonian, compared to English (Mitkovska & Bužarovska, 2023).

In view of these cross-linguistic differences, the paper aims to determine whether Macedonian learners of English at intermediate and advanced proficiency levels have become aware of the subject-verb inversion restrictions in English. Assuming that L2 learners rely on pragmatic knowledge from their L1 system in building their interlanguage (Gómez Soler, 2013), we attribute the presence of inappropriate postverbal subject constructions in the English interlanguage of Macedonian L1 learners to cross-linguistic influence from L1. At lower proficiency stages, learners experience syntactic deficiencies related to subject realization. They tend to transfer null and postverbal subjects relying on the information structure of such constructions in L1 (cf. Oshita, 2004; Lozano & Mendikoetxea, 2010; Judy & Rothman, 2010; Prentza & Tsimpli, 2013; Mitkovska & Bužarovska, 2018, among others). Since Macedonian requires postverbal subjects, learners of English expand the use of VS in contexts unacceptable for native speakers following the pragmatically-driven word order of their L1. Partial overlap between parallel structures in L1 and L2, as is the case with VS, leads to the overuse of postverbal subjects in the initial stages of L2 acquisition because learners assume complete equivalence between these structures. This is especially true if the L1 structure has a broader functional scope compared to the corresponding L2 structure. Once learners notice the divergence, which typically occurs when they reach a more advanced level of L2, the tendency for overgeneralization of the syntactic rules of L1 subsides and learners approximate native speakers' use of this structure.

The examination of students' academic works in English and in the Macedonian English Learner Corpus (MELC) shows that L1 Macedonian learners of English encounter difficulties with the English word order. The attested atypical VS structures are presented below: type (a) contains intransitive unaccusative verbs (1 and 2) and transitive verbs in passive voice (3), type (b) contains transitive verbs in active voice (4), while in type (c) a dummy *it* is inserted in subject position (5 and 6). The use of SVI in passive voice sentences dominates, very often with an inserted dummy *it*.

(a) Adjunct + VS

- (1) On the position of post-modifiers **can stand** *either phrases or clauses*.
- (2) A week before in my class **came** *a new girl by name Mila*.
- (3) In both texts **is also raised** *the question of directionality in conversation*.

(b) (Adjunct) + OVS

(4) The most important role in producing a vowel **has** *the tongue*.

(c) (Adjunct) + it + VS

(5) *It should be used* “*these*” because the noun is in plural.

(6) I promise that this time *it won't happen anything that will postpone our deal*.

In this study we set out to examine intermediate and advanced level learners' acceptance rate of the attested types of deviating sentences. We attempt to answer the following research questions:

1. Are Macedonian learners of English sensitive to the constraints of subject-verb inversion (SVI) in contemporary English in the same way as native speakers (NS)?
2. Do these learners understand that the pronoun *it* cannot fill the subject position if the subject NP is postposed?
3. Is there a difference between the advanced and the intermediate learners in these respects?
4. In what ways does the learners' L1 affect their judgement of such constructions?

The paper is organized as follows: the next section introduces the theoretical prerequisites of our investigation based on the contrastive analysis of SVI in the two languages. The third section briefly explains the research methodology applied in the analysis of obtained results which are presented in the “Results” section of this paper. The following section is devoted to the discussion of the results. The last section summarizes the findings of the investigation and draws final conclusions.

## Theoretical Background

### Subject-Verb Inversion in English and in Macedonian

From a typological perspective, subject-verb inversion is a syntactic manifestation of theticity realized by presentational constructions and event reporting sentences. In “presentational sentences proper the newly introduced element is an entity (a discourse referent), while in event-reporting sentences it is an event, which necessarily involves an entity” (Lambrecht 1994, p. 144). This discourse function triggers a wide focus reading in presentational constructions reflected in the following constituent order: the adverbial carrying presupposed

information occupies the sentence-initial position, followed by the verb and the focused subject. By placing the subject in focus, the speaker asserts the presence of a discourse-new subject referent at a given location. The fronted adverbial, known as stage topic (Erteschik-Shir, 2007; Lahousse, 2007), sets the spatio-temporal frame for the appearance or existence of the new participant on the stage of discourse. Stage topics may be covert when contextually understood, but without them the whole sentence is in focus. No inversion occurs in English event-reporting sentences with sentence focus information structure.

Languages display different levels of sensitivity to the discourse-syntactic and lexicon-syntactic constraints that regulate word order. In generative approaches these variations are linked to the so-called null subject parameter (NSP). It is claimed that languages that allow null pronominal subjects (e.g., Italian, Spanish, and Greek) exhibit fewer restrictions on SVI than non-null subject languages, such as English and French (e.g., Teixeira, 2018; Agathopoulou, 2009; Lozano & Callies, 2018; Lozano & Mendikoetxea, 2008). English and Macedonian are positioned at the opposite ends of this typological continuum: English rigorously sanctions the omission of referential subject pronouns<sup>1</sup> and permits non-referential dummy subjects. Macedonian, on the other hand, disallows dummy subjects while the distribution of referential pronominal subjects is entirely regulated by discourse principles (Mitkovska & Bužarovska, 2018). Consequently, SVI, though encountered in both languages, displays important differences in the analysis of parallel texts (Macedonian-English and English-Macedonian).<sup>2</sup> Research results reveal sharp distributional differences between the languages: Macedonian texts contained 5.23 examples of SVI per 1000 words compared to only 0.46 examples in corresponding English texts. This testifies to a considerably wider distribution of this phenomenon in Macedonian than in English. The infrequent use of SVI in English was confirmed in corpus studies (Biber et al., 1999). Yet, the analysis of the attested Macedonian and English clauses with SVI showed that they share some structural properties. Thus, proportionally, SVI structures in both languages are more often encountered in main clauses headed by an element which is otherwise placed towards the end within predicate focus. These elements usually code locative circumstances (stage topics), while other types (temporal, manner, instrument or reason) are seldom found in both languages.

It has been noticed that the discourse function of the presentational construction imposes semantic constraints on the choice of verbs, as well as on the length of the inverted subject. Studies on the English SVI show that it overwhelmingly occurs with unaccusative verbs. Informationally “light” unergative

<sup>1</sup> Except in some colloquial registers (Haegeman, 2007).

<sup>2</sup> This research was done by Mitkovska and Bužarovska on selected texts in two written genres: prose fiction and academic texts, translated in both directions (Macedonian to English and English to Macedonian).

verbs with impoverished semantics are admitted in certain contexts (Levin & Rappaport Hovav, 1995, pp. 251–260). These verbs lose their noteworthiness and informativeness in contexts in which their relation with the subjects is highly predictable (Mendikoetxea, 2006; Teixeira, 2018). It should be noted that the same verb may oscillate between SV and VS order depending on the communicative goal of the sentence, namely whether it expresses athetic or a categorial statement.<sup>3</sup>

Regarding the type of verb in the predicate, Mitkovska and Bužarovska (2023) found that in both languages SVI occurs with copula verbs, intransitive verbs and passivized transitive verbs.<sup>4</sup> SVI with these three verbal forms are not equally distributed in the two languages. Thus, inversion with the copula *be*<sup>5</sup> is more frequent in English, while SVI clauses with passive verb forms dominate in Macedonian (both *be* and reflexive *se*-passives). Similar disproportion characterizes the distribution of intransitive verbs in SVI structures: 73.36% of the Macedonian examples contain intransitive verbs compared to 38.46% in English. The English construction typically limits the range of verbs to the “core” unaccusatives, that is, verbs of existence, appearance, and directed motion which imply existence or appearance at a location (*lie, stand, appear, come*). This constraint has been pointed out in the literature (Levin & Rappaport Hovav, 1995; Birner, 1995; among others), along with the conditions for SVI occurrence with change of state unaccusative verbs and “core” unergatives (Teixeira, 2018, pp. 67–81). In Macedonian, the construction tolerates all types of unaccusative verbs (including decausative and pseudo-passive constructions) and even core unergative verbs. This has also been observed in Italian and Spanish, which use inversion as “focalisation device” with all verb types (Lozano & Mendikoetxea, 2008; Lozano & Callies, 2018).

In both Macedonian and English, the discourse-new inverted subjects in the examined texts refer either to brand new or accessible participants from the previous discourse (as claimed for English, e.g., in Birner, 1994). However, the syntactic complexity of the subject does not seem to impact equally the inversion in the two languages. Only a third of the inverted subjects in the Macedonian sample comply with the end-weight principle, which indicates that this principle is not decisive in triggering SVI in this language. For English, corpus studies have shown that in 70–80% of the examples the inverted subjects are heavy (Prado Alonso, 2011, p. 79).

The distributional constraints of SVI in English in comparison to Macedonian (and other languages with a flexible word order) may be attributed

<sup>3</sup> Categorical statements have a topic-comment information structure.

<sup>4</sup> Transitive verbs are allowed in their passive form in English (Teixeira, 2018, p. 77).

<sup>5</sup> The copula *be* has been reported to be the most frequently occurring predicate in the English locative inversion sentences (e.g., Teixeira, 2018, p. 67; Biber et al., 1999, p. 954; Levin & Rappaport Hovav, 1995, p. 240).

to its pragmatic function. In English, SVI creates rhetorical effects in narrative and descriptive discourse. These effects are described under different terms: camera movement (Dorgeloh, 1997, p. 104), vividness (Prado-Alonso, 2011, p. 55), immediate observer effect (Kreyer, 2006), dramatic effect (Quirk et al., 1985, p. 522), suspense and tension effects (Chen, 2003, p. 234). Mitkovska and Bužarovska (2023) attribute the distributional contrast between Macedonian and English SVI to the differences in the discourse-pragmatic properties of SVI in the two languages, arguing that in Macedonian VS is the default order for presentational function, characteristic ofthetic statements, while in English this discourse function is restricted by the rigid SV(O) word order. The small number of English presentational constructions is stylistically marked, occurring in special discourse contexts. In unmarked uses their translational equivalents lack SVI, as shown in examples (from Macedonian prose) with an unaccusative verb (7), *se*-passive (8), and an ergative verb (9).

- (7) Na edna leska **stoeše** *bel polžav*.  
'A white snail **was sitting** on a hazel tree.'
- (8) Od nivnata vreva, [...] ne **se sluša** ni *telefonot*, ni *domofonot*.  
'Because of their racket, [...] neither *the telephone*, nor *the speaker-phone* [...] **can be heard**.'
- (9) Po sviocite **frčat** *koli* so mladi majki izbrzani od rabota. Preku uličkrite **pretrčuvaat** *mački* [...].  
'Cars with young mothers hurrying from work **speed** around the curves. *Cats run* across the alleys [...].'

The above contrastive analysis leads to the following conclusions. The application of SVI in English is highly limited in comparison to Macedonian. In English, theticity is coded only in presentational constructions which are stylistically marked and restricted to special contexts. In Macedonian, SVI in presentational constructions, as a default word order, is unable to produce dramatic effects. Therefore, we assume that the differences in the functional scope of SVI and its rhetoric load may affect the acquisition of English SVI by Macedonian learners.

## Second Language Acquisition Research on Subject—Verb Inversion

Acquisition of the null subject and related structures, including subject inversion, has received a great deal of attention in the literature. In some frameworks VS structures are considered to belong to interface phenomena which

result from the interaction between syntax and discourse. Regarding language acquisition, especially SLA, the syntax-discourse interface is claimed to be a problem area even for near-native speakers (Teixeira, 2018, p. 152). Numerous studies investigating such features use the Interface Hypothesis to account for the prolonged developmental difficulties in the acquisition of L2. The Interface Hypothesis (IH) claims that properties resulting from the interaction of grammar internal domains (e.g., syntax-lexicon) with grammar external domains (e.g., syntax-discourse interface) are more difficult to acquire than the properties within the grammar itself. Moreover, properties depending on the interaction between syntax and grammar-external domains (discourse and pragmatics), can never be fully acquired due to processing limitations. Therefore, they display permanent optionality (Tsimplici & Sorace, 2006; Sorace, 2011), that is, they cannot be completely acquirable in a second language, in contrast to “narrow grammar” structures. Consequently, developmental problems manifested at the syntax–discourse interface are not attributed to formal features but to “inefficient processing strategies to coordinate syntactic and pragmatic knowledge” (Sorace & Filiaci, 2006, p. 345).

The IH was tested in a number of studies involving interface features. Indeed, studies focusing on distribution of pronominal subjects and SV inversion in the interlanguage of advanced Spanish and Italian learners with English L1 (non-null-subject L1 > null-subject L2) suggest that morphosyntactic properties are acquired before discourse properties and the properties interacting with discourse create persisting difficulties (Lozano, 2006, 2014; Belletti et al., 2007). However, experimental studies involving the reverse direction of acquisition: null-subject L1 > non-null L2 (English) could not give definitive answers whether interface properties are ultimately acquirable in L2 (Prentza & Tsimplici, 2013). They suggest that the acquisition of syntactic properties depends on the directionality of acquisition, that is, whether L1 constitutes a subset or a superset in comparison to L2 for a given property (Judy & Rothman, 2010; Judy, 2011).

Research findings on SVI show that advanced speakers of null-subject L1 allow inversion structures with frequent unaccusative verbs predominantly with structurally complex subjects (Oshita, 2000; 2004; Prentza & Tsimplici, 2013). Some studies attribute an equal role to the three interfaces (lexicon-syntax, syntax-discourse, and syntax-phonology) in production of VS structures in L2 English (Lozano, 2006; Lozano & Mendikoetxea, 2008, 2010), although the impact of subject heaviness as a feature of the syntax-phonology interface has not been fully confirmed (Agathopoulou, 2014). While acknowledging that VS with unaccusatives is conditioned by discourse factors, such as the principle of end focus, it is not always clear what is more prevalent in triggering inversion in L2 English. It is suggested that “the syntax of subjects” is more difficult to acquire in null subject L1–L2 English pairings as they cause more devel-

opmental problems (Teixeira, 2018, p. 174). These problems are manifested in the overuse of SVI, as observed by Lozano and Mendikoetxea (2010) regarding Spanish learners of L2 English and Prentza (2014) for Greek learners. Similar problems are detected in Macedonian learners.

We think that the optionality of VS/SV order in presentational constructions can be explained if the notion of “discourse constraints” subsumes stylistic choices between alternative word orders. Authors of various texts, especially fiction, subjectively decide whether to choose one of the alternatives. It has been noted that even native speakers of English disagree on particular uses of SVI (see Agathopoulou, 2014). These unwritten rules of stylistically-based syntactic choice of otherwise infrequent VS structures are not explicitly taught in schools. Their rare use and paucity of input are factors that contribute to the developmental difficulties (Slabakova, 2015),<sup>6</sup> which explains why their distribution cannot be fully acquired by advanced or near native learners.

Hence, it can be assumed that these problems may not stem from “processing inefficiencies,” as the IH predicts, but from restricted distributional properties of English VS structures due to their typological differences and predominantly marked stylistic status. The former factor causes syntactic problems (Prentza & Tsimpli, 2013) which lead to transfer. Thus Prentza (2014, p. 1775) argues that “L1 transfer in the process of L2 acquisition amounts to an incorrect application of L1 syntactic properties in structures where L1 and L2 abstract syntactic features differ.” Similarly, Lozano and Mendikoetxea (2010) suggest transfer and input as possible explanations for difficulties in acquisition of subject inversion.

Drawing on the ideas presented above, we assume that L2 learners with null-subject L1 (Macedonian) use and accept postverbal subjects inappropriately due to crosslinguistic influence of discourse-syntax properties of SVI in L1. This influence is manifested at two levels: as deficits regarding the “syntax of subject” at earlier stages of acquisition (*it*-insertion) and as discourse-pragmatic deficits at advanced stages (reflected in SVI overproduction).<sup>7</sup> Failure to acquire the stylistic-pragmatic functions of inversion in English causes difficulties in discriminating the acceptable from unacceptable discourse contexts.

To test the main hypothesis that intermediate and advanced Macedonian learners of English overuse SVI in their L2 because of the wider use of SV inversion in their L1 we put forward the following sub-hypotheses:

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<sup>6</sup>Slabakova (2015) challenges the IH, arguing that the only unattainable properties at syntax-discourse interface at advanced level are those that are different in L1 and L2, and that are underrepresented in the input.

<sup>7</sup>That the acquisition of purely syntactic properties precedes the acquisition of discourse constraints on syntax is shown in some studies referred to in Teixeira (2018, p. 175).

1. Native speakers' acceptance of VS structures is lower than that of the learners of both levels, but the advanced learners perform closer to the native speakers than the intermediate ones.
2. Native speakers do not accept the inserted *it* in VS constructions in contrast to Macedonian learners.
3. Acceptance is generally lower for sentences where the post-verbal subject is given/old information.
4. The least acceptable examples are those with short post-verbal subjects, which violate the end-weight principle.

## Research Methodology

The participants of this study formed an experimental group of L1 Macedonian learners of English and a control group of English native speakers. A grammaticality judgement and correction task (GJCT) was administered to both groups in order to test the respondents' acceptance of post-verbal subjects in English. The Macedonian-speaking L2 English learners were 138 university students of English, aged between 18–28 years. Of those, 66 students were at an intermediate level of L2 English, comprising level B1 and B2 according to The Common European Framework of Reference for Languages (CEFR), and 72 students at an advanced to proficiency level, comprising CEFR's C1 and C2. Students were tested by means of a short placement test used for determining the proficiency level of the Macedonian L2 English learners participating in data collection for MELC. One hundred adult native speakers of English (66 American, 23 British, 8 Canadian, 3 Australian) were also asked to complete this test so that a comparison could be drawn between the results produced by the native speakers' and the students' judgement regarding the acceptability of the test items.

The GJC task consisted of 30 sentences, of which the sentences with SV inversion (as examples 1 to 4 above) and SV inversion with *it*-insertion (examples 5–6) were the central focus of the investigation. In designing the GJC task, we tried to make it representative of the types of VS examples attested in students' written works. We tried to balance the choice of VS sentences in GJC task considering the semantics of their predicates: they are represented by unaccusative verbs (*come, appear, happen, belong*), copular predicates, transitive verbs in passive and one in active voice. In terms of information structure, the majority of the VS sentences expressthetic statements with the subject in focus; for sentences in which the subject referent is given information (sentence 8 in Table 2) a preceding sentence is provided. VS sentences with an expletive

*it* placed in initial position feature prominently in students' works, which was the reason for their inclusion in the task. They are referred to as *it*-insertion (cf. Lozano & Mendikoetxea, 2008, 2010; Agathopoulou, 2014). Two more types of sentences were chosen for the task: sentences with non-referential null subjects (10) and sentences with referential null subjects (11). The former type was meant to check whether there is a correlation between null subjects and *it*-insertion in VS constructions, while the latter served as distractors.

(10) For pronunciation \_ is very important to practice as much as we can.

(11) I have classes in the morning so \_ could come at two o'clock.

In addition, two types of grammatically correct sentences were included: SV sentences with unaccusative and passive verbs (12) and SV sentences with non-referential *it* (13).

(12) Suddenly two faces appeared at our window.

(13) In English it isn't always easy to know how to pronounce the words.

The following research procedure was applied: respondents were instructed to judge the sentences as 'correct' or 'incorrect' and then explain or correct the error in the allotted time (20 minutes). The answer was counted as 'incorrect' if the error they indicated was related to subject position, subject omission or unnecessary *it*-insertion.

In cases when the respondents specified other reasons for their judgement of a sentence as 'incorrect' (articles, tense, prepositions, etc.) the answer was counted as 'correct.' For each sentence, scores (expressed in terms of percentages of the respondents' judgements of a sentence as 'correct') were calculated and compared between the two groups (students and native speakers) and between the two learner levels within the students' group.

## Results

### Overall Results

The overall results are presented in Table 1. Percentages indicate attained levels of acceptance of the following structures examined in this study: (a) sentences with VS word order, (b) sentences with VS order and *it*-insertion,

(c) correct task sentences with SV word order, and (d) sentences containing a required non-referential *it*. Native speakers of English largely rejected the VS sentences, while about 60% of intermediate learners did not find them unusual. The acceptance level of the advanced learners, which scored somewhere in-between the two groups, corroborate the sub-hypothesis 1. Indeed, the NS' acceptance of VS structures was lower than that of the learners and intermediate students were more likely to accept such structures than the advanced students.

The results related to *it*-insertion support the sub-hypothesis 2 even more strongly. NS demonstrate a strong rejection of inserted *it* in VS constructions. The score of 3.20% acceptance could be caused by oversight or fatigue. At intermediate level, the acceptance rate of inserted *it* is quite high (64.84%), as expected, but this rate drops significantly at the advanced level (24.16%), signaling that these learners have mostly overcome the *it*-insertion developmental phase.

**Table 1**  
*Overall Results*

Types of constructions in the GJCT	<b>B</b> <i>n</i> = 66	<b>C</b> <i>n</i> = 72	<b>NS</b> <i>n</i> = 100
	%	%	%
VS	62.12	30.75	12.71
VS with <i>it</i> -insertion	64.84	24.16	3.20
SV with unaccusatives and passives	96.21	99.30	98.75
SV with expletive and anticipatory <i>it</i>	93.56	98.26	96.25

**Key:** B – Macedonian students at intermediate level of English proficiency, C – Macedonian students at advanced level of English proficiency, NS – Native speakers

Single factor ANOVA results show a significant difference of  $p < 0.002$  between the three groups for VS, whereas for VS with *it*-insertion, there was a significant difference of  $p < 0.000$ . Based on one-tailed *t*-test, the difference between the intermediate and advanced learners for these two variables together is much greater than the difference between advanced learners and NS. More specifically, the test revealed significant pairwise differences of  $p < 0.004$  between groups B and C, and  $p < 0.038$  between groups C and NS.

Results obtained for correct sentences present a different picture. Even though a large number of learners did not correct the less acceptable VS constructions, most of them accepted the SV sentences with the same type of verb forms. Sentences with non-referential subjects were also well accepted. In both types of sentences, the learners did not differ significantly from the NS group.

## Results for SV Inversion

The acceptability results obtained for each of the seven task sentences with VS word order are presented in Table 2. In this type of constructions, all groups show different levels of acceptance for the individual sentences, as they differ regarding the verb meaning and form, the information status and the length of the postposed subject NP.

**Table 2**  
*Results for Sentences with SV Inversion\**

GJCT sentences	B n = 66		C n = 72		NS n = 100	
	Nr	%	Nr	%	Nr	%
24. Later <u>came</u> a world of disorder, during and after the First World War. (unaccusative)	58	87.88	58	80.55	67	67.00
4. In the group of non-finite clauses <u>belong</u> also the past participle clauses. (unaccusative)	43	65.15	31	43.50	11	11.00
27. Here we can see that the action is completed and <u>should be used</u> past simple. (passives)	45	68.11	20	27.78	4	4.00
30. At the reception <u>are invited</u> only close family members and some friends. (passive)	44	66.67	19	26.39	5	5.00
1. In dictionaries usually <u>is given</u> the class of the word. (passive)	46	69.70	14	19.44	0	0.00
18. In the production of vowels important role <u>plays</u> the tongue. (transitive)	24	36.36	8	11.11	0	0.00
8. This tense is also used for immediate future. In the following examples <u>is illustrated</u> this function. (passive)	27	40.90	5	6.94	2	2.00
Total:	287	62.12	155	30.75	89	12.71

\*Numbers of the sentences in the tables correspond to the numbers they had in the test. The sentences in the tables are ordered according to the C level results from most to the least acceptable.

As shown above, the single factor ANOVA for the overall results revealed a significant difference between the three groups. One-tailed *t*-test was conducted to examine the difference between the groups. It pointed to a significant difference between groups B and C ( $p < 0.009$ ) and groups B and NS ( $p < 0.000$ ), while the difference between groups C and NS was not significant ( $p < 0.097$ ). This may indicate that advanced level learners have attained native speaker knowledge of the English subject verb inversion structures. However, a careful examination of the data obtained for each sentence reveals that all respondents, including the NS, rated sentence 24 as the most acceptable of all. Although the percentage of acceptance is higher in the learners' groups, the difference rate between the scores of NS and intermediate and advanced learners is much smaller than for the other sentences. This sentence skewed the results and distorted the relations between the groups, especially between the group of advanced learners and NS. Upon removing sentence 24, the significance coefficient increased ( $p < 0.007$ ) indicating a significant difference between these two groups.

### Results for SV Inversion + *it*-insertion

The data obtained for the five sentences containing SV inversion + *it*-insertion are presented in Table 3. Results for individual sentences show similar differences as the overall scores, which proved to be statistically significant ( $p < 0.000$ ). While NS almost completely rejected these sentences, a large number of learners accepted them as accurate. The acceptance rate is especially striking in the intermediate learners' group, where all the sentences, except sentence 16, were rated acceptable by 70–80% of the learners. These results were expected in light of the fact that the strategy of *it*-insertion in SV inversion structures was largely noticed in the language of intermediate level learners. In fact, most of our collected examples come from upper-intermediate learners. The high acceptance rate for sentence 9 corresponds to the frequent use of the structure 'it should be used NP' in intermediate students' works.

Advanced learners accepted the VS + *it*-insertion much less frequently than the intermediate ones. At this level, they seem to have come to grips with the use of expletive and anticipatory *it*, feeling more confident of its correct distribution. Intermediate learners' acceptance rates were considerably higher than those of the other two groups. However, the advanced learners' acceptance rate clearly differs from the NS rate, which indicates that some learners are still confused. The one-tailed *t*-test yielded significant difference between all groups:  $p < 0.003$  between groups B and C,  $p < 0.006$  between groups C and NS, and  $p < 0.000$  between groups B and NS.

**Table 3***Results for Sentences with SV Inversion + it-insertion\**

GJCT sentences	<b>B</b> <i>n</i> = 66		<b>C</b> <i>n</i> = 72		<b>NS</b> <i>n</i> = 100	
	Nr	%	Nr	%	Nr	%
29. Then in front of us it <u>appeared a dark creature with red eyes.</u> (unaccusative)	45	68.11	29	40.28	6	6.00
9. Instead of plural form 'were' it <u>should be used the singular form 'was'.</u> (passive)	53	80.3	23	31.94	3	3.00
23. It <u>is quite obvious the omission of the definite article "the".</u> (copula)	50	75.76	20	27.78	6	6.00
19. In both texts it <u>is also raised the question of definite articles.</u> (passive)	47	71.21	13	18.05	1	1.00
16. On the second day of my holiday it <u>happened an accident.</u> (unaccusative)	19	28.79	2	2.78	0	0.00
Total:	214	64.84	87	24.16	16	3.20

\*Numbers of the sentences in the tables correspond to the numbers they had in the test. The sentences in the tables are ordered according to the C level results from most to the least acceptable.

## Discussion

The findings of this study indicate that Macedonian learners of English encounter difficulties in acquisition of the English SVI constructions up to high levels of proficiency, thereby confirming our hypothesis that they accept sentences with subject inversion more often than native speakers. Though advanced learners performed better than the intermediate ones, still they differed significantly from the control group of native speakers. Considering the differences between the learners' L1 and L2, we suggest that learners are constrained by the discourse-syntactic rules of their first language. A number of researchers point out that learners' failures in production and reception of SVI (and other Null Subject Parameter properties) are caused by crosslinguistic influence (e.g., Prentza, 2014; Prentza & Tsimpli, 2013) imposed by the syntactic differences between L1 and L2. Lozano and Mendikoetxea (2010) found that Spanish learners produced significantly more ungrammatical postverbal structures than native English speakers. Given that VS sentences occur more frequently in Spanish, these results could be attributed to L1 transfer. However, if that was the only reason learners would be expected to produce many more

incorrect VS sentences. They conclude that the reason why learners cannot fully acquire L2 grammar “may be largely attributed to problems at integrating different types of knowledge at the interfaces” (p. 494).

We assume that Macedonian learners fail to judge SVI sentences correctly because of the differences in their functional scope and rhetoric load in L1 and L2. As observed in the section on subject-verb inversion in English and Macedonian, a number of studies have pointed out the particularly marked nature of the English construction and its restriction to specific contexts (Quirk et al., 1985; Dorgeloh, 1997; Chen, 2003; Kreyer, 2006). Even if all conditions for SVI were met, often it would not be considered fully appropriate.<sup>8</sup> Sentence 24 in the research task was accepted only by 67% of the NS, even though the verb *come* is the second most frequently occurring verb in VS sentences in English, following the copula *be* (Levin & Rappaport Hovav, 1995, p. 240) and the subject phrase is rather heavy.<sup>9</sup> The other unaccusative verb (*belong*) in sentence 4, reached only 11% acceptance. The discrepancy in the learners’ judgements is not pronounced. In the advanced group, the acceptance rate is reduced by half (80.55% for 24 vs. 43.50% for sentence 4) and the difference is rather small in the intermediate group (87.88% vs. 69.70). This suggests that a substantial number of learners at B level failed to perceive subtle differences between the SV inversion sentences, since in both sentences inversion would be the more natural word order in their L1.

Another strong evidence for L1 influence is the use of VS with passive sentences. Though they are possible in both languages,<sup>10</sup> Macedonian passives are more prone to presentative interpretation: the *be*-passive is rather resultative and the *se*-passive has mainly agent defocusing functions. NS generally rejected VS in passive constructions even when the dislocated subject was quite long and complex, as in sentence 30. Contrary to the NS’ judgement, about 65–70% of the intermediate and about 20–30% of the advanced learners rated most sentences with passive verbs acceptable, irrespective of their length (sentence 30) and complexity (sentence 27). However, the rates for sentence 18, containing subject—direct object inversion, suggest that learners do not treat active transitive constructions in the same way as intransitive and passive ones, demonstrating lower acceptance (intermediate 36.36%, advanced 11.11%), though this construction is also possible in their L1. The total rejection of this sentence by NS indicates stronger typological divergence between the two languages, which reduces the L1 influence effects.

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<sup>8</sup> According to Kreyer (2006), the language user as a creative writer (apart from syntactic complexity and information status) influences the use of SVI in English.

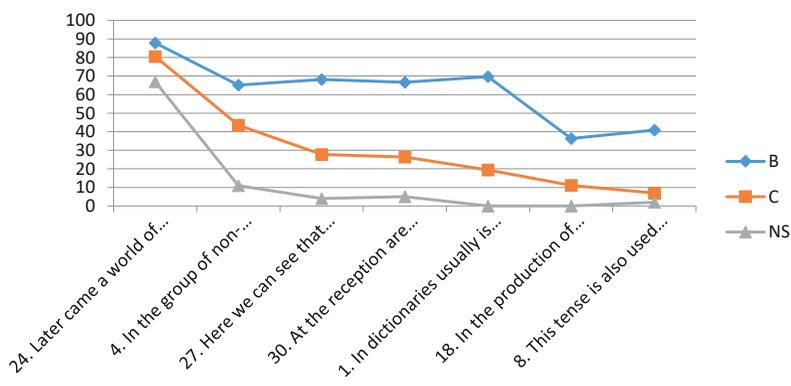
<sup>9</sup> Moreover, the sentence-initial adverb (*later*) resembles enumerative listing conjuncts, which trigger SV inversion and usually co-occur with the copula *be*, *go*, and *come* (Prado-Alonso, 2011, p. 140).

<sup>10</sup> According to Birner (1995), this is quite rare.

It should be noted, though, that sentence 8, where the subject referent is anaphorically related to the previous discourse, was accepted by fewer learners (40.9% intermediate and 6.94% advanced). This evidence proves the sub-hypothesis 3 that learners are sensitive to the information status of the inverted subject. Information-packaging is an important aspect of the English SVI (Birner, 1994; 1995), but the decisive factor for these results seems to be the fact that the discourse properties regulate the Macedonian VS structures. This indicates again a strong L1 influence on the learners' acceptance of the English SVI. Furthermore, the length of the inverted subject does not seem to play an important role: sentence 30, in which the inverted subject is rather long, was deemed slightly less acceptable than sentence 27, with a two-word subject (*past tense*). This goes counter to the sub-hypothesis 4. The advanced learners' results follow the same pattern, though at much lower degree.

**Figure 1**

*Results for VS Sentences in the Three Groups of Respondents*



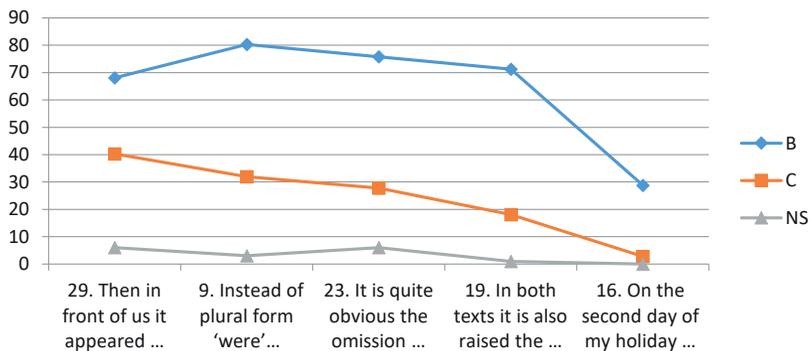
Regarding L2 development, our results confirm our sub-hypothesis concerning improvement in the advanced learners' group. The diagram in Figure 1 shows graphically that the advanced group's acceptance rates were in most cases closer to the NS' scores than to the intermediate learners' ones. However, we observe a noticeably higher level of acceptance in this group, compared to the NS' rates. Still, we cannot prove whether native-like attainment is constrained by the interplay of discourse-syntactic factors, since our advanced learners were not near-native speakers.

It seems that the infelicitous use of inverted structures is to be sought in discourse-pragmatic constraints of English, while the use of ungrammatical *it*-insertion belongs to syntactic deficits. Lozano and Callies (2018, p. 427) observe that: "Learners can eventually attain native-like competence of the discourse constraints that regulate word order in English but show some residual optionality in producing ungrammatical preverbal expletives (\*it/\* $\emptyset$ ), which is

argued to be a purely grammatical problem.” Our results displayed in Table 2 corroborate the findings that English learners with null-subject L1 resort to inserting a dummy *it* when inverting the subject (e.g., Oshita, 2004; Judy & Rothman, 2010; Lozano & Mendikoetxea, 2010; Prentza, 2014). The diagram in Figure 2 illustrates a clear developmental trend towards improvement in the advanced group.

**Figure 2**

*Results for VS + it-insertion Sentences in the Three Groups of Respondents*



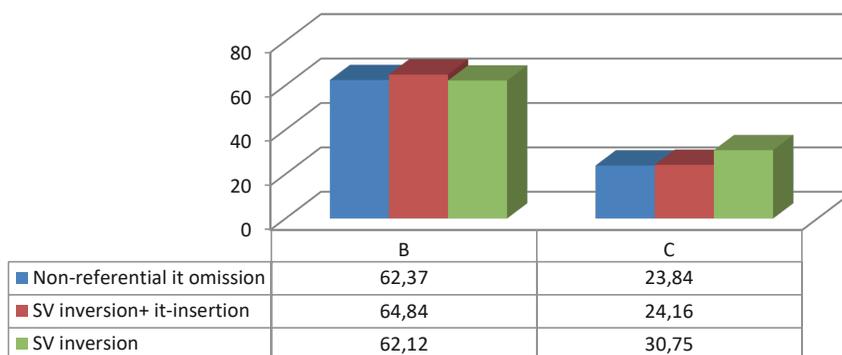
What motivates the learners' use of *it*-insertion in SVI is a puzzle worth investigating. As Lozano and Mendikoetxea (2010, p. 487) have pointed out, this construction “is neither in their L2 input nor directly a result of L1 transfer.” NS' reactions in our study strongly indicate that VS + *it*-insertion is not characteristic of English. Agathopoulou (2014, p. 178) reports similar rejection of this construction by the native English speakers she consulted. However, Oshita (2004, p. 121) attributes the occurrence of such structures in the Spanish and Italian learner language corpora to the pro-drop typology of their L1s, which allow null expletives. On the other hand, the speakers of topic-drop languages (Japanese and Korean), which lack null expletives, produce considerably fewer *it*-insertions. This explanation is challenged by the following asymmetrical findings: only one *it*-insertion was found in the L1 Greek learner corpus (Agathopoulou, 2014) compared to 38 and 27 occurrences in the Spanish and Italian learner corpora, respectively (Lozano & Mendikoetxea 2008, 2010).

Agathopoulou (2014, p. 182) allows for some possible L1 effects in the Italian data, suggesting, however, that the reasons for the Spanish–Greek data discrepancies should be sought in students' proficiency. Namely, Greek students whose contributions were included in the corpus were at advanced level, while the Spanish ones were intermediate learners of English. This explanation is strongly supported by our findings, which display a sharp difference between intermediate and advanced learners' acceptance rates.

We argue that the occurrence of *it*-insertion in L2 English of learners with a pro-drop L1 is in correlation with both the acquisition of non-referential *it* and the constraints of SVI in English. In our data, we observe parallel development of non-referential *it* omission, SV inversion and SV inversion plus *it*-insertion, shown in Figure 3, as the values for all three categories drop equally from intermediate to advanced level.

**Figure 3**

*Comparison of Acceptance Rates in Three Categories among the Learners' Groups*



Results show that there is a developmental correlation between *it*-insertion and the acquisition of null subjects. Numerous studies report that null-subject L1 learners of English have more difficulties in acquiring non-referential rather than referential subjects in English (e.g., Oshita, 2004; Judy & Rothman, 2010; Prentza & Tsimpli, 2013; Prentza, 2014). Mitkovska and Bužarovska (2018), analyzing data from learner corpus materials by L1 Macedonian speakers between 8 and 14 years of age, observe a steady decrease in omission of the expletive *it* from about 70% at A2 to about 30–40% at B1 and B2 level. This means that learners at intermediate level start becoming aware that the syntactic subject position is obligatorily filled with *it* in the absence of a referent. At that stage, intermediate learners receive exposure to input involving extraposition of clausal subjects and the “filler” function of the non-referential, cataphoric *it*. It is possible that learners may equate extraposed subject clause with postposed NP subjects, especially if the latter are longer.

## Concluding Remarks

The results of this research show that Macedonian learners generally find English VS sentences, as well as VS + *it*-insertion examples, more acceptable than native speakers of English, but the extent of this acceptance is variable depending on students' level of English proficiency. The differences between the groups proved statistically relevant confirming the sub-hypotheses 1 and 2.

The native speakers' results support the general opinion that VS sentences are not readily acceptable and that speakers' sensitivity to word order alterations displays variability. Yet, it is obvious that unaccusative verbs are more acceptable than verbs in passive voice. The sensitivity to subject information status and syntactic complexity is difficult to judge, as NS equally rejected sentences with long and short subjects, expressing both new and old information. The degree of learners' acceptance of VS structures depends on verbal semantics and the information status of the subject referent, but not on the syntactic complexity of the subject constituent.

The observed results reflect typical properties of SVI in Macedonian: acceptance of a wide range of verbs, especially in passive or passive-like constructions, equal acceptance of inversions with short and long subjects that have discourse-new information status. In both groups, the learners' high acceptance rate of postverbal subjects in sentences with VS pattern, unacceptable for English speakers, reflects the adherence to the pragmatic principle in Macedonian to place the discourse-new subject in focus. As noted by Prentza (2014), L1 transfer is most likely to occur "in structures where L1 and L2 abstract syntactic features differ" (p. 1775). This is most probably responsible for lingering syntactic deficits at syntax-discourse interface even at advanced level.

The sensibility to *it*-insertion marks the developmental stage when English learners become aware of expletive subjects in L2 but the word order is still regulated by the discourse rules of L1. The increase in expletive subject acquisition and greater awareness of VS constraints in English at advanced proficiency level parallels the decrease in acceptance of *it*-insertion.

The results of our investigation confirm the main hypothesis that L1 transfer effects are mainly responsible for the acceptance of post-verbal subjects in learner English. These effects stem from the information structure of the L1 sentences expressingthetic statements. In Macedonian, these constructions are realized by unaccusative verbs and *se*-passive or passive-like constructions whose unmarked word order is VS. In English, VS sentences are stylistically marked since subject inversion is restricted to certain registers and performs specific pragmatic functions. Moreover, the functional scope of SVI is much narrower in English because its use depends on author's narrative goals and stylistic preferences. The low distribution of SVI due to its rhetoric nature is

compounded by the fact that learners in formal educational settings do not receive sufficient evidence for the appropriate use of VS structures. All these factors cause difficulties in discriminating the acceptable from unacceptable discourse contexts and complicate the acquisition of SVI by learners whose L1 has a discourse-driven word order.

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## **Erwerb von Strukturen nach Syntax-Discourse Interface: Postverbale Subjekte in L2-Englisch**

### Zusammenfassung

Die vorliegende Studie untersucht die Akzeptabilität von postverbalen Subjekten durch L2-Englischler der Mittel- und Oberstufe mit L1-Mazedonisch, einer slawischen Nullsubjektsprache mit reicher Verbmorphologie. Die beiden Sprachen unterscheiden sich hinsichtlich der Verwendung von Subjekt-Verb-Inversion (SVI): im Mazedonischen ist die SVI ein Standardmuster in thetischen Sätzen, während sie im Englischen ausschließlich in bestimmten Kontexten verwendet wird. Um die Hypothese zu überprüfen, dass mazedonische Lernende aufgrund des sprachübergreifenden Einflusses auf Schwierigkeiten beim Erwerb der englischen SVI stoßen, wurde eine Aufgabe zur Beurteilung der Grammatikalität und Korrektur an zwei Gruppen mazedonischer Englischler und eine Kontrollgruppe englischer Muttersprachler gestellt. Die Ergebnisse zeigen, dass die L2-Lerner englische VS-Sätze bzw. VS-Beispiele mit dem eingefügten *it* akzeptabler finden als die Muttersprachler. Allerdings liegen die Sprachkenntnisse der fortgeschrittenen Gruppe näher bei den Muttersprachlern als bei den Lernern der Mittelstufe. Beide Nicht-Muttersprachler-Gruppen sind mehr bereit, inkorrekte englische Sätze zu akzeptieren, die den typischen L1-Strukturen entsprechen.

*Schlüsselwörter:* Subjektinversion, Informationsstruktur, Wortstellung, Interface-Hypothese



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## Contributions toward Understanding the Acquisition of Eight Aspects of Vocabulary Knowledge

### Abstract

With the intent of adding to the literature leading toward a more complete theory of second language vocabulary acquisition, this study elicited accuracy data from 110 ESL learners ranging from novice high to advanced low on 64 words randomly selected in the 2K–3K range of Corpus of Contemporary American English (COCA) (32 verbs, 24 nouns, 8 adjectives) covering eight aspects of word knowledge. These included spelling based on hearing the spoken form, selecting collocations based on the written form, pronunciation based on the written form, selecting inflections based on the written context, selecting the definition based on hearing the spoken form, selecting the written definition based on the written form, selecting appropriate derivations based on the written form, and selecting the written form based on the written definition. ANOVA results show accuracy levels varied across word knowledge aspects and that implicational scaling was possible with some but not all aspects of word knowledge examined simultaneously. In aggregation with other current and future studies, this has important implication for developing L2 vocabulary acquisition theory.

*Keywords:* second language vocabulary acquisition, aspects of word knowledge, implicational scaling

For four decades, scholars have lamented the lack of a complete theory of second language vocabulary acquisition (e.g., Meara, 1983; Schmitt, 1995, 2019). Nevertheless, some incremental progress has been made. For instance, we now have valuable insights regarding vocabulary coverage needed for text comprehension (Laufer, 1989, 1992; Hu & Nation, 2000; Nation, 2006; Schmitt et al., 2011). Scholars such as Richards (1976) and Schmitt (1998) have also described various components of word knowledge and suggested that some

may be interrelated and that their acquisition may be incremental (Schmitt, 1998). More recently, González-Fernández and Schmitt (2020) have used implicational scaling to suggest an acquisition order for a number of aspects of word knowledge. This progress is promising for increasing vital insights about second language vocabulary acquisition. Nevertheless, more complementary and confirmatory data are needed from multiple streams of evidence across many contexts if we are to solidify our knowledge of how vocabulary is acquired and whether a durable acquisition order for various word knowledge components can be established (e.g., González-Fernández & Schmitt, 2020; Schmitt, 2019). Such insights would be invaluable for L2 teachers, materials developers, theorists, and researchers alike. Therefore, this study was designed to provide important contributions to the literature by identifying an accuracy order for second language learners on eight specific aspects of word knowledge in an ESL context.

## Review of Literature

A robust knowledge of vocabulary is fundamental to second language development and comprehension. In reading, for example, many scholars agree that comprehension requires mastery of approximately 95 to 98% of the words readers encounter (Laufer, 1989; Hu & Nation, 2000; Schmitt et al., 2011). Thus, vocabulary acquisition is an essential component in language development. Though at its most fundamental level, vocabulary acquisition requires knowledge of a word's "form" and "meaning" (Thornbury, 2002, p. 15), much more can be included in what it means to know a word. For example, Richards (1976), described word knowledge as including an understanding of the word's form, meaning, frequency, syntactic features, derivations, associations, and the various limitations on the use of the word.

In an effort to describe word knowledge, some researchers have examined vocabulary development in terms of breadth and depth (Chapelle, 1998; Qian & Schedl, 2004; Schmitt, 2014). The notion of word breadth or the number of words known is well correlated with efficacy in writing (Milton et al., 2010; Stæhr, 2008), and speaking (Zimmerman, 2004), as well as in higher levels of comprehension in listening (Stæhr, 2008; Zimmerman, 2004) and reading (Laufer, 1992; Qian, 1999; Stæhr, 2008).

Despite benefits associated with vocabulary breadth, determining the depth of one's vocabulary knowledge seems to be more difficult. The development of various instruments has been useful such as Wesche and Paribakht's (1996) Vocabulary Knowledge Scale, which identifies word familiarity by measuring

vocabulary recognition and production. Another helpful resource has been Read's (1998) Word Associates Format test which examines knowledge of paradigmatic and syntagmatic word associations (Zhang & Koda, 2017). In addition, research has examined the positive effects of vocabulary depth on various skills such as speaking (Koizumi, 2005; Kilic, 2019), listening (Farvardin & Valipouri, 2017; Teng, 2014), writing (Atai & Dabbagh, 2010; Kilic, 2019), and reading comprehension (Farvardin & Koosha, 2011; Mehrpour et al., 2011; Qian, 1999). Such studies highlight the importance of learners developing both vocabulary breadth and depth.

Nation (2001) has also suggested that a more complete understanding of vocabulary depth is needed. He described word knowledge as a word's form (including the spoken form, written form, and word parts), meaning (including connections between form and meaning, concepts and referents, and associations), and use (including grammatical functions, collocations, and various constraints on the use of a word). Thus, word knowledge could refer to an individual's facility with each of these nine elements. Yet, because aspects of word knowledge can be examined productively and receptively, Nation's nine components could be expanded to eighteen.

Despite these numerous aspects of word knowledge, however, specific attempts to operationalize data elicitation of word knowledge could further expand the number of contexts worth studying. For example, consider the various types of stimuli that might be used to prompt a learner to write a specific word. In the L2, learners might hear the word, one or more definitions, a derivation, or an inflection. Or, they might read a definition, a synonym, an antonym, a derivation, an inflection, and so forth. Conversely, they might encounter these or many other types of prompts in their L1. Alternatively, prompts may be much less direct, or language data may be based on completely natural production with no prompt at all. Although the specific task for the learner to write a particular word may be the same across settings, performance levels may vary widely depending on the exact nature of the stimuli, the context, and the learners themselves. This variability should be taken into account in vocabulary acquisition studies.

### **Relationships among Word Knowledge Components**

González-Fernández and Schmitt (2020) have noted that while most studies currently available have examined only one aspect of word knowledge at a time, this approach may be inadequate for developing a more complete understanding of vocabulary acquisition. Rather they "encourage the measurement of multiple components concurrently" (p. 483). A few studies have simultaneously examined a small number of word-knowledge components. For

example, in their research on the effects of lexical depth and breadth on reading comprehension, Qian (2002) examined synonymy, polysemy, and collocations. Pellicer-Sanchez and Schmitt (2010) examined word class, word recognition, spelling, and recall of meaning. Wesche and Paribakht (1996) developed the Vocabulary Knowledge Scale and had students describe their level of word knowledge in terms of word production and recognition.

Several scholars have undertaken studies designed to reveal key relationships among various aspects of word knowledge. For example, over the course of one year, Schmitt (1998) examined the development of four of these, including senses of meaning, spelling, associations, and grammatical features. Schmitt concluded that some of these aspects of word knowledge seemed to be related in their development. He noted that senses of meaning were more closely related to grammatical features and associations than grammar. Schmitt also observed that spelling was generally acquired before the other aspects of word knowledge. Despite these insights, Schmitt was unable to identify a valid implicational scale showing a developmental hierarchy across word knowledge components due to inconsistencies in his data.

Looking at both receptive and productive contexts, Webb (2005) examined five aspects of word knowledge including meaning, grammatical features, syntax, association, and orthography. He observed that strategies associated with productive skills generated more productive and receptive knowledge of orthography, meaning, syntax, and grammar but the strategies associated with receptive learning only produced more receptive knowledge of meaning. He advocated the use of instruments that measure both productive and receptive word-knowledge components. Later, when examining the effects of repetition, Webb (2007) noted that some aspects of word knowledge emerged before others. For example, receptive knowledge syntax, grammatical features, orthography, and productive knowledge of association emerged before meaning. Building on the work of Webb (2005, 2007), Chen and Truscott (2010) similarly observed language development for both receptive and productive aspects of word knowledge for orthography, part of speech, associations, and meaning and form, though they noted that the link between form and meaning took longer to be mastered compared to the other components.

Laufer and Goldstein (2004) examined four aspects of word knowledge including active recall where the learner produces the target word), passive recall where the learner provides the word's meaning, active recognition where the learner identifies the word from a list of options, and passive recognition where the learner identifies the meaning of the word from a list that includes distractors. As they hypothesized, accuracy levels for these tasks showed a clear difficulty order ranging from easiest to most difficult: passive recognition, active recognition, passive recall, and finally active recall.

With an emphasis on the acquisition order of various aspects of word knowledge, González-Fernández and Schmitt (2020) identified a valid implicational scale based on difficulty for these components in writing. From most accurate to least accurate, these include: (a) form-meaning recognition, (b) collocate form recognition, (c) multiple meaning recognition, (d) derivative form recognition, (e) collocate form recall, (f) form-meaning recall, (g) derivative form recall, and (h) multiple meaning recall. They concluded that the form-meaning link is more difficult than productive and receptive knowledge of orthography, part of speech, and associations. They also suggested that the form-meaning link is easier for learners to master than collocations, multiple meanings, and derivatives.

Though few studies have examined multiple aspects of word knowledge simultaneously, the work of González-Fernández and Schmitt (2020) provides important new insights with the generation of a valid implicational scale. Though cross-sectional rather than longitudinal, these findings suggest incremental development and a hierarchical order of the various aspects of word knowledge examined. Nevertheless, González-Fernández and Schmitt (2020) acknowledge that the construct of vocabulary knowledge is based on many more aspects than can possibly be examined effectively in one study and that many more studies are needed. They have suggested that “future studies should explore different combinations of components to build a composite picture of the overall word knowledge component constellation” (p. 501).

Scholars interested in answering this call to contribute should also consider the many valuable suggestions regarding this line of inquiry. One challenge has to do with “test contamination [...] where exposure to a target word on one test [...] may give hints to answering a subsequent test” (Schmitt, 2019, p. 263). A potential solution could be to utilize different words in different instruments rather than the same set of words across aspects of word knowledge (e.g., Kieffer & Lesaux 2012; Li & Kirby 2015; Milton & Hopkins 2006). González-Fernández and Schmitt (2020), who only used twenty words in their study, recommended that researchers use a larger sample of words and that researchers should include students from heterogeneous L1 backgrounds rather than a single L1 background.

Based on the preceding review, and in consideration of these important suggestions, the current study was designed to add to the literature by examining a complementary set of aspects of word knowledge. The aspects selected for this study were based on the literature as well as constraints inherent to our research context and include some of the most common tasks associated with what it means to know a word.

## Research Questions

As mentioned previously, testing various aspects of word knowledge in this study are operationalized as particular tasks based on specific prompts. These include: (a) spelling based on hearing the spoken form, (b) selecting collocations based on the written form, (c) pronunciation based on the written form, (d) selecting inflections based on the written context, (e) selecting the definition based on hearing the spoken form, (f) selecting the written definition based on the written form, (g) selecting appropriate derivations based on the written form, (h) selecting the written form based on the written definition. With these targeted aspects of word knowledge in mind, the following research questions are articulated:

1. To what extent does the accuracy of ESL learner performance vary across the specified eight aspects of word knowledge?
2. Do accuracy levels of ESL learner performance across the specified aspects of word knowledge form an implicational scale?

## Methods

This section describes the selection of the words used in this study, the development of the instrument, the learners who provided data for this study, and the planned analyses.

### Word Selection

Building on the recommendation of González-Fernández and Schmitt (2020) to use more than twenty words, a total of 64 words were selected to represent eight different aspects of word knowledge. These words were initially chosen randomly from between frequency rankings of 2K–3K in the Corpus of Contemporary American English (Davies, 2008). This frequency range was selected based on previous assessments that suggested that many of these words would be known by the advanced proficiency learners but not by the novice learners. It was expected that such a range in word knowledge would be necessary for implicational scaling. It was intended that a representative list of words from different parts of speech be used that could help answer the research questions associated with the different aspects of word knowledge of interest in this study. Some adjustments from the original randomized list were made to ensure that all words could have derivational and inflectional forms.

Adverbs were not used in this study since they do not undergo inflection in English. The final list included 32 verbs, 24 nouns, and eight adjectives (see Appendix A for the complete list).

## **Instrument Development**

This section details the creation of the data instrument used in this study. The instrument was developed as an electronic survey to be delivered to student email addresses during a class period in the IEP's computer lab with monitoring provided by the students' teachers and the researchers. As described above, the instrument was designed to test eight different aspects of word knowledge, using eight words to establish mastery for each aspect. Each of these item types will be described below.

At the outset, however, we begin with a brief description of the creation of the audio recordings used in this study. Two of the item types in the instrument required audio recordings of the words of interest. Audio recordings to be included were made using Adobe Audition CC 2019 and the built-in microphone in a 2019 MacBook Pro with the speaker's voice one and a half feet away from the microphone. Postproduction included reduction of ambient noise using the default setting of the DeNoise effect. Each recording was also normalized to 95%. Minor post-production editing resulted in the final recordings for each word beginning with 500 milliseconds of silence followed by a first audio presentation of the word of interest. This was followed by two seconds of silence and then a second production of the word. This was done for all 64 words and example recordings used to introduce item types that utilized audio. We now provide a brief description of each item type.

### ***Recognizing the Meaning from Hearing the Word***

The first item type in the instrument provided students with the audio and then invited them to choose the best definition of the word they heard by using their mouse to select the most appropriate response. Figure 1 illustrates this item type for the word "accuse." Students clicked on the play button to hear the audio and then selected the best definition from among five options. Distractor definitions were randomly selected from other words within the 2K–3K range. In the very few cases where the randomly selected definition shared a meaning sense with the target word, another definition was randomly chosen so there would be only one correct response. As shown in the figure, definitions were kept short and utilized high frequency vocabulary. This was done with the intent that incorrect responses would be based on not knowing the meaning of the word rather than challenges associated with reading or understanding the

options within the item. Each of the eight items of this type were simply scored as correct (1 point) or incorrect (0 points) depending on the answer.

**Figure 1***Sample Item for Recognizing a Written Definition Based on the Spoken Form*

1. Click on the play button (▶) to listen to the recording:



Choose the best definition of the word you hear.

To have or to own something

To help someone to learn something

To disagree with someone

To forgive someone

To say that someone is guilty

**Spelling the Word**

The second aspect of word knowledge tested student ability to spell a word based on hearing the word. The prompt for this item type was the same as the previous item in that students were presented with the audio in the same format. After clicking on the play button to initiate the audio, students were invited to type the word in a provided textbox as illustrated in Figure 2. Scoring was limited to the actual spelling of words without regard to capitalization. No attempt was made to give partial credit. This item type was scored with 1 point for each correctly spelled word, and no points for any misspelled words.

**Figure 2***Sample Item for Spelling the Word based on the Spoken Form*

9. Click on the play button (▶) to listen to the recording:



Type the word you hear in the space.

### ***Recognizing the Meaning from the Written Form***

The third item type in the elicitation instrument presented students with the written form of the word and then invited them to identify the best written definition of five possible options. As with previous items, definitions were randomly selected. They were also kept relatively short and utilized higher frequency vocabulary than the word being defined. Figure 3 provides a sample of this item type from the instrument. As with previous items, students were given one point for each correct answer and no points for any wrong answers.

#### **Figure 3**

#### ***Sample Item for Selecting the Definition Based on the Written Form***

17. Choose the best definition of the word "estimate."

To give a general idea about the value or cost of something

To support or argue for a policy or a cause

To change something in a skillful way for a specific purpose

To cause something to turn or move in a particular way

To write or say the exact words from a piece of writing or speech

### ***Recognizing the Word from a Written Definition***

The fourth item type in the instrument was the inverse of the previous item. Students were presented with a simple definition and invited to select the word that was the best match for the definition. As with previous item types, words were randomly selected from within the 2K–3K frequency band. Figure 4 provides an example of this item type. As with previous tasks, students were awarded one point for each correct response and no points for incorrect answers.

**Figure 4***Sample Item for Selecting the Written Word Based on the Written Definition*

28. Choose the word that matches the definition "to split into equal parts or groups."

Exhibit
Enforce
Divide
Shout
Spin

***Recognizing Appropriate Inflections***

The fifth item type was designed to test learner knowledge of word inflection. Students were provided with the uninflected word of interest and a sentence requiring an inflected form of the word. Students chose from among five options. Distractors were formed by adding inflectional morphemes common in English but that were not appropriate for the context. Figure 5 illustrates this item type from the instrument for the word "expose." Correct answers were given one point and incorrect answers with given no points.

**Figure 5***Sample Item for Selecting the Written Word Based on the Written Definition*

33. Use the right form of the word "expose" in the following sentence.

You \_\_\_\_\_ yourself to too much sunlight; now you have sunburn.

exposing
exposen
exposed
exposes
exposer

## ***Collocations***

The next item type was designed to test learner knowledge of collocations for each word of interest. The collocations used in our instrument were based on information provided in the frequency dictionary by Davies and Gardner (2010). Our intent was to choose three of the most common collocations for each word included in the instrument. Figure 6 provides a sample item from the instrument where “people,” “jury,” and “try” are common collocations for the word “convince” (Davies & Gardner, 2010, p. 121). We note that “people” and “jury” were the first two collocations listed in the dictionary under the noun category and that “try” was the first entry under the miscellaneous category. Though this entry for “convince” only included a noun and miscellaneous categories, other entries included additional categories. For example, the word “pepper” in the dictionary includes the adjectives (“red, black, green, hot...”), nouns (“salt, teaspoon, bell...”), and verbs (taste, add, chop, dice...). In such cases, we generally went with the first word from each category such that the correct response for “pepper” would be “red, salt, taste.” Responses were scored with one point for correct answers and no points for incorrect answers.

**Figure 6**

*Sample Item for Selecting Collocations Based on the Written Form*

41. Which set of words most often occurs with the word "convince"?

People, jury, try

Sport, coach, play

Program, policy, offer

Salt, teaspoon, taste

Hand, car, turn

## ***Derivations***

This item type was designed to test learner knowledge of derivations of the target words emphasized in the instrument. Learners were presented with the word and then invited to choose which of the five options was an actual word in English based on the written form of the word of interest. Distractors were

generated by using nonwords that were morphologically related to the word and were designed to appear as the same part of speech. Figure 7 illustrates this item type for the word “employ.” As with other items, one point was given for each correct response.

**Figure 7**

*Sample Item for Selecting an Appropriate Derivation Based on the Written Form*

52. Which of the following is an English word related to “employ”?

Employity

Employment

Employness

Employage

Employery

***Oral Production Based on Written Form***

The final item type was designed to test the learner’s ability to appropriately pronounce the word in context. In this case, one of the target words was situated in one of eight sentences presented to the learner for them to read aloud while being recorded. As with previous items, care was given to keep the sentences relatively short and to ensure that the other included words were of higher frequency than the word of interest. Though short, complete sentences were used to help differentiate polysemous forms such as “suspect” (in the second sentence below) which could be interpreted as a noun or a verb with different phonological forms without the context provided by the sentence. The software used to record learner voices was proprietary and had been installed on the computers in the lab where data were collected. One point was given for each correctly pronounced word. However, scoring for this item type was more complicated due to the need to establish inter-rater reliability estimates which will subsequently be described in more detail. This item type is displayed in Figure 8.

**Figure 8***Sample Item for Oral Production of a Word Based on the Written Form*

Say each of these sentences:

1. I pray every day.
2. I suspect he is the thief.
3. I love reading that column.
4. He doesn't oppose them.
5. Nobody solved the mystery.
6. We will transform our kitchen.
7. It is a rare bird.
8. He is a champion.

As described previously, the elicitation instrument included eight words for each of the eight item types for a total of 64 words. However, since the questions for certain aspects of word knowledge could give away the answers for other aspects of word knowledge, the instrument had to be carefully constructed. For example, hearing the spoken form of the word for one item testing one component of word knowledge could alert the learners how to pronounce the same word for an item testing a different component of word knowledge. To avoid this problem, eight different test forms were created. This allowed testing that included all 64 words used for the eight different components of word knowledge but that did not use the same words across forms to elicit data on the same aspect.

For example, consider Table 1 that illustrates the distribution of just eight words (represented by letters A–H) across the eight different aspects and eight different test forms. Let's say the letter "A" represents the word "accuse." In Form 1 of the instrument, the word "accuse" is used to test the first aspect of word knowledge. Therefore, the student hears the word "accuse" and selects the best definition. In Form 2 of the instrument, however, the word "accuse" is used to test the second aspect of word knowledge. So, the student hears the word and types the word "accuse" in the space provided. Thus, in summary, all students were tested on all eight aspects of word knowledge using the same 64 words, though not all students were presented with the same words for the same aspects across the eight different test forms.

**Table 1***Distribution of Words Across Aspects and Test Forms*

Aspect	Test Forms							
	1	2	3	4	5	6	7	8
1	<b>A</b>	H	G	F	E	D	C	B
2	B	<b>A</b>	H	G	F	E	D	C
3	C	B	<b>A</b>	H	G	F	E	D
4	D	C	B	<b>A</b>	H	G	F	E
5	E	D	C	B	<b>A</b>	H	G	F
6	F	E	D	C	B	<b>A</b>	H	G
7	G	F	E	D	C	B	<b>A</b>	H
8	H	G	F	E	D	C	B	<b>A</b>

Though we acknowledge this is an imperfect data elicitation solution since the respective forms are not exactly the same, we believed that in aggregate, this approach would prevent the elicitation instrument from inappropriately revealing additional word information to the participants. We also believed that the potential benefits associated with new insights from this strategy likely outweighed the potential limitations of this approach. Also, since it is conceivable that the ordering of particular aspects of word knowledge could impact learner performance, the order of these different item types were presented randomly within the different forms of the elicitation instrument.

## Participants

This study was sponsored by the intensive English program where the study occurred with the express intent that results could help inform materials development and pedagogy. Accordingly, all ethics standards were met in the gathering of these data. Unfortunately, due to the COVID-19 pandemic, student enrollment in the program was less than half its typical number. Thus, only 110 students provided data for all eight of the aspects of word knowledge examine in this study. Of the participating students, there were 58 females and 52 males. Participant ages ranged from 18 to 57 though most students were in their twenties ( $M = 24.37$ ;  $SD = 6.29$ ). Although about two-thirds of the students were native speakers of Spanish (73), other L1s included Japanese (16), Portuguese (6), Chinese (4), French (3), Haitian Creole (3), Korean (2), Russian (2), and Albanian (1). Proficiency levels ranged from novice high to advanced low according to guidelines from ACTFL (*American Council on the Teaching of Foreign Languages*, 2012) as illustrated in Table 2.

**Table 2**  
*Proficiency Levels of Student Participants*

Proficiency	<i>N</i>	%
Advanced Low	20	18.18
Intermediate High	30	27.27
Intermediate Mid	40	36.36
Intermediate Low	14	12.73
Novice High	6	5.45
Total	110	100.00

### ***Raters***

Though most data examined in this study did not require a reliability estimate, the interrater reliability for oral production of the words was established by the two authors, one of whom holds a Ph.D. and who has worked in the field of second language teaching and learning for more than three decades. The other holds an MA in TESOL and has taught EFL/ESL for about seven years.

### ***Analyses***

Interrater reliability for oral production of the words examined in this study was established by the authors based on two broad categories. The first was the phonological appropriateness of the production, and the second was the appropriate stress accent based on the word in a simple sentence. Though the raters agreed that some latitude would be allowed for slight departures from phonological norms, any overtly conspicuous phonological substitution of consonants or vowels would be considered an error. Similarly, any obvious departures from stress accent norms would also be considered an error. Raters only evaluated the specific words targeted for the study, so any additional departures from pronunciation norms within the sentences were ignored. Rating involved evaluating each of the eight words used to test oral production, resulting in a rating deemed correct (1) or incorrect (0) for each word. Thus, raters provided each student with a raw score ranging from 0 to 8. In six cases, recordings for one or more of the words were unexpectedly cut short. Rather than completely discard data from these students, the missing data were replaced with mean performance levels for the items for which recordings were available.

While one researcher provided a rating for each student included in the study, the other randomly rated 70% of the group. This initially produced a Pearson correlation of .85 ( $p < .001$ ). However, examination of the data revealed four

cases with a rating difference of two or more. Without discussing any details about these cases, raters were invited to reexamine these recordings to ensure no clerical mistakes or other oversights had produced the discrepant scores in error. After reexamination, some corrections to these cases were made, with a resulting Pearson correlation of .92 ( $p < .001$ ). In an effort to leverage the perceptions from both raters, averages were calculated for those students with two ratings. Subsequent analyses were based on these scores.

The intent was that each test form functions similarly for each aspect of word knowledge. Test forms were randomly assigned within each proficiency level. Though not all students completed the test, the number of students taking each test form and their respective proficiency levels were fairly well distributed, with no statistically significant difference across performance levels for the test forms themselves,  $F(7,102) = .089$ ,  $p < .999$  (see Table 3).

**Table 3**  
*Descriptive Statistics and Proficiency Level by Test Form*

Form	Proficiency Level					Descriptives		
	NH	IL	IM	IH	AL	<i>N</i>	<i>M</i>	<i>SD</i>
1	1	2	6	4	2	15	335	110
2	1	2	5	4	2	14	337	114
3	0	3	4	4	2	13	344	104
4	0	3	4	4	3	14	355	108
5	1	1	4	3	3	12	356	123
6	1	1	6	4	2	14	344	107
7	1	1	6	3	3	14	351	114
8	1	1	5	4	3	14	358	114
Total	6	14	40	30	20	110		

Moreover, no significant difference was observed for performance levels across test forms for five of the eight aspects of word knowledge including spelling based on hearing the spoken form,  $F(7,102) = 0.49$ ,  $p = .84$ , selecting the inflection based on the written context,  $F(7,102) = .519$ ,  $p = .819$ , pronouncing the word based on the written form,  $F(7,102) = .577$ ,  $p = .773$ , selecting the definition based on hearing the spoken form,  $F(7,102) = .667$ ,  $p = .691$ , and selecting the derivation based on the written form,  $F(7,102) = 1.708$ ,  $p = .115$ . However, the original performance levels for three of the aspects of word knowledge were not uniform across test forms including selecting the written form based on the written definition,  $F(7,102) = 2.307$ ,  $p = .032$ , selecting the collocations based on the written form of the word,  $F(7,102) = 3.726$ ,  $p = .001$ , and selecting the written definition based on the written form of the word,  $F(7,102) = 4.945$ ,  $p < .001$ . Given these discrepancies, test form effect was accounted for and eliminated in subsequent analyses.

Implicational scaling was used to address the second research question (e.g., Hakansson, 2013; Hatch & Lazaraton, 1991; Rickford, 2002). Implicational scaling can be used to show which aspects of word knowledge may be the easiest or most difficult for learners to master. If an accuracy order is scalable, it may suggest an acquisition order. Implicational scaling has been widely used for hierarchical ordering of “grammatical, lexical, and phonological features of language” (Hatch & Lazaraton, 1991, p. 204) with important applications for teaching and second language materials development. For this study, the accuracy threshold for each aspect of word knowledge was set at 75%. Though this threshold is on the lower end of the acceptable range, typically between 75–90% accuracy (e.g., Dulay & Burt, 1974; Ellis, 1988), this level was chosen with the hope it might help mute error levels that might be introduced by using different test forms. Since the use of longitudinal data were not feasible for this study, implicational scaling was based on cross-sectional accuracy data gathered on a single occasion.

Before presenting the findings designed to answer our research questions, we briefly examine student responses in greater detail. Items used for elicitation were of three types. These include several multiple-choice formats as well as the spelling and spoken production of specified words. Figure 9 shows the distribution of responses for one multiple choice item type seeking the best definition of the word *accuse*. This illustrates the typical pattern with most students responding correctly while others chose various distractors. For additional examples of multiple-choice responses, see Appendix B.

**Figure 9**

*Example of Response Distributions*

**Select written definition based on written form**

Prompt: Choose the best definition of the word “accuse.”

To say that someone is guilty	<b>Correct Response</b>	60.00%
To have or to own something		13.33%
To disagree with someone		13.33%
To help some to learn something		6.67%
To feel disappointed		6.67%

Perhaps more informative than the multiple-choice items, however, are the variety of productive responses of spelling and pronunciation. Though extensive analysis of these errors is beyond the scope of this work, a few examples and comments about errors may be useful. In spoken production, some errors were phonologically similar English words though not those elicited such as *poor* for *pure*, *pose* for *oppose*, *rear* for *rare*, *pry* for *pray*, *concrete* and *complete* for *compete*, and so forth. In some cases, students substituted one or more erred phonemes such as /'bæʃən/ for *passion*, /tɹænz'fɔrn/ for *transform*, and /'tʃɑ:ɪp/

for *sharp*. In other cases, students altered or omitted one or more phoneme such as /səs'pet/ for *suspect*, /'mɪsɪri/ for *mystery*, and /kən'vaɪz/ for *convince*, and /'æksə/ for *access*. Still in other cases, productions shared only vague similarities with the elicited words such as /'fi:t/ for *thief*.

In terms of spelling, just four of the sixty-four words included in the study were spelled correctly by all participants including *mix*, *invest*, *suspect*, and *emotion*. Words which generated five or more misspellings are presented alphabetically in Table 4. Similar to some pronunciation errors, some words or phrases were spelled correctly but were not those elicited by the prompts. These include errors such as *a quarter* for *acquire*, *quiz* for *accuse*, *uplift* for *athlete*, *belief* and *breath* for *brief*, *complete* for *compete*, *device* for *divide*, *ask to me* for *estimate*, *mistreat* for *mystery*, *vacation* for *occasion*, *orange* for *origin*, *poor* for *pure*, and *strait* and *stretch* for *straight*. Possibly due to limitations in working memory, some students also produced errors by inappropriately inflecting target words such as *attracted* for *attract*, *employed* for *employ*, and *opposed* for *oppose*.

Other error types seem consistent with predictions from the orthographic depth hypothesis which suggests greater difficulties where orthographies such as English are not well aligned with phonology (Frost, 2005). Many students attempted to use a single letter to represent phonemes spelled with two letters in English. These include misspellings such as *acomplish* for *accomplish*, *acuse* for *accuse*, *aprove* for *approve*, *atract* for *attract*, *colum* for *column*, *ocasion* for *occasion*, *pasion* for *passion*, and so forth. Similarly, other mistakes may have been associated with multiple letters or word formation patterns in English that represent the same or similar sounds, resulting in constructions such as *mistery* for *mystery*, *filozofi* and *phylosofy* for *philosophy*, *strait* and *strate* for *straight*, *breaf* and *breef* for *brief*, *welth* for *wealth*, and so on. Additional research may be needed to better understand these spelling error patterns more fully.

**Table 4**  
*Words with Five or More Misspellings*

Word	Misspellings
Accomplish	acmplish, acomplesh (2), accomplish (5), acoplish
Accuse	acuse (9), quiz
Acquire	a quarter, aquair, aquaire (2), aquare, aquareir, aquarer
Approve	aprofe, aprouve, aprove (6)
Athlete	afflide, aflate, afleed (2), afflict, aflied, aflix, afraid, afread, afrid (2), uplift
Attract	atrack, atracked, attract (3), attracted, attractt, attarct
Brief	belief, breaf (2), breath, breef, brive (2)
Column	calam, colam, colom (3), colon (3), colonne, colum, coron

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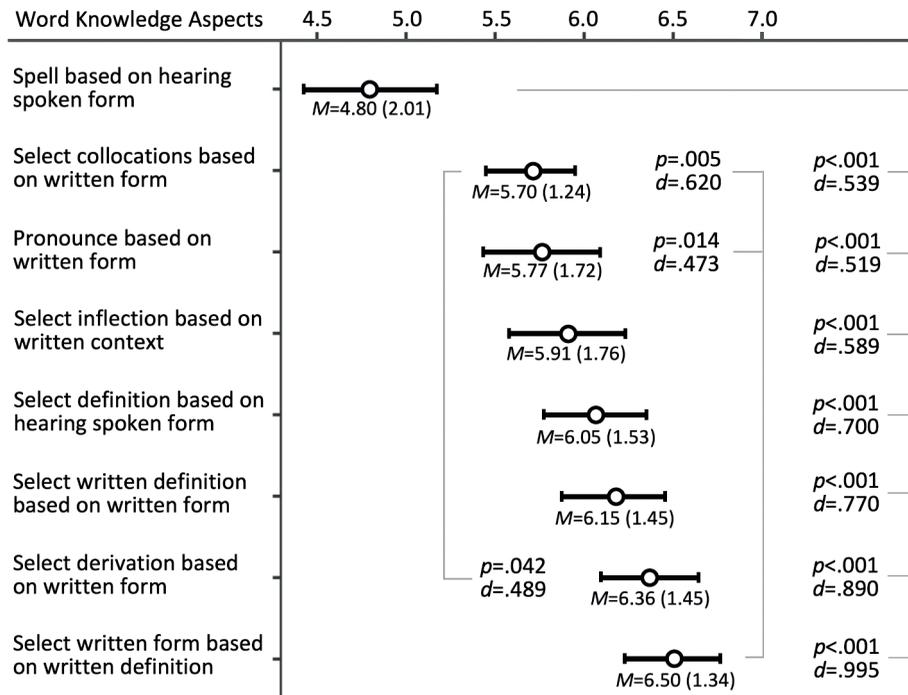
Compete	compet, competa, compite (6), complete
Convince	convence (3), convens, convience
Divide	devaed, device, devid, devide (5), duvaret
Emphasize	emphazise, emphese, emphsize, enfacides, enfasis, enphase, inphasize
Employ	employe (2), employed (3), imploe, impory, improal
Estimate	ask to me, astomate, attrac, estimate, estmit, stament, stimate
Fiction	ficcion, ficion, fittion, fitshen, fixation
Mystery	mistry, mystery (6), mistread, mistreat
Occasion	acation, ackigan, ocasion (2), ocassion, ocaction (3), occation, vacation
Oppose	apos, apous, appose, appouse, opositive, opositive, opouse, opposed
Origin	orange (2), orgen, origaine, origen (3), origine
Passion	pacient, pacient, partsion, pasion (2), pation
Permit	permet, permite, premitted, promed, promet (2)
Philosophy	filosophy (2), filozofi, forasefi, forasefy, phirosify, phylosofy, phylosophy
Pure	pior poor, priort, puler, puor, pur
Scholar	schollar, scholar, schoolar (3), schooler, (3) scoger, scolar, skoler
Smooth	slud, smode, smooded, smoose, smoth
Straight	schoolar, straght, strait (2), straith, strate, streat, streid, strenge, stretch
Symbol	sambal, sembal, simbol, simbole (3), symbole
Wealth	walth, weld, welf (3), welft, welth (2)

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*Note:* Parentheticals indicate the number of observations of the same spelling.

## Results

This section presents findings associated with the two research questions. The first question addressed the extent to which the accuracy of ESL learner performance varied across the eight aspects of word knowledge examined in this study. Results of a one-way ANOVA indicated that performance levels indeed varied across aspects of word knowledge,  $F(7,872) = 12.1$ ,  $p < .001$ , and a Tukey post-hoc test showed statistically significant differences between specific aspects of word knowledge. Figure 10 illustrates these differences, presenting means, standard deviations (in parentheses),  $p$ -values, and effect sizes. Performance on these aspects of word knowledge were based on a possible range of 0 to 8 and are arranged from least accurate at the top of the figure to most accurate at the bottom of the figure.

**Figure 10***Mean Accuracy Levels across Aspects of Word Knowledge*

The second research question addressed whether ESL learner performance across aspects of word knowledge form an implicational scale such that mastery of one aspect would suggest mastery of one or more other aspects. Though the findings illustrated in Figure 10 provide general evidence that the ESL performance levels varied across components of word knowledge, an implicational scale could not be formed utilizing all eight components of word knowledge simultaneously. Nevertheless, implicational scaling was successful with some subsets of the total list.

For instance, implicational scaling was achieved<sup>1</sup> with the following aspects of word knowledge: being able to spell a word based on hearing the spoken form  $\subset$  being able to pronounce the word based on the written form  $\subset$  being able to recognize the written form based on the written definition. In other words, these data suggest that accurate spelling implies the ability to pronounce the word, and accurate pronunciation implies the ability to identify the written form based on the definition (Crep = .927; MMrep = .333; %Imp = .5937; Cscal = .89).

<sup>1</sup> In order to claim scalability, usually the coefficient of reproducibility (Crep) must be  $\geq .90$  and the coefficient of scalability (Cscal) must be  $\geq .60$  (Guttman, 1944).

Similarly, the following slightly varied list was also scalable: being able to spell a word based on hearing the spoken form  $\subset$  being able to select appropriate inflections based on the written form of the word  $\subset$  being able to recognize the written form based on the written definition (Crep = .939; MMrep = .333; %Imp = .606; Cscal = .909).

Other potential scales were also observed though they merely approached but did not meet the traditional expectation of .90 for the coefficient of reproducibility. Here are three of these. The first includes being able to spell a word based on hearing the spoken form  $\subset$  being able to pronounce the word based on the written form  $\subset$  being able to select a definition of the word based on hearing it  $\subset$  being able to recognize a definition of the word based on reading the written form  $\subset$  being able to recognize the written form based on the written definition (Crep = .866; MMrep = .351; %Imp = .515; Cscal = .793). The second includes being able to spell a word based on hearing the spoken form  $\subset$  being able to select an appropriate inflection based on the written form  $\subset$  being able to select an appropriate derivation based on the written form  $\subset$  being able to select an appropriate definition based on reading the word  $\subset$  being able to select the written form based on the written definition (Crep = .85; MMrep = .333; %Imp = .594; Cscal = .89). The third includes being able to spell a word based on hearing the spoken form  $\subset$  being able to select an appropriate inflection based on the written form  $\subset$  being able to select a definition based on reading the word  $\subset$  being able to select the written form based on the written definition (Crep = .886; MMrep = .334; %Imp = .555; Cscal = .83).

## Discussion

Building on the work of other scholars including González-Fernández and Schmitt (2020) and employing some innovations in data elicitation, this study sought to examine the extent to which accuracy of ESL learner performance varied across eight aspects of word knowledge and whether ESL learner performance levels would form an implicational scale. Data for this study were elicited through the presentation of certain tasks based on specific types of prompts or stimuli. Though a valid implicational scale could not be formed for all eight aspects of word knowledge examined simultaneously in this cross-sectional study, analysis of variance and implicational scaling of subsets of the complete list of aspects of word knowledge revealed meaningful differences in accuracy levels across components of word knowledge. Thus, these findings may be useful in aggregate with other current and future studies in providing important insight about vocabulary acquisition.

For the eight aspects of word knowledge included in this study, spelling—based on hearing the word—proved to be the most difficult for learners on average. The accuracy levels for spelling were significantly lower than every other aspect of word knowledge observed in this study. The next most difficult feature for learners in this study after spelling was knowledge of collocations. Collocations were significantly more difficult for learners compared to selecting a derivation based on the written form or selecting the written form based on the written definition. The third most difficult aspect of word knowledge was pronunciation of the word based on the written form, which was significantly less accurate compared to selecting the written form based on the definition. Thus, the two item types requiring demonstration of productive skill ended up in the cluster of the three most difficult aspects of word knowledge. Despite clear differences in learner performance levels for these components of word knowledge illustrated in Figure 10, no other differences were observed in performance levels across the other aspects of word knowledge.

At a broad level, such findings showing varied performance levels across aspects of word knowledge are consistent with the studies of other researchers such as Laufer and Goldstein (2004), Webb (2005, 2007), and González-Fernández and Schmitt (2020). Generally, the pattern observed in this study showed that active recall was more difficult than passive recognition consistent with Laufer and Goldstein (2004) and González-Fernández and Schmitt (2020) and that demonstrations of productive knowledge was more difficult than receptive knowledge consistent with Webb (2005, 2007).

Thus, whilst general observations in this study associated with productive and receptive knowledge, recall and recognition, seem consistent with previous research, some discrepancies remain that warrant further study. Noting inconsistencies in previous research, González-Fernández and Schmitt (2020) question “whether all the recall aspects are more difficult than all recognition aspects,” as they observed in their study, “or whether some recall aspects can be easier than some recognition aspects” (p. 497). In their earlier research, Pigada and Schmitt (2006) observed that students performed more accurately on the recall component of spelling than they did with the recognition component of grammar knowledge. However, Pellicer-Sanchez and Schmitt (2010) observed that the recall components of word class and meaning were more difficult compared to the recognition components of meaning and spelling.

Though it might be expected that demonstrating productive knowledge would be more difficult than demonstrating receptive knowledge, in the current study, passive recognition of collocations was clustered closely with the most difficult active recall items of spelling and pronunciation based on hearing and reading the words respectively. This is of particular interest since the collocation items used for elicitation included three examples of collocates rather than just one. Moreover, unlike the current study, González-Fernández and Schmitt

(2020) found that recognition of collocates was the second most accurate item type of the eight aspects of word knowledge examined in their data. Though González-Fernández and Schmitt (2020) observed learner performance with recognition of collocates to be more accurate than performance with derivations, in the current study, learner performance with derivations was more accurate than with collocations.

Of course, a wide array of possibilities could account for these inconsistencies including different students learning in different contexts as well as the precise nature and differences of the instruments and elicitation processes. Since not all aspects of word knowledge can be studied at one time, our position is that many more studies need to be undertaken across as many components of word knowledge as possible. Then findings need to be aggregated to provide a general picture of the entire landscape. Though many scholars have aptly called for consistency in the ways in which vocabulary-based data are elicited to ensure comparability across studies, it is also important to note that there are many different types of data elicitation for a single aspect of word knowledge—each of which may be equally warranted for study. Thus, perhaps some focus needs to shift from simply labeling an aspect of word knowledge by the overarching terms such as definition, derivation, collocation, and so forth to a careful description of the specific elicitation contexts that includes the nature of the stimuli and the task. We may find that there may be many different ways to test particular aspects of word knowledge, each of which may occupy a different position in an implicational scale.

## Teaching and Learning

The findings of this study coupled with previous research suggest a number of implications for L2 vocabulary development. First, it is imperative that practitioners and students understand the importance of vocabulary acquisition to L2 development and the unique challenges associated with L2 vocabulary acquisition (Barclay & Shmitt, 2019). Nation (1993) appropriately described the need for L2 learners to experience a flood of new vocabulary, particularly at lower proficiency levels. Moreover, practitioners and learners must understand which English vocabulary will be most important for their specific context. All who are learning English will benefit immensely from mastering the most frequent one thousand word families, which should provide more than 80% coverage of common texts (Nation, 2006).

While continuing to work toward mastery of the next few thousand most frequent word families, all learners are likely to benefit from learning academic vocabulary that is foundational to all disciplines such as found in the Academic Vocabulary List (Gardner & Davies, 2014). The organization

of this list is based on lemmas and includes part of speech, reducing many challenges associated with polysemy. At higher proficiencies, if learners have begun studying within specific disciplines, it may also be helpful for them to begin learning vocabulary from specialized lists of technical terms in fields such as business (Konstantakis, 2007), chemistry (Valipouri & Nassaji, 2013), engineering (Gustafsson & Malstrom, 2013), medicine (Wang, Liang, & Ge, 2008), and so on.

Since no single endeavor will provide all of the vocabulary development L2 learners need, Grabe (2009) has suggested that vocabulary learning must be advanced from multiple approaches simultaneously such as providing direct instruction to raise student awareness, helping students to apply effective vocabulary-learning strategies including using vocabulary notebooks or flashcards for ongoing review, learning new words through extensive reading, and ensuring students experience multiple encounters and ongoing recycling of new words. Once a robust effort toward vocabulary development is underway, findings from this and other studies suggest that students may benefit from learning experiences that initially emphasize receptive vocabulary knowledge and then move toward production such as pronunciation and spelling (also see Schmitt, 2019).

Vocabulary development is incremental over time (Barclay & Schmitt, 2019) and eventually learners should develop a deep understanding that includes knowledge of orthography, morphology, pronunciation, meanings, inflections, derivations, collocations, register, and so on. Nevertheless, in the short-term, particularly at lower proficiencies, effort should be made to minimize cognitive load on the learner while seeking to optimize vocabulary acquisition. Though perhaps counterintuitive for some, initially, this might take the form of learning more words (breadth) with fewer word-knowledge components rather than fewer words with more word-knowledge components (depth). This also might take the form of using L1 definitions, particularly at lower proficiency levels, to minimize cognitive load and expedite the speed and efficacy of vocabulary learning (e.g., Grace, 1998; Laufer & Shmueli, 1997; Nations, 1982). Many other efforts made by practitioners may support the vocabulary development of their students such as nurturing student motivation for vocabulary study and helping students to implement the most effective vocabulary review regimens (e.g., Barclay & Schmitt, 2019).

## **Limitations and Future Research**

As with all research, limitations should be considered in the interpretation of these findings and in preparation for future research. First, though data were elicited from a substantial number of learners (110), this was about half the number of participants planned for this study. It is possible that a larger sample

of learners might have revealed greater differentiation of the relative difficulty of the aspects of word knowledge in the ANOVA and implicational scaling. Similarly, though the rationale for limiting word selection to the 2–3K range was to ensure that the different test forms functioned as similarly as possible, this range may have been too narrow for the smaller number of participants and may have adversely impacted the results. If large numbers of participants are not available, extending the frequency range of vocabulary studied might better reveal accuracy differences across word-knowledge components.

## Conclusion

Building on the previous work of other scholars, this study used an innovative approach to creating an instrument designed to identify differential performance levels of ESL learners on eight aspects of word knowledge. Results showed performance levels varied across word-knowledge components and that implicational scaling was possible with some but not all aspects of word knowledge examined simultaneously. This study contributes to our understanding of important characteristics of vocabulary acquisition when examined in aggregate with other studies. Nevertheless, more research is needed to help clarify inconsistencies among studies. We believe that rather than limiting future research to traditional views of word-knowledge components, researchers should pursue the many different stimuli and tasks that could target a single aspect of word knowledge, thus greatly expanding our developing understanding leading toward a more complete theory of L2 vocabulary acquisition.

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K. James Hartshorn, Aylin Surer

## **Zum Verständnis des Erwerbs von acht Aspekten der Vokabelkenntnisse**

### **Zusammenfassung**

Im Rahmen der vorliegenden Studie wurden auf Genauigkeit bezogene Daten von 110 ESL-Lernern erhoben – von der höheren Grundstufe bis zur niedrigen Oberstufe – mit der Absicht, einen Beitrag zu einer umfassenderen Theorie des Wortschatzerwerbs in der Zweitsprache zu leisten. Sie beziehen sich auf insgesamt 64 Vokabeln, die stichprobenartig aus der 2k-3k-Liste von COCA ausgewählt worden sind (32 Verben, 24 Substantive, 8 Adjektive) und acht Aspekte der Vokabelkenntnisse abdecken. Dazu gehören: die Rechtschreibung auf Grundlage der gehörten gesprochenen Form, die Wahl der Kollokationen auf Grundlage der geschriebenen Form, die Aussprache auf Grundlage der geschriebenen Form, die Wahl der Flexionsformen auf Grundlage des geschriebenen Kontextes, die Wahl der Definition auf Grundlage der gehörten gesprochenen Form, die Wahl der schriftlichen Definition auf Grundlage der geschriebenen Form, die Wahl entsprechender Ableitungen auf Grundlage der geschriebenen Form und die Wahl der geschriebenen Form auf Grundlage der schriftlichen Definition. Die ANOVA-Ergebnisse zeigen, dass das Genauigkeitsniveau bei verschiedenen Aspekten der Vokabelkenntnisse variiert sowie dass bei einigen, jedoch nicht bei allen simultan untersuchten Aspekten der Vokabelkenntnisse eine implizierende Skalierung möglich ist. In Zusammenhang mit anderen aktuellen und künftigen Studien bietet dies wichtige Schlussfolgerungen für die Entwicklung der Theorie des L2-Wortschatzerwerbs.

*Schlüsselwörter:* Wortschatzerwerb in der Zweitsprache, Aspekte des Wortwissens, implizierende Skalierung

**Words used in Data Elicitation Instrument (with frequency ranking)**

1. accuse (2004)
2. mix (2091)
3. athlete (2169)
4. recover (2298)
5. philosophy (2345)
6. evaluate (2357)
7. wise (3046)
8. republic (2506)
9. question (2034)
10. approve (2098)
11. instrument (2112)
12. acquire (2331)
13. wealth (2351)
14. graduate (2407)
15. smooth (2903)
16. occasion (2530)
17. estimate (2042)
18. inspire (2118)
19. experiment (2011)
20. attract (2200)
21. academy (2474)
22. emphasize (2415)
23. rough (2847)
24. finance (2864)
25. invest (2048)
26. separate (2119)
27. revolution (2176)
28. divide (2239)
29. scholar (2493)
30. accomplish (2423)
31. straight (2434)
32. fiction (2607)
33. expose (2054)
34. reject (2128)
35. emotion (2178)
36. disagree (2261)
37. prince (2502)
38. adjust (2464)
39. brief (2463)
40. drama (2679)
41. convince (2056)
42. account (2147)
43. expense (2240)
44. compete (2291)
45. exception (2387)
46. assist (2467)
47. sharp (2408)
48. symbol (2780)
49. guide (2064)
50. assess (2157)
51. therapy (2303)
52. employ (2173)
53. passion (2388)
54. permit (2470)
55. pure (2391)
56. origin (2575)
57. pray (2070)
58. suspect (2165)
59. column (2315)
60. oppose (2192)
61. mystery (2398)
62. transform (2489)
63. rare (2015)
64. champion (2865)

## Additional Examples of Student Responses to Multiple-Choice Items

### Select written form based on written definition

Prompt: Choose the word that matches the definition "a large amount of money or things someone has."

Wealth		<b>Correct Response</b> 57.14%
Agency		14.29%
Exhibition		14.29%
Advice		7.14%
Trip		7.14%

### Select inflection based on written context

Use the right form of the word "symbol" in the following sentence. The \_\_\_\_\_ meaning changes between cultures.

Symbol's		<b>Correct Response</b> 64.71%
Symbols		17.65%
Symboled		5.88%
Symboler		5.88%
Symboling		5.88%

### Select derivation based on written form

Prompt: Which of the following is an English word related to "question"?

Questionnaire		<b>Correct Response</b> 50.00%
Questionance		18.75%
Questionor		12.50%
Questionism		12.50%
Qustionment		6.25%

### Select collocations based on written form

Prompt: which set of words most often occurs with the word "separate"?

Parent, two, from		<b>Correct Response</b> 53.33%
Example, study, as		13.33%
Change, effect, for		13.33%
Score, age, between		13.33%
Hand, head, up		6.67%

### Select definition based on hearing spoken form

Prompt: Click on the play button to listen to the recording: Choose the best definition of the word you hear.

To decide the quality or importance of something		<b>Correct Response</b> 46.67%
To refuse to admit something		20.00%
To work together for a specific goal		13.33%
To give someone a job or a role		13.33%
To recommend something as an alternative		6.67%





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## The Impact of Orthographic Transparency and Typology on L2 Learner Perceptions

### Abstract

While there is substantial research on literacy in the L1, factors impacting literacy in the L2 remain understudied. Preliminary research indicates that orthographic accuracy and typology influence literacy acquisition, indicating these aspects of linguistic representation need further exploration within the context of second-language acquisition (SLA). Additionally, SLA research on individual learner differences highlights emotional factors such as attitude and motivation, which are widely considered critical indicators of L2 success. Motivation is closely linked to perceptions towards the L2, which indicates learner perceptions of L2 literacy could impact success in learning to read and write. As such, this paper presents a cross-lingual, mixed-methods study that compares the orthographic transparency and typologies of 26 languages against learners' ( $n = 217$ ) perceptions of L2 literacy acquisition, such as perceived difficulty of the orthography and a self-assessment of literacy skills. Results indicated that orthographic transparency has a greater impact on learners' perceptions compared to typology alone.

*Keywords:* phonology, orthography, L2 literacy, literacy acquisition, learner perceptions, grapholinguistics

Language is multifaceted and comprised of many interdependent systems, with phonology as one of the central pillars. As such, all other aspects of a language are inexplicably tied to phonological inventory and processes, including literacy. Research shows that phonological awareness results in higher levels of reading and improved literacy development in the L1 (e.g., Torgesen, 1999) and stronger phonological awareness and phonological working memory are associated with improved encoding of lexemes and literacy in the L2 (Lau & Rickard Liow, 2005; Meschyan & Hernandez, 2004). However, L2 literacy acquisition is still a relatively understudied subfield in second language acquisition.

sition (SLA). It was a small field in the early 2000s (Koda, 2005, 2007) and even now remains a niche area of SLA, preventing researchers and language instructors from having a comprehensive understanding. Additionally, there is even less focus on learner perceptions on literacy and how those perceptions are impacted by the orthography itself. Most studies focus, understandably, on literacy skill acquisition.

Of the literature which does exist on L2 literacy, the majority of studies are on English as a second language (ESL). There is minimal research on literacy of other languages and orthographies from an L2 perspective (Cook & Bassetti, 2005; Koda, 2005; Perfetti & Liu, 2005). Even more recent publications that are not focused on ESL are predominantly focused on either Semitic languages (e.g., Eviatar, Taha, & Shwartz, 2018; Havron & Arnon, 2017) or Chinese languages (e.g., Kim, Packard, & Christianson, 2016; Zhang & Roberts, 2019). This research has, however, established that orthographic typology seems to impact processing and the skills needed for literacy.

To contribute further to this small-but-growing area of SLA, this paper presents a cross-lingual, mixed-methods study that examines how the orthographic transparency and typologies of 26 languages influences learners' perceptions of literacy acquisition in the L2. The specific research questions are as follows.

1. How does the phonological accuracy of an orthography impact learner perceptions towards L2 literacy acquisition?
2. How do differences between L1 and L2 orthographic typology impact learners' perceptions towards L2 literacy acquisition?

## **Literature Review**

### **Phonological Transparency and Literacy**

Phonological awareness has been tied to stronger literacy (Lau & Rickard Liow, 2005; Meschyan & Hernandez, 2004; Torgesen, 1999) and phonological transparency is key to stronger phonological awareness (Carlisle, 2004; Lau & Rickard Liow, 2005). These two concepts are strongly related but also critically different, so it is important to define each. Phonological awareness is a general (i.e., non-metalinguistic) sense of a language's phonological inventory and processes. Some scholars contrast this with phonemic awareness, which is an explicit (i.e., metalinguistic) knowledge of a language's phonological inventory (Torgesen, 1999). Phonological transparency refers to how intact the base form

(stem) of a word is in the derived or inflected form (Carlisle, 2004). For example, ⟨heal⟩ [hil] is the stem in both ⟨healing⟩ [hiliŋ] and ⟨health⟩ [hɛlθ]. In this example, ⟨healing⟩ is phonologically transparent but ⟨health⟩ is phonologically opaque (Carlisle, 2004). Research with children indicates that phonological awareness and orthographic phonological transparency have impacts on L1 literacy development; more phonologically opaque words are seen as more difficult for readers to correctly identify and lower degrees of phonological awareness correlate to lower levels of literacy (e.g., Carlisle, 2004; Torgesen, 1999; Windsor, 2000).

This implies that the more phonologically accurate an orthography is, the easier it will be to learn to read. This paper distinguishes between “phonological accuracy” and “morphological accuracy” in regards to orthographic transparency. An orthography may have high phonological accuracy, in which case everything is written as it is pronounced. An orthography may also have high morphological accuracy, in which case the surface form resulting from morphophonological processes are disregarded in lieu of maintaining accurate representation of the underlying forms. This is a divergence from more general terms such as “orthographic depth” or “orthographic regularity” because the distinction allows discussion about accurate representation of underlying vs. surface forms. The example of ⟨health⟩ above represents higher morphological accuracy and lower phonological accuracy.

It is also important to note the distinction between a writing system and an orthography. Perfetti and Liu (2005) distinguish them by the level to which they apply, which is also an approach used by Cook and Bassetti (2005) and, more recently, Meletis (2020). A writing system is the series of characters that may be used for a multitude of languages, such as the shared writing system of English and German, based on the Latin alphabet, contrasted with the writing system used for Russian and Ukrainian, based on the Cyrillic alphabet. Orthographies, however, are at the language-level and are the specific set of graphemes and rules that govern how a particular language is written. For example, while English and Swedish may share the Latin writing system they have different orthographies, with Swedish having letters that are not used in normal English like ⟨å⟩ and ⟨ö⟩ and the two orthographies representing different phonemes with different letters, like how ⟨j⟩ encodes /dʒ/ in English but /j/ in Swedish. This paper will follow the definitions as outlined by Perfetti and Liu (2005), Cook and Bassetti (2005), and Meletis (2020).

## **Literacy Development and Processing**

There are several models of literacy processing from a range of disciplines, many of which focus on the information processing and decoding aspects of

reading and writing. Two in particular were foundational for the design and analysis of the present study—Dual Route Model (DRM), also known as Dual-Route Hypothesis, and the LaBerge-Samuel's Model of Automatic Information Processing (hereafter referred to as the LaBerge-Samuel's Model). Both models are influenced by more general information processing models.

Dual-Route Model shows two procedures that readers can leverage during reading—one at the lexical level and one at the sub-lexical level (Angelelli et al., 2018; Coltheart, Curtis, Atkin, & Haller, 1993; Cook & Bassetti, 2005; Paap & Noel, 1991). The lexical procedure is when readers recognize a lexeme as a whole unit and do not break apart each sub-part into phonemes, syllables, morae, etc. The sub-lexical procedure is when subunits are decoded individually to achieve full lexeme decoding. The model has been used widely in literacy acquisition and developmental psychology research, especially in studies focusing on dyslexia. The Dual-Route Model has also been applied to writing, by which writers will either take the sub-lexical route and remember spellings based on individual grapheme-phoneme correspondences and sub-lexical chunks or take the lexical route and remember spellings based on complete wordforms (Cook & Bassetti, 2005).

Dual-Route Model makes the distinction between lexical processing and sub-lexical processing, which is also a feature in the LaBerge-Samuel's Model (Samuels, 1994). This model has multiple procedures by which a reader decodes a text by leveraging visual, phonological, and semantic memory. Similar to the Dual-Route Model, a reader may decode more at the grapheme and subunit level through recognition of spelling patterns, or at the word level through recognition of an entire word unit. This recognized visual stimuli is then connected to phonological information which then links to the meaning of the word (Samuels, 1994). While some other models of literacy processing recognize that decoding of text is not always so bottom-up and linear (e.g., Rumelhart, 1994) and literacy research has indicated that there are more cognitive processes at work than merely decoding visual stimuli (see Doyle, 2013), the LaBerge-Samuel's Model cleanly models the decoding process of literacy by which the reader converts visual stimuli into linguistic information.

Both models indicate that decoding happens more granularly when a word is unfamiliar or when an individual is just beginning to learn to read and write. Then, once spelling patterns and words become more familiar, words can begin to be recognized as a single unit. However, the level of reliance on phonological decoding at the sub-lexical level appears to differ across orthographies (Angelelli et al., 2018; Cook & Bassetti, 2005; Koda, 2008; Perfetti & Liu, 2005). For example, phonological activation occurs prior to word identification for languages such as English but not Chinese (Perfetti, Zhang, & Berent, 1992). This is explored further in the following section.

Dual-Route Model and the LaBerge Samuel's Model are primarily about the cognitive procedures used for encoding and decoding language. If one takes the stance that the core function of an orthography is to encode a particular language, then it is also assumed that the core process behind reading is decoding linguistic information from written symbols. In other words, reading is "converting graphic input to linguistic concepts" (Perfetti & Liu, 2005). It is important to note that this encoding to linguistic information may not always be at the phoneme or even the syllable level (Bassetti, 2005; Cook & Bassetti, 2005; Koda, 2005; Lau & Rickard Liow, 2005). A review of writing systems which are pictographic and ideographic in nature, such as Chinese and Japanese, show that not all orthographies encode simple phonemic information (Perfetti & Liu, 2005). Rather, some orthographies encode a mix of phonemic and semantic information. As an example, the Japanese word for "to think (about)" is /kangaeru/ and written as (考える), with an ideographic symbol – 考 – and two syllabary graphemes – え /e/ る /ru/. Analysis of other levels of encoding, such as this, leads to the proposal of the Universal Phonological Principle (UPP), which states that during reading, phonological information is activated at the lowest level allowed by that language's orthography (Perfetti, Zhang, & Berent, 1992; Perfetti & Liu, 2005). This may be at the level of the phoneme (e.g., Russian), syllable (e.g., Cherokee), morpheme (e.g., Chinese) or even word (e.g., Japanese gikun words). An important note is that this does not mean readers decode a single grapheme as a single unit, since some orthographies use multiple graphemes for a single phonological unit. As an example, English encodes /t/ as ⟨t⟩ but /ʃ/ as ⟨sh⟩ (Perfetti, Zhang, & Berent, 1992). This ties to the concept of "grain size," which is the smallest amount of orthographic information needed to successfully decode the orthography into linguistic units (Cook & Bassetti, 2005, p. 16). For example, Italian has a very small grain size due to the very simple phoneme-grapheme correspondence in the orthography. Conversely, English has a higher grain size which sometimes requires multiple graphemes making up a full syllable to be decoded as a chunk (Cook & Bassetti, 2005), such as the ⟨ough⟩ /u/ in ⟨through⟩ /θru/.

These ideas raise interesting questions about the potential influence of phonological accuracy and orthographic typology on literacy. Much research tying phonological transparency and phoneme awareness to literacy has been focused on English and other alphabetic languages, where phonological information is encoded at the phoneme level. These ideas also highlight the importance of phonological activation for literacy, regardless of the orthographic typology.

There is some disagreement in the literature about the role of phonological activation for literacy and exactly when in the reading process phonological activation occurs. It is fairly well established that phonological activation is a part of the reading process, regardless of writing system typology (Cook & Bassetti, 2005; Perfetti, Zhang, & Berent, 1992), but the typology can im-

pact when this activation occurs in relation to activation of other linguistic features (Cook & Bassetti, 2005). Assuming this is true, then this implies the more easily readers can identify phonological segments during phonological activation, the easier the word form itself can be successfully decoded. This leads to the idea that an orthography that is ideal for literacy is one that best facilitates the most efficient encoding and decoding of wordforms. As can be seen, phonological activation is a part of this encoding and decoding process and strong phonological awareness appears to be a better indicator of literacy skills in young English L1 readers than morphological awareness (Windsor, 2000), though the importance of morphological transparency and awareness should not be forgotten.

There is a disjunction between phonological and morphological accuracy in orthographies, with the two often being two ends of a spectrum. Some languages that have minimal morphophonological processes tend to be both phonologically and morphologically transparent, allowing the orthography to also be both phonologically and morphologically accurate. However, morphophonological processes result in opacity of underlying forms, which in turn results in either a morphologically or phonologically inaccurate orthography. So, which is better for literacy processing? Is it better for an orthography to represent the underlying morphemes, disregarding phonological processes, or provide a more accurate phonological representation, obfuscating underlying morphemes?

Literacy studies, including the present study, seem to suggest that phonologically accurate orthographies should be easier to read. Early writing on phonology and orthographies took this approach to the extreme. For example, from Pike's 1947 guide *Phonemics: A Technique for Reducing Languages to Writing*: "Once the native learns an orthography which is closely correlated with his sound units, there is no 'spelling' problem. Everything is spelled as it is pronounced and pronounced as it is spelled" (Pike, 1947, p. 57). Swadesh (1934) took a similar stance by suggesting that orthography development should be a mere phoneme-to-grapheme relationship.

However, Carlisle (2004) argues for the opposite—more morphological accuracy. Carlisle (2004) and others have shown the importance of morpheme awareness on literacy processing (Bryant & Nunes, 2006; Koda, 2005, 2007). She gives the example of how confusing it may be to recognize the English plural suffix if English spelled words with too much phonological accuracy, such as [kæts ænd dɔgz] being encoded as \*(cats and dogz) rather than ⟨cats and dogs⟩ (Carlisle, 2004). Another example of higher morphological accuracy in a different writing system is from Korean, which uses Hangul. In Korean, the formal indicative form of a verb has the suffix ⟨ㅂ니다⟩, which could be literally transcribed as /b.ni.da/, as in 줍니다 "give" /dʒumnida/. 줍니다 is spelled with ⟨ㅂ⟩ /b/, which becomes [+nasal] when preceding an nasal. The underlying

morpheme is retained by writing *줍니다* rather than \**줍니다*, using the Hangul letter for /m/ – ⟨ㅁ⟩.

Snider (2014) proposes a sort of compromise—one which appears to be strongly supported by the collective research on literacy development. He proposes that in cases of derivational morphology, more phonological accuracy should be preferred whereas in cases of inflectional morphology, more morphological accuracy should be preferred. The reason for this is that speakers are likely more sensitive to morphophonological changes in cases of inflectional morphology (Snider, 2014). This is likely because inflectional morphology is often a more productive part of the language, meaning the surface forms are more readily accessible and, therefore, do not need to be represented as accurately. This is echoed by Willis Oko (2018) when discussing orthography development for unwritten languages. Her stance is that if the target audience of readers are native speakers, then it could be assumed that phonological changes due to productive morphology could be represented with their underlying forms, seeing as native speakers will be fluent in these alternations. However, if the target audience of readers are semi-fluent or new learners then a more phonologically transparent orthography would be preferred so that those without native speaker intuitions could still accurately decode the text sub-lexically into correct pronunciation. Transferring this to foreign language students, it could very well be the case that more morphologically transparent orthographies serve native speakers very well but provide more difficulties for learners of the language. It is possible that new learners of an orthography rely heavily on sub-lexical decoding and cannot yet decode entire morphemes and lexical units. A more phonologically accurate orthography would better enable this sub-lexical route of processing.

## Literacy Development in the L2

Despite substantial research on literacy development in the L1, there remains sparse literature focusing on literacy acquisition in the L2, much of which has been focused on L1 transfer to the L2 (Cook & Bassetti, 2005). While research on L1 literacy does provide insight, literacy acquisition for the L2 is impacted by the L1 and, as a result, it is different and more complex (Bassetti, 2005; Cook & Bassetti, 2005; Koda, 2005, 2007). The Transfer Facilitation Model (TFM) assumes that all reading is filtered through L1 metalinguistic knowledge and L1 literacy experience (Koda, 2005). It is common for learners to already have some level of literacy in their L1, which can result in transfer that impacts processing of the L2 orthography (Koda, 1998, 2005, 2007).

As an exercise, examine the grapheme ⟨j⟩. In some languages like Spanish this grapheme encodes /h/, in some like Swedish it encodes /j/, and in others

like English it encodes /dʒ/. The phonological activation of ⟨j⟩ for readers who speak Swedish and English both will likely differ than readers who only speak one of these languages. Additionally, the activation of ⟨j⟩ will also be different for speakers of Swedish and English compared to readers who know Swedish and Danish (which also encodes /j/ with ⟨j⟩). As a more specific example, a popular German tourist destination is the town of Rothenburg, which is read [ʁoʦn̩bʊʁk] in German but is often mistakenly read as [ɹɑθɪnbɪg] by English speakers due to, among other things, incorrect decoding of ⟨th⟩ as [θ] from L1 interference. Meschyan and Hernandez (2004) explore this in detail, focusing on phonological working memory and other cognitive processes impacting both vocabulary and literacy acquisition in the L2. They define “phonological working memory” as “temporary storage for unfamiliar sound forms until more permanent representations are constructed” (p. 74). In other words, a reader must store newly learned phoneme and grapheme correspondences in their working memory until long-term retention (LTR) is achieved. As in the above example, remembering to read ⟨th⟩ in German as [t.h] instead of [θ] requires use of phonological working memory for beginner German readers with an English L1 background. Similarly, learning completely new graphemes and associating these symbols to phonemic units requires phonological working memory, like when a student is learning to read Russian and must remember that ⟨я⟩ encodes /ja/ until LTR is achieved. Phonological ability is considered a combination of phonological working memory alongside phonological awareness, which has been linked to better acquisition of new lexemes and literacy in the L2 (Meschyan & Hernandez, 2004). The examples of ⟨j⟩ and ⟨th⟩ demonstrate how the L1 can influence the L2, which can in turn influence literacy acquisition and decoding accuracy. It may be easy to assume that learning to read an L2 orthography with the same writing system as the L1 should be an easy task, but the above examples show that things are not so clear-cut.

Koda (1998, 2005) has explored the transfer of L1 literacy to the L2 and found that L1 phonological processing behaviors seemed to carry from the L1 to the L2, meaning the orthographic typology of the L1 comparative to the L2 can also impact L2 literacy acquisition. In her study, Koda compared English L2 orthography decoding behavior between students of alphabetic (Korean Hangul) and non-alphabetic (Chinese Hanzi) L1 backgrounds. The relationship between phonemic awareness and decoding of written words was stronger for Korean L1 readers compared to Chinese L1 readers (Koda, 1998). This corroborates prior research that indicated phonemic awareness transfers between Spanish and English, both of which use the Latin writing system (Koda, 1998).

This does not mean there is identical processing across alike typologies—there is still different processing from one orthography to the other even within the same writing system. For example, German readers tend to rely more on phoneme-grapheme decoding during reading compared to English readers, who

tend to also rely on whole-word decoding due to the inconsistencies of English spellings (Perfetti & Liu, 2005). Koda also cites prior research on young English and Japanese readers, comparing an alphabet to a syllabary, which indicated that alphabetic literacy better promotes phonemic awareness (Koda, 1998). These studies and others (e.g., Bassetti, 2005, Lau & Liow, 2005), demonstrate that not only phonological and morphological accuracy impact L2 literacy acquisition but also the typology of the L1 orthography. This is yet another way L2 literacy is more complex than that of the L1.

### **Learner Perceptions and Motivation**

The current study seeks to explore L2 learner perceptions and attitudes towards literacy, primarily due to the strong relationship between learner attitudes and learner motivation (Dörnyei, 2005; Gardner, 1985). These attitudes may be in relation to the language community or the language itself. In the case of the present study, the focus will be on attitudes towards the language, especially the orthography. Perceptions of the orthography being easy or difficult could potentially put learners in a positive or negative frame of mind when engaging in literacy practice. Additionally, frustration over orthography difficulty could lead to negative emotions being related to literacy. This is important because motivation is tied to emotional factors (Dörnyei, 2009). These factors could be positive emotions such as confidence or negative emotions such as frustration (Dörnyei, 2009). Therefore, negative emotions associated with an orthography or, conversely, positive emotions associated with an orthography could influence learner motivation to learn to read and write. These emotions and perceptions could even influence learners' decisions about trying to achieve literacy at all. As an example of this, the Japanese orthography is generally considered extremely challenging to learn and literacy is often the most difficult aspect of acquiring the language (Paxton & Svetenant, 2014). As a result, it is not unusual to see certain Japanese instructional books avoid the orthography altogether to cater to those learners who do not want to struggle with it. *Japanese for Busy People* is a popular self-study book series that offers a fully "Romanized" version where all Japanese words are transcribed using the Latin alphabet (Association for Japanese-Language Teaching).

In addition to SLA research on more general emotional factors, there has been substantial focus on individual differences, of which motivation is a component. Individual differences refer to unique or personal factors that make each learner different and, thus, make each learner approach language learning slightly differently. These differences are believed to impact how successful an individual may be at learning the L2 (Dörnyei, 2003). Commonly examined individual differences include language aptitude, attitude, motivation, and

learning styles (Dörnyei, 2003). Of these, motivation is considered among the most critical indicators of L2 success (Gass, Behney, & Plonsky, 2013, p. 453).

Considering the importance of motivation on L2 learner success and the close relationship between attitude and emotion on motivation, this study seeks to better understand attitudes and perceptions of learning L2 orthographies. It is hoped that results will provide insight that can aid in motivational techniques for foreign language students as well as give educators a better understanding of potential circumstances which may necessitate early intervention for student success.

## Methods

To address the research questions, the author performed a pilot study to inform the present study, which uses two components—a semi-structured survey and an analysis of orthographies. The pilot study was a small, simplified online survey of eight questions. The survey focused on testing the questions and assessing the validity of the data analysis. The data from the pilot was fully analyzed to identify potential gaps or shortcomings of the nature of data collected. Additionally, it allowed for a test of the survey content to ensure that participants understood the questions and that the questions yielded the desired type of data.

The pilot survey was semi-structured with a mix of quantitative and qualitative questions that focused on learner perceptions of difficulties with L2 literacy acquisition. The survey also collected basic information regarding the learner's L1, their L2, and self-assessments for general fluency and literacy.

The pilot study had a total of 55 respondents, 35 of which were English L1. The 55 respondents collectively gave answers about 14 different languages. The orthographies of these 14 languages were then assessed for phonological accuracy and typology to compare against the transparency and typology of the corresponding L1. Preliminary results from the pilot indicated that more accurate orthographies are easier to learn, regardless of the orthographic typology. The present study attempts to verify these initial findings from the pilot using an improved survey and larger data set.

Like the pilot, the present study leveraged a semi-structured online survey modeled after the version used in the pilot. Based on the results from the pilot study, more biodemographic questions were added and the phrasing of one question was modified to avoid confusion that was encountered by respondents in the pilot. Being semi-structured, the survey was a mix of qualitative and quantitative questions, though the quantitative questions were largely in

place to capture descriptive statistics and control variables such as L1 and self-assessments of the L2. To assess learner perceptions, the below two questions were asked about the respondents' identified target languages:

“Please describe any difficulties with learning the writing system, including learning new symbols and learning the proper spelling of words.”

“What frustrated you most about learning to read the language?”

Following data collection, an analysis was performed on both the L1 and the L2 orthographies reported by respondents of the survey. The analysis focused on the phonological accuracy of the orthographies themselves which, as discussed in the literature review, is the degree to which a word's written format accurately reflects its pronunciation. Until recently, there was not a strong way to quantify phonological transparency or orthographic accuracy with much confidence (Borleffs, Maassen, Lyytinen, & Zwarts, 2017). However, very recent developments in research using artificial technology have shown some promising results. Marjou (2021) used artificial intelligence to give different orthographies a score for orthographic transparency. While this research is still preliminary and the results are not exhaustive for all languages captured in the survey, it does serve as a good baseline for analysis and is more reliable than the subjective analysis performed for the data gathered from the pilot. Additionally, since specific percentage scores from Marjou (2021) are not available for all languages, the full analysis was partially subjective and could not be as accurate as the data from Marjou (2021). Therefore, languages were merely given a Low, Medium or High ranking that was meant to be largely relative for the purposes of comparing against the survey data set. For example, even though Italian was shown to have a higher transparency score than Spanish (Marjou, 2021) both were given an orthographic accuracy score of High due to their relative accuracy compared to many other orthographies such as French, English, and Japanese. Additionally, some orthographies that are sometimes considered more “regular,” such as French, still have lower orthographic phonological accuracy in terms of grapheme-phoneme correspondence and reflecting surface form vs. underlying form so they received a lower ranking. Ultimately, it was also decided that a Very Low ranking should be used for writing systems that encoded meaning over phonological information and are therefore much less phonologically transparent and difficult to learn, such as Japanese kanji. A ranking of Very High was not deemed necessary and was thus not added to the ranking system. For the purposes of comparing rankings, these values were also given corresponding numbers, Very Low = 0, Low = 1, Medium = 2, High = 3. While not perfect, this method allowed for key patterns to be isolated among the survey results and provide a basic foundation on which

to ground the following analysis. Appendix A includes the rankings given to each orthography. The results of the analysis were then compared against the answers from the survey to find possible patterns.

## Results and Analysis

The survey for the present study had 233 completed responses recruited through online language learning communities and social media. Once responses were reviewed, 16 responses were thrown out due to malformed data or invalid responses, resulting in a final total of 217 responses for analysis ( $n = 217$ ). SPSS 25 was used to perform the quantitative analysis and run descriptive statistics. Of the 217 respondents, 116 (53.5%) identified as female and 87 (40.1%) as male, with the remaining 14 (6.4%) identifying as non-binary or preferring not to answer. 121 (55.8%) respondents were between the ages of 18 and 34, which is likely a result of the recruitment methods. All but 26 respondents (88%) were under the age of 55. Education level was a mix, with 69.1% of the respondents having completed college and 30.4% of those also having completed graduate school. Across all 217 responses, there was a total of 30 unique native languages identified, with 145 (66.8%) being L1 English. For target language, there were 26 unique languages identified. The writing systems and writing system typologies for each language were identified and are listed in Tables 1 and 2. A more detailed breakdown of L2 languages among the responses are listed in Appendix A. In addition to the primary target languages identified, respondents frequently listed additional languages they had exposure to or had learned. For the purposes of the present study, only the primary target language was the focus for each respondent's answers.

**Table 1**

*L1 Writing Systems and Typologies in Responses*

L1 Writing System	Typology	Frequency	Percent
Arabic	Abugida/Abjad	3	1.4
Brahmic	Abugida/Abjad	4	1.8
Cyrillic	Alphabet	12	5.5
Hanzi/Kanji	Picto-/Ideographic	2	0.9
Latin	Alphabet	196	90.3

**Table 2***L2 Writing Systems and Typologies in Responses*

L2 Writing System	Typology	Frequency	Percent
Arabic	Abugida/Abjad	8	3.7
Brahmic	Abugida/Abjad	1	0.5
Cyrillic	Alphabet	12	5.5
Greek	Alphabet	1	0.5
Hangul	Alphabet	1	0.5
Hanzi/Kanji	Picto-/Ideographic	35	16.1
Latin	Alphabet	159	73.3

As seen in Tables 1 and 2, the majority of the respondents had a Latin-based Alphabet for their L1 and their L2, and there were a few incidents of L2 writing systems with minimal responses. Rather than looking specifically at writing systems, much of the following analysis was focused on L1 and L2 writing system typologies, which is a broader category (e.g., Greek and Hangul both fall under Alphabet). When comparing the L1 writing system typology to that of the L2, the typologies mismatched in 50 (23%) of the responses while matched in the remaining.

In a self-assessment of L2 literacy abilities, which was prompted with a 0–10 sliding scale, 146 (67.3%) indicated they felt they at least a moderate (> 5) level of literacy. Scores of self-assessed literacy skill were higher on average (6.11) than the self-assessment of general fluency (4.94), possibly due to the fact that, generally, it is faster to learn the L2 orthography than the entirety of the L2. This was also seen in the data collected from the pilot survey.

Additionally, 37.8% of the respondents assessed their reading abilities at 8–10 compared to only 20.3% of the respondents giving an 8–10 score on self-assessment of fluency, which also follows the pattern seen from the pilot. The exceptions to this were the responses with a target language of Chinese (Mandarin) or Japanese, with much more complex orthographies that can take years to master. For these two target languages, no respondents indicated a 9–10 for literacy skills and 77.1% put 5 or lower compared to only 62.9% put 5 or lower on general fluency. It is important to remember these are self-assessments only, so while they may not indicate actual fluency and literacy abilities, they do provide insight into learners' perceptions of their own skills, which is more relevant for the present study.

The answers to the two open-ended questions were coded to determine patterns across respondents' perceptions. The codes were designed to capture the presence or absence of difficulty with literacy acquisition and, if present, the nature of the difficulty. The codes for difficulty indicated whether the

respondent had problems with general spelling, diacritics, phoneme-grapheme correspondence, or the writing system itself. General spelling covers memorizing spelling patterns and remembering “silent” letters, etc. There is some overlap between the general spelling and the phoneme-grapheme correspondence difficulty code, but the grapheme-phoneme correspondence was specific to difficulty remembering correspondences or learning new correspondences, such as in one response from an English L1 learner of Dutch: *Some letter combinations produce different sounds than they do in English*. A distinct code was used for problems with diacritics due to the frequency of comments about accent marks and umlauts (12%). The difficulty code for writing system was used for responses which explicitly stated difficulty learning new symbols for writing, such as one respondent who was an English L1 learner of Arabic: *Different alphabet and right to left writing*. Table 3 shows the complete breakdown of the difficulty codes from the data set. Of the 47 responses coded for writing system difficulty specifically, 37 were for a target language of Chinese (Mandarin) or Japanese.

**Table 3**  
*Descriptive Statistics for Difficulty Codes*

Nature of Difficulty	Frequency	Percent
None	105	48.4
Spelling	29	13.4
Diacritics	26	12
Phoneme-Grapheme Correspondence	10	4.6
Writing System	47	21.7

The free-form answers to the open-ended questions in the survey also provide some interesting insight. While many respondents put brief answers, stating they had no issues with learning to read and write, others gave more in-depth responses. Some of the more notable results from both the quantitative analysis and qualitative answers are provided in the following sections.

### **Difficulty and Self-Assessed Literacy**

A Univariate Analysis was run to compare the literacy self-assessment score with reported difficulty given based on qualitative answers. There was a statistically significant correlation with perceived difficulty and the self-assessment of literacy skills ( $F = 25.938$ ,  $p = .00000076964604651431$ ,  $\eta^2 = .108$ ) with an observed power of 0.999. In other words, if a respondent expressed difficulty

with learning to read their target language, then they were more likely to also rate themselves as less literate compared to the respondents who expressed no issues with learning to read or write. Since the literacy assessment was a self-assessment, it is not clear whether difficulty with L2 literacy acquisition actually results in lower levels of literacy skill or merely a perceived lower level of literacy skill. Additional research would be necessary to determine whether this difficulty merely results in a lack of confidence in one's own literacy or if there is actually an impact to literacy abilities. If the latter, it would be valuable to explore whether this impact was related to difficulty of the L2 itself or due to avoidance of literacy practice stemming from frustration or poor experience with learning. Another possible explanation is that learners who are still not very literate are still in the midst of learning to read and write, so they perceive the difficulty more strongly compared to more literate respondents who may have forgotten some of their early struggles.

### **L1 and L2 Mismatch**

To assess a potential relationship between L1 and L2 writing system typologies and perceived difficulty, a Chi-square test was run to compare difficulty from qualitative answers to both L1–L2 writing system mismatch and typology mismatch. Interestingly, while the Chi-square test indicated a statistically significant correlation between perceived difficulty and both typology and writing system, the significance for the typology mismatch— $X^2(1, n = 217) = 24.022, p = .00000095255810167634$ —was greater than for the writing system mismatch— $X^2(1, n = 217) = 18.001, p = .00002207434151596157$ . This indicates that, while a new writing system in general is usually perceived as more difficult, there is a much stronger chance of perceived difficulty when the typologies of the L1 and L2 writing systems do not match. This was also the case during the pilot.

These results initially seem very significant. However, Chinese and Japanese both have exceedingly more complex writing systems compared to, for example, Arabic or Russian, since they encode linguistic information at the morpheme level as opposed to the phoneme or syllable level. Therefore, to verify the significance of the Chi-square test, responses for L2 Chinese (Mandarin), Chinese (Cantonese), and Japanese were removed and the tests were re-run with the remaining data ( $n = 182$ ). With these more complex writing systems removed, the significance of the relationship between difficulty and typology mismatch vanished— $X^2(1, n = 182) = .365, p = .54548840201428050000$ —but the relationship between difficulty and writing system difference remained significant— $X^2(1, n = 182) = 1.068, p = .30138063626919240000$ —albeit only at the 0.05 level. This indicates that the level of linguistic information encoded by

the orthography, which often determines complexity, influences the relationship more than typology mismatch alone.

For all of these relationships, tests were also run with age, gender, and education level as controls to confirm these were not significant factors. Results showed that the relationship between L1–L2 writing system and typology mismatch were still statistically significant even when controlling for age, gender, and education level. Additionally, when looking at age, gender, and education level compared to general difficulty, there was no statistically significant relationships, indicating these are not significant factors for learners' perceived difficulty of literacy acquisition in the L2.

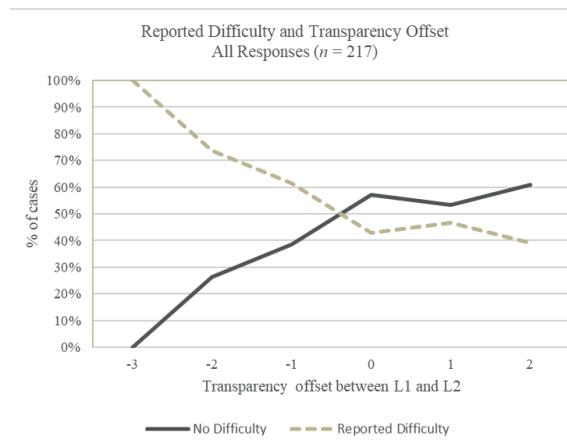
### Orthographic Phonological Accuracy

Based on the ranking of orthographic phonological accuracy given to each language, results were given a Transparency Offset score, which indicated how much more or less the transparency of the orthography of the L2 was compared to that of the L1. For example, if the L1 was a High (3) transparency and the L2 is a Low (1) transparency, the offset score was  $-2$ . This offset was then compared to difficulty scores to examine potential relationships.

A Univariate Analysis was used to compare difficulty to transparency offset scores. There was a significant ( $F = 17.625$ ,  $p = .00003938537485147854$ ,  $\eta^2 = .076$ ) relationship between difficulty and transparency offset codes that indicated the less transparent the L2 is relative to the L1, the more likely a respondent will report difficulty learning to read.

**Figure 1**

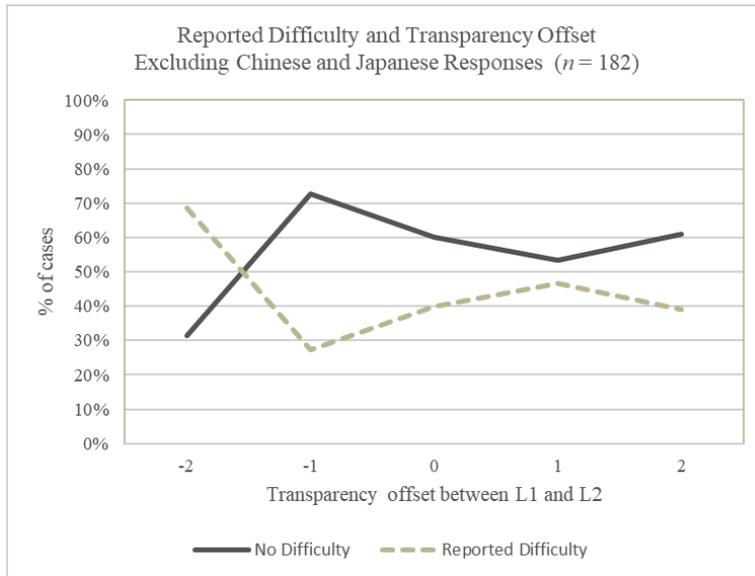
*Chart Comparing Transparency Offset to Reported Difficulty*



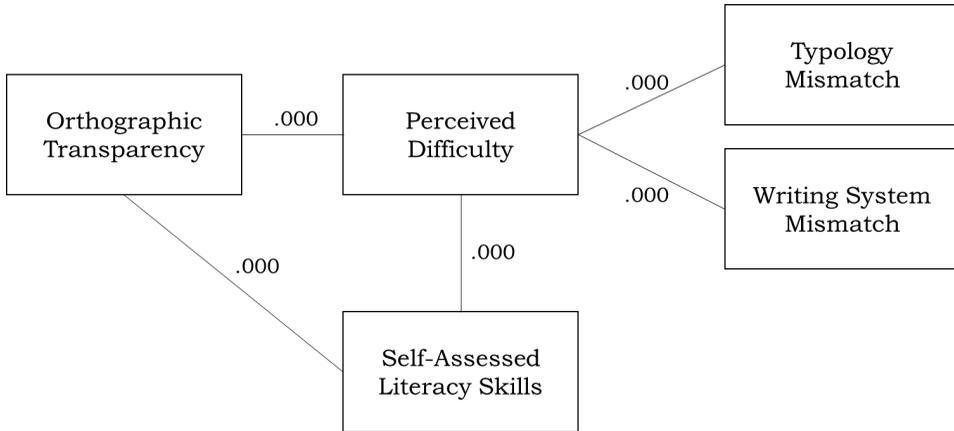
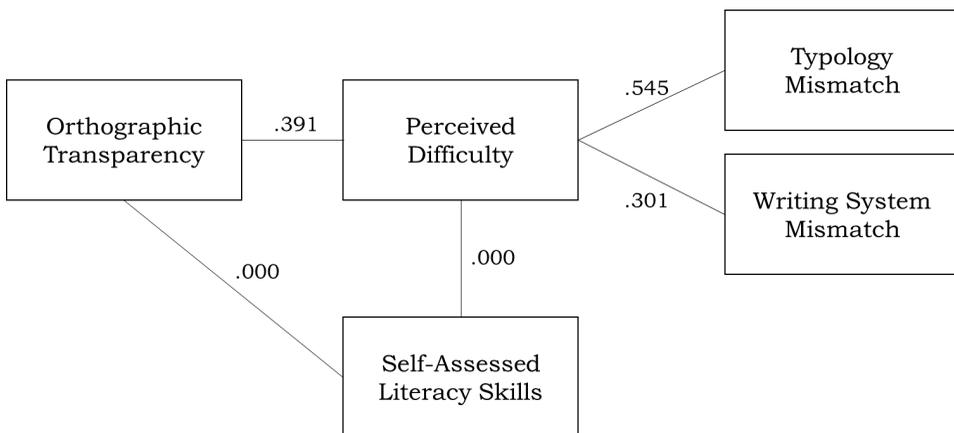
To explore this further, responses for L2 Chinese (Mandarin), Chinese (Cantonese), and Japanese were removed ( $n = 182$ ) and a Univariate Analysis was run again to compare difficulty with transparency offset. As seen with other tests, the correlation between difficulty and transparency offset was not as significant once the more complex writing systems were excluded from the analysis ( $F = .738$ ,  $p = .39154513894622280000$ ,  $\eta^2 = .004$ ).

**Figure 2**

*Chart Comparing Transparency Offset to Reported Difficulty Excluding Chinese and Japanese L2 Responses*



Transparency offset scores were also compared to self-assessed literacy skills using a Univariate Analysis. Transparency offset showed to have a significant relationship with self-assessed literacy ( $F = 4.913$ ,  $p = .00028295736452932905$ ,  $\eta^2 = .104$ ). However, as with other tests run, Chinese (Mandarin), Chinese (Cantonese), and Japanese L2 responses were removed and the tests rerun. With the more opaque writing systems of Chinese and Japanese removed, the correlation between transparency and self-assessed skill did not show to be as strong, but still significant ( $F = 6.017$ ,  $p = .00014579934867490815$ ,  $\eta^2 = .120$ ). Figure 3 summarizes the significant relationships ( $p$ -values) between tested variables when all responses were considered ( $n = 217$ ). However, considering the impact more opaque writing systems Chinese and Japanese had on the analysis, Figure 4 shows how the relationships changed when those L2 responses were removed ( $n = 182$ ).

**Figure 3***Model of Significant Relationships across all Responses***Figure 4***Model of Relationships Excluding Chinese and Japanese L2 Responses*

This is further evidence that it is not merely the typology and writing system alone but also the level of complexity of the orthography. The remaining results sections are largely excerpts from the qualitative answers.

### Perception of Phonological Accuracy

A common complaint among responses was about phonological accuracy and, when responses mentioned learning to read was easy, they sometimes attributed this to the phonological accuracy of the orthography. The following responses are a mix from the present study and the pilot.

“The writing system in Spanish is very easy, in fact it seems more phonetic than English” (L1 English, L2 Spanish)

“[...] if you know the alphabet in Spanish, you can read it.” (L1 English, L2 Spanish)

“[...] words aren’t spelt the way they are pronounced.” (L1 Russian, L2 English)

“I have had three main difficulties with the writing system” [...] “There are a number of spelling rules/irregularities, such that it isn’t always possible to correctly pronounce unknown words.” (L1 English, L2 Korean)

“It is difficult to know whether a word finishes with a d or a t, as they sound the same.” (L1 English, L2 Dutch)

## **Diacritics**

There were several responses noting difficulty around the representation of suprasegmental features, such as accent marks for stress. This difficulty could merely be due to lack of accent marks/diacritics in their L1 orthography, making the graphemes harder to remember. However, it could also be due to the L1 orthography not encoding suprasegmental features at all, so these phonological attributes are not paid much attention to. The necessity to now encode these features in the orthography is challenging because it requires more attention be given to these phenomena. Therefore, it is not merely remembering the graphemes themselves but a greater burden on phonological working memory to remember suprasegmental features that are not a focus in the L1.

“Accent marks are sometimes difficult as they vary greatly depending on the conjugation of the verb.” (L1 English, L2 French)

“Accents above vowels have no apparent reason/logic as to where they’ll be.” (L1 English, L2 Spanish)

“It’s very hard to remember how to spell words with accents because in English accents don’t matter at all.” (L1 English, L2 French)

## Discussion and Future Research

In addition to the brief discussion given in the previous sections, the following section will synthesize major themes from the results and discuss potential pedagogical applications, study limitations, and future research.

The present study was aimed at addressing the following research questions:

1. How does the phonological accuracy of an orthography impact learner perceptions towards L2 literacy acquisition?
2. How do differences between L1 and L2 orthographic typology impact learners' perceptions towards L2 literacy acquisition?

For question 1, phonological accuracy of the L2 orthography does appear to impact students' perceptions of difficulties, but this accuracy is relative to that of the L1. In other words, the level of transparency of the L2 relative to that of the L1 is inversely correlated with the difficulty students are likely to report. While this may seem intuitive, it is interesting when considering the findings for question 2. Based on the results of the study, different writing systems and different writing system typologies do not seem to result in difficulties for foreign language students but, rather, the orthographic transparency of the L2 compared to the L1 is a greater factor to predict student difficulty.

Prior research has shown that typology seems to have some impact on literacy (Bassetti, 2005; Cook & Bassetti, 2005; Koda, 2005; Lau & Rickard Liow, 2005), but the present study indicates that either this impact is not as apparent to the learners themselves or the nature of the relationship between typology and literacy is more complex. Additionally, much of the prior literature examining the impact of typology was focused on Chinese or Japanese being either the L1 or L2. As indicated by the results of the present study, when these two languages are compared to others, the typology *does* have a significant impact. However, that is more likely due to the complexity of these writing systems and the fact that they require acquisition of a larger number of units rather than being indicative of an impact of typology itself. In other words, is the difficulty actually due to how linguistic units are encoded or the sheer number of graphemes in the orthography? More research would be necessary to explore this further.

It is also important to reiterate that the present study focuses on self-assessment and personal narratives rather than examining strictly quantitative language competency scores. The purpose of the study was to see how students themselves felt about their literacy abilities and personal struggles learning to read. Further research on student perceptions and literacy that also leverages

quantitative competency scores would help clarify our understanding of these findings.

The present study was also focused primarily on the phonological accuracy of orthographies, rather than the morphological accuracy. While this was intentional, it does narrow the analysis of the data and could be a potential limitation. As previously mentioned, orthographic transparency has two main aspects—phonological accuracy and morphological accuracy, as was illustrated by the examples of ⟨healing⟩ and ⟨health⟩. Snider (2014), Willis Oko (2018), and others (e.g., Carlisle, 2014) have argued that there is benefit to morphological transparency in certain situations and for certain reader demographics.

While phonological accuracy better facilitates sub-lexical decoding, morphological accuracy could better benefit fluent readers with more rapid morpheme and word-level identification. In fact, one respondent who was L1 Czech and L2 English seemed aware of this in their response: “It seems English is geared towards recognition of words, rather than letter sounds, which makes it difficult to construct words by their letters alone.” Subsequent research to follow this study would include more comprehensive analysis of both the phonological accuracy and morphological accuracy of orthographies to see if any patterns emerge.

There are potential applications of these findings in the classroom. Based on the present study, more phonologically opaque orthographies are more difficult for learners to acquire. However, if the orthography is morphologically accurate, then teaching morphemes more explicitly could help students jump to morpheme-level decoding faster. If students can more easily identify familiar chunks of words, then this could get them to the lexical processing route more quickly, thus mitigating the difficulties of phonologically opaque text. Students may also benefit from instructors directing their attention to the morphological accuracy of the orthography so they can begin to recognize chunks in written words. Having a better appreciation for how an orthography is encoding the language could alleviate frustration with phonological opacity.

As mentioned throughout the literature review, L2 literacy acquisition remains understudied. Future research could extend this study and improve upon it further, as the present study had some limitations despite being improved after the pilot. One limitation was that the present study made no attempts to get objective language competency scores through any assessments. Subsequent studies could include objective data on respondent fluency to compare against the self-reported, subjective data that was collected for the present study. While subjective data was the focus, to gauge perceptions, comparison with objective data could add value to the overall analysis.

Another limitation of this study was a failure to get a quantitative ranking of difficulty from the respondents. The respondents gave only qualitative answers which had to be coded. Assigning a ranking to a qualitative answer

would have been too subjective, so only the type of difficulty was coded, not the level of difficulty. Conducting a similar study while capturing a difficulty ranking from the respondents, such as with a Likert scale, could yield more accurate quantitative analysis of relationships between variables.

Lastly, while the present study had a fair sample size ( $n = 217$ ), 30 target languages were identified so the number of respondents for some of the languages was low. A much larger data set would ensure all target languages have more representation, which would verify the transferability of the results. Despite these limitations, it is hoped that the present study provides additional insight into perceptions of literacy among L2 learners.

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Rachel Garton

## Der Einfluss von orthografischer Transparenz und Typologie auf die Wahrnehmung von L2-Lernenden

### Zusammenfassung

Während die Lese- und Schreibfähigkeit in L1 bereits eingehend erforscht ist, bleiben Faktoren, die sich auf dieselben Sprachkompetenzen in L2 beziehen, von der Forschung vernachlässigt. Vorläufige Untersuchungen deuten darauf hin, dass orthografische Genauigkeit und Typologie den Schriftspracherwerb beeinflussen, was dafür spricht, dass die Aspekte der sprachlichen Repräsentation im Kontext des Zweitspracherwerbs (SLA) weiter erforscht werden müssen. Darüber hinaus werden in der SLA-Forschung zu individuellen Unterschieden zwischen Lernenden emotionale Faktoren wie Einstellung und Motivation hervorgehoben, die weithin als kritische Indikatoren für den L2-Erfolg gelten. Die Motivation steht in engem Zusammenhang mit der L2-Wahrnehmung, was darauf verweist, dass die Wahrnehmung der L2-Lernenden den Erfolg beim Lesen- und Schreibenlernen beeinflussen könnte. Im vorliegenden Beitrag wird eine sprachübergreifende Studie mit gemischten Methoden dargestellt, in der die orthografische Transparenz und Typologien von 26 Sprachen mit Wahrnehmungen der Lernenden ( $N = 217$ ) in Bezug auf den Schriftspracherwerb in L2 verglichen werden, z. B. mit der wahrgenommenen Schwierigkeit der Orthografie und Selbsteinschätzung der Lese- und Schreibfähigkeit. Die Ergebnisse zeigen, dass die orthografische Transparenz einen größeren Einfluss auf die Wahrnehmung der Lernenden als die Typologie selbst hat.

**Schlüsselwörter:** Phonologie, Orthografie, Lese- und Schreibfähigkeit in L2, Schriftspracherwerb, Wahrnehmung der Lernenden, Schriftlinguistik

### Orthographic Transparency Rankings for Included Languages

Target Language	Transparency	Writing System	Typology
Arabic	Medium	Arabic	Abugida/Abjad
Chinese (Cantonese)	Very Low	Hanzi	Picto-/Ideographic
Chinese (Mandarin)	Very Low	Hanzi	Picto-/Ideographic
Dutch	Medium	Latin	Alphabet
English	Low	Latin	Alphabet
French	Medium	Latin	Alphabet
German	High	Latin	Alphabet
Hindi	High	Brahmic	Abugida/Abjad
Hungarian	Low	Latin	Alphabet
Indonesian	Medium	Latin	Alphabet
Irish	Low	Latin	Alphabet
Italian	High	Latin	Alphabet
Japanese	Very Low	Hanzi	Picto-/Ideographic
Korean	High	Hangul	Alphabet
Latvian	High	Latin	Alphabet
Modern Greek	High	Greek	Alphabet
Norwegian	Medium	Latin	Alphabet
Pashto	Medium	Arabic	Alphabet
Portuguese	Medium	Latin	Alphabet
Russian	High	Cyrillic	Alphabet
Scottish Gaelic	Low	Latin	Alphabet
Spanish	High	Latin	Alphabet
Swedish	Medium	Latin	Alphabet
Turkish	High	Latin	Alphabet
Vietnamese	Low	Latin	Alphabet
Welsh	High	Latin	Alphabet



# Reviews





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**Zoltán Dörnyei, Katerina Mentzelopoulos,  
*Lessons From Exceptional Language Learners  
Who Have Achieved Nativelike Proficiency:  
Motivation, Cognition and Identity*  
Multilingual Matters, 2022, xviii + 196 pp.**

The reviewed volume, *Lessons From Exceptional Language Learners Who Have Achieved Nativelike Proficiency: Motivation, Cognition and Identity*, by Zoltán Dörnyei and Katarina Mentzelopoulos, forms part of the series in the Psychology of Language Learning and Teaching (Multilingual Matters). One of the world's leading figures in applied linguistics, Zoltán Dörnyei was Professor at the University of Nottingham (United Kingdom) before his untimely passing in the summer of 2022. Accordingly, as one of his last works, the current volume opens with an *in memoriam* by his co-author and doctoral student Katerina Mentzelopoulos, where she pays tribute to the scholar and the man whom she and many others held in such high esteem.

Though it of course depends on the context and type of interaction, one of the most appreciated accolades received by non-native L2 learners is to be unexpectedly mistaken for a native speaker. Indeed, with native-level proficiency often seen as the pinnacle of linguistic achievement by many language students and their teachers, it is perhaps surprising that research relating to the psychological and developmental features of such highly-skilled language learners has attracted scant attention from the scholarly community (Dörnyei & Mentzelopoulos, 2022, p. xii).

The work's Introduction outlines the origin and novelty of the idea which led to the research project as well as information regarding the basic selection procedure for the interviewees (for example, heritage language learners were ineligible, as were learners who had mastered an L2 that they had been surrounded by during their childhood/teenage years). In addition, some preliminary

remarks on the broad approach taken over the course of the subsequent twelve chapters are also given. Noting the wealth of participant data obtained during the study, the Introduction also contrasts the reviewed work's more analytical approach to motivation, cognition, and identity with the more narrative-based approach taken in its interconnected yet independent companion volume (Mentzelopoulos & Dörnyei, 2022), which centres primarily on the voices and stories of these exceptional language learners.

The first three chapters provide the necessary background and context which are the foundation for the study. As such, Chapter 1 locates the analysis within the framework of past research on these exceptional learners. Acknowledging previous work done from a linguistic perspective, the authors then review the relevant literature on previous psychological and developmental studies pertaining to the processes, limitations, and characteristics of these nativelike learners. This is supplemented by an overview of other research that exceptional learners have participated in, but where their nativelike skills have not been the major focus (for example, in studies exploring the Critical Period Hypothesis or in more general research on aptitude and talent within language learning).

The second chapter outlines the methodological approach undertaken, with information on how the interviewees were obtained, as well as information on how the qualitative data was collected and analysed. Comprehensive demographic and linguistic information regarding the 30 participants is presented in a convenient table (Dörnyei & Mentzelopoulos, 2022, pp. 23–26) which is a useful point of reference as the book progresses. With the title of the book explicitly referring to the concept of nativelikeness (and by extension, to the native speaker, Chapter 3 tackles this at-times contentious aspect by considering relevant interpretations of this concept as presented in the theoretical literature as well as by the study participants themselves. Indeed, a subsection of this chapter (Dörnyei & Mentzelopoulos, 2022, pp. 35–39) focuses on the interviewees' own perception of those instances where they had been assumed to be native speakers of the L2.

The next seven chapters shine the spotlight firmly on the participants in this study, each adopting a similar structure of first presenting the salient aspects, before a closing discussion subsection provides additional analysis. This is supplemented by text boxes (ranging from half a page to a whole page in size) which present short examples taken from the relevant experiences of a given interviewee. In Chapter 4, entitled *A Favourable Set-Up*, the importance of environmental factors is underlined, including indirect and direct linguistic exposure through the media, family connections, as well as to broader social and societal aspects including globalisation and the seeming ubiquity of English encountered in certain non-Anglophone countries. Chapter 5 outlines how participants developed a bond with the selected L2, discussed as “one of the most important productive features” (Dörnyei & Mentzelopoulos, 2022, p. 44)

of the interviewees' narratives. Indeed, some of the different aspects which were presented and discussed included cultural sources such as literature and music, direct contact with the L2 and its speakers, as well as practical reasons such as education, leisure, or socializing. For some, this could even comprise grammatical or script-related characteristics of a given language.

The sixth chapter shifts towards a cognitive focus, where the authors present and discuss various factors relating to personality, motivation, success, and so forth, also making the interesting observation that aspects of the study did not fully align with traditional approaches to language aptitude. Chapter 7 examines nativelike pronunciation, examining it through various lens (e.g., via the L1, family influence, mimicry, musical training, social benefits, etc.). In analysing this phenomenon, the authors also posit that the lower priority of pronunciation in traditional L2 pedagogy may be the reason why many L2 learners might not realize their full capabilities in this area (Dörnyei & Mentzelopoulos, 2022, p. 104). Chapter 8 highlights the efforts made and strategies employed by these nativelike learners to achieve their skills, including even by those who seemingly absorbed the L2 in a spongelike fashion. In this regard, the importance of creativity and awareness within learning patterns is also presented. As such, the authors observe that there are multiple "approaches that can lead to successful learning, provided that one takes a flexible approach" (Dörnyei & Mentzelopoulos, 2022, p. 114). In the ninth chapter of the volume, Robert C. Gardner's (1985) theory of language learning motivation is used as a springboard for exploring personal and professional relationship-related and social aspects of these exceptional language learners. Dörnyei's (2020) framework is used to structure Chapter 10 of the volume, which examines the source of the persistence that the interviewees drew upon during their language-related quests. Using several automotive analogies as a metaphor (i.e., that the language learning journey is similar to going on a lengthy trip by car), this chapter presents the participants' experiences and insights accordingly.

In the penultimate chapter, the focus is on how interviewees view themselves within the context of their L2 proficiency, as the title Confidence, Comfort, and Ownership suggests. Chapter 12 highlights the concept of identity, the third element of the book's subtitle. Through analysing this multi-layered and often blurred notion, the authors seek to understand what "membership in the highly selective club of nativelike second language L2 speakers" (Dörnyei & Mentzelopoulos, 2022, p. 154) signifies to the interviewees. The book's conclusion draws together the various strands of motivation, cognition, and identity, and distils the insights gained through the study into eight succinct and impactful points.

In terms of dimensions, *Lessons From Exceptional Language Learners Who Have Achieved Nativelike Proficiency: Motivation, Cognition and Identity* comes in at 196 pages of text, including an appendix containing the interview

questions as well as a list of the over 250 works cited and an index, with more information regarding the participants' own narratives contained in the companion volume (Mentzelopoulos & Dörnyei, 2022). As has been outlined above, the book is concise, clearly-structured, and extremely well-thought out, with chapter subheadings making the volume suitable for dipping into and out of as needed. Indeed, the breadth and depth of the new perspectives contained in the work mean that this volume is highly recommended for all scholars interested in any aspect of applied linguistics and second language acquisition. In the opinion of this reviewer, it would also be of relevance for language teachers and for any advanced language learners seeking to gain academic perspectives on how to proceed beyond the CEFR C2 level (for example, student interpreters seeking to improve a return language). Hence, *Lessons From Exceptional Language Learners Who Have Achieved Nativelike Proficiency: Motivation, Cognition and Identity* is a ground-breaking work with immense potential to influence the future scope of research in this valuable and important area.

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## STYLE GUIDE FOR THE AUTHORS

Please note that we are changing from APA 6th edition to newer 7th edition. Authors are requested to submit manuscripts formatted in APA style (*American Psychological Association*, 7th ed.).

All manuscripts must include an abstract in English (maximum of 250 words). After the abstract please provide keywords.

Main text: 12 Times New Roman

Long citations (more than 40 words): 10 Times New Roman, indent by 1 tab either side, one empty line above and below, no quotation marks.

1.5 spacing

### Format of headings

The following table demonstrates how to format headings in APA Style.

Level	Format
1	<b>Centered, Bold, Title Case Heading</b> Text begins as a new paragraph.
2	<b>Flush Left, Bold, Title Case Heading</b> Text begins as a new paragraph.
3	<b><i>Flush Left, Bold Italic, Title Case Heading</i></b> Text begins as a new paragraph.
4	<b>Indented, Bold, Title Case Heading, Ending With a Period.</b> Text begins on the same line and continues as a regular paragraph.
5	<b><i>Indented, Bold Italic, Title Case Heading, Ending With a Period.</i></b> Text begins on the same line and continues as a regular paragraph.

*Note.* In title case, most words are capitalized.

### In-text citations (examples):

#### Author's name and date in brackets:

The experience of critical incidents and effective reflection upon them allows teachers to control their classroom actions more consciously and create critical events (CE's), which were described earlier as intended, planned and controlled (Woods, 1993).

Woods (1993) believes that critical events are structured and occur in well-defined staged of conceptualization . . .

#### Two authors:

(Ballantyne & Packer, 1995)

As Ballantyne and Packer (1995) demonstrate ...

#### Three authors:

(Barker, Callahan, & Ferreira, 2009)

#### Subsequent use:

(Barker et al., 2009)

**Six authors or more:**

Lorenz et al. (1998) argued...  
(Lorenz et al., 1998)

**Authors whose last names are the same:**

(D. Francis, 1985; H. Francis, 2004)

**Online sources (unpaginated), provide paragraph or section title instead:**

(Peterson & Clark, 1978, para. 4)  
(Moss, Springer, & Dehr, 2008, Discussion section, para. 1)

**No author, provide shortened title:**

("Primary Teachers Talking," 2007)  
(*Reflective Practice*, 2005, pp. 12–25)

**Secondary citations:**

Smith (as cited in Maxx & Meyer, 2000) noted that "there is . . . ."

**Citation within citation:**

As it has been noted that "there is no relevance . . . (Smith, 2005)" (Maxx & Meyer, 2000, p. 129).

**& vs. and:**

As Smithson and Stones (1999) demonstrated. . .  
. . . as has been shown (Smithson & Stones, 1999) . . .

## References

**Selected examples (for more consult APA manual 7th ed.):****Book, one author:**

Goldberg, A. (2006). *Constructions at work*. Oxford University Press.

**Book, two authors and more:**

Jarvis, S., & Pavlenko, A. (2008). *Crosslinguistic influence in language cognition*. Routledge.

**Translated book:**

Freud, S. (1960). *Jokes and their relation to the unconscious*. (J. Strachey, Trans.). Routledge & K. Paul. (Original work published 1905).

**Edited book:**

Flowerdew, J., Brock, M., & Hsia, S. (Eds.). (1992). *Second language teacher education*. City Polytechnic of Hong Kong.

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Goldberg, A., & Casenhiser, D. (2008). Construction learning and second language acquisition. In P. Robinson & N. C. Ellis (Eds.), *Handbook of cognitive linguistics and second language acquisition* (pp. 197–215). Routledge.

**Article in a journal:**

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**Conference proceedings:**

- Souleles, N., & Pillar, C. (Eds.). (2014). Proceedings from the *First International Conference on the Use of iPads in Higher Education*. Paphos: Cyprus University of Technology.

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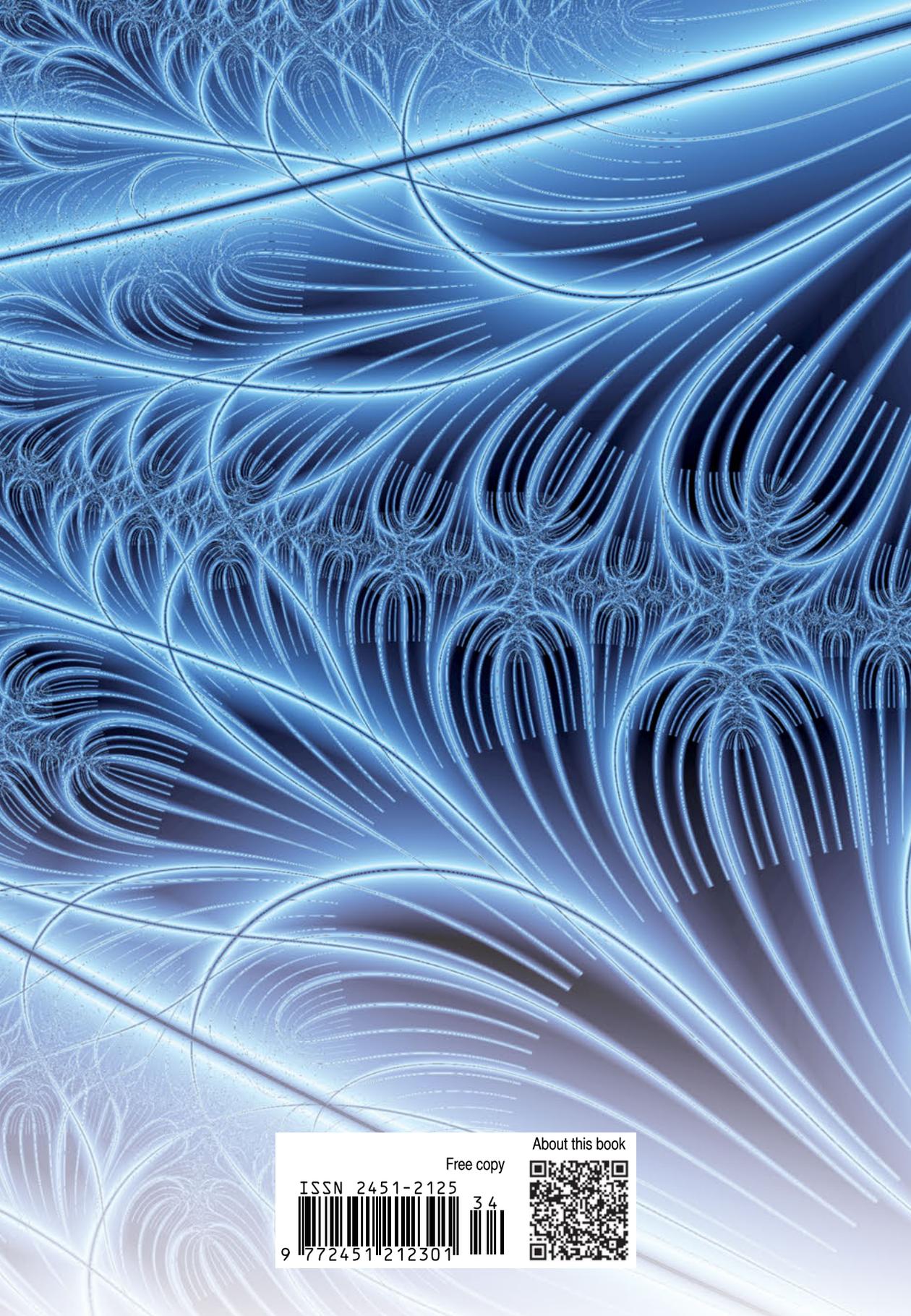
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