

CHAPTER 2: LITERATURE REVIEW AND THEORETICAL FRAMEWORK

2.1 Introduction

The intent of this chapter is to summarize the findings of the literature review on the subject of medium-of-instruction policy implementation in the school system. I will also establish what is known through the research corpus about the relationship between policy and practice with respect to medium-of-instruction in contexts where the MOI is a second language, determine the limitations, gaps and contradictions within the literature on medium-of-instruction, and then justify my research in terms of what it would add to the knowledge base on medium-of-instruction, especially in the context of developing countries.

2.2 The Medium-of-Instruction Debate

2.2.1 African Languages Should Be Used As MOI in Post-colonial Contexts

Scholars have taken different positions on medium-of-instruction in post-colonial contexts. The main argument advanced by indigenous language advocates in this debate is that the learners' home languages are not in themselves deficient and can function as languages of instruction from the first grade to university (Prah, 2003:23). Scholars who hold this view approach the medium-of-instruction debate from the perspective that multilingualism is a resource, not a problem (Heugh, 1992:3). To counter the argument that multilingualism is expensive, Prah (2003:24) suggests that orthographies can be harmonized to ensure large-scale development of materials and to counter "missionary linguistic fragmentation of the ethno-linguistic field." Countries would then benefit the mass development of materials by sharing production costs and expertise. In the same vein, Alexander (1989:75) proposes that varieties of Nguni (Zulu, Xhosa, Swat, and Ndebele) and Sotho (Southern Sotho, Northern Sotho, and Tswana) can and should be standardized or unified in writing and in all formal domains such as school, church, courts, etc. Alexander bases his proposal on the Zimbabwean situation in which a number of dialects (Karanga, Manyika, and Zezuru) were unified and collectively referred to as Shona. Shona, the harmonized language, is employed in all official documentation. However, a counter-view to this suggestion is that the Zimbabwean example, on which Alexander based his proposal, is not quite

comparable to the South African situation. In Zimbabwe, they were dealing with varieties within the same language, whereas in South Africa it would be more appropriate to talk about unifying isiXhosa with its dialects, such as siMpondo, siHlubi, siXesibe, siMfengu, etc (Zotwana in Alexander, 1989:76).

Dewa (2010) approaches the language question from a developmental perspective by arguing that the wealth of traditional knowledge on medicine, health practices and agriculture that Africans possess must be brought into mainstream science and technology. This could be achieved by making science, which has so far been an English language-based pursuit, accessible to Africans through local languages. To address pressing developmental issues on the African continent, it is imperative that African countries invest in such services as translation activities, including compiling dictionaries and hiring people with specialist communication skills such as integrators, filters and synthesizers, to translate and summarize science and technology ideas in local languages.

2.2.2. English Should Remain the Main Medium-of-Instruction in Post-colonial Contexts

Another position taken by scholars is that English should be employed as MOI because it is not the root cause of academic difficulties experienced by learners, and that learners who under-achieve would do so in any language (Kadegde, 2003:177). De Klerk (2002: 29-30) argues that in the case of South Africa, “claims framing first-language maintenance as a linguistic human-rights issue are inadequate because mother-tongue education and mother-tongue promotion in South Africa have been used for purposes of exclusion,” and for this reason, mother-tongue education remains a highly contested subject. Kadegde (2003:177) argues that English should remain the language of teaching and learning in Tanzania, as shifting to native languages would marginalize the majority from the economy and close possibilities for upward mobility. Researchers from Language of Instruction in Tanzania and South Africa (LOITASA) dispute this view on the grounds that the Kiswahili tests used by Kadegde purposely employed technical terms which were unfamiliar to the learners, even though their command of Kiswahili was good (Brock-Utne, Desai, Qorro, 2003:177).

Contrary to Kadedge's view, English has been identified as a contributory factor in learner achievement in many small-scale studies carried out in South Africa and in other countries (TIMSS, 1998-1999; Simkin & Paterson, 2005; Threshold Project Report, 1990; Grade 6 Intermediate Phase Systemic Evaluation Report, 2005; Howie, 2002; Desai, 2003; Mwinsheike, 2003; Brock-Utne & Holmarsdottir, 2003; Yan, 2003; MacKay & De Klerk, 1996; Broom, 2004; Schlebusch, 2002; Malekela, 2006; Qorro, 2006; and Yohannes, 2009).

2.2.3. Proposed Solutions to the Language of Instruction Question

On the complex question of medium-of-instruction in African education, Alexander (1989) suggests a gradual transition model for South Africa. He proposes that initial learning should be in the mother tongue and that English be introduced gradually as an MOI in most subjects, subject to the availability of adequate teaching-learning materials in indigenous languages and teachers trained in these languages. Alexander (1989:67) contends that only when these conditions have been met, will the balance between English and indigenous languages change. In support of his proposal for a gradual transition model as an interim solution, he argues that the attrition rate in Matric is directly related to the language question and that a more efficient strategy would be to adopt a first or home-language medium or promote an additive bilingual approach to schooling. This would afford learners access to effective acquisition of English, while African languages were being intellectualized for high-status functions of society. An additive bilingual model emphasizes the importance of developing initial literacy in the LI and then gradually introducing an L2 alongside the L1. Makalela (2005) and Prah (2005) view the harmonization of African languages as a long-term solution to the language question in African contexts.

Heugh (1995:46) is critical of the continued use of English in African countries as languages of teaching and learning, contending that English Second Language (ESL) education in the form of subtractive and transitional models is likely to fail in South Africa for the following reasons:

- knowledge and experience acquired in the home environment are not affirmed by the school, since the child is taught in a language that is not his/her home language;
- the cognitive development of the child is disrupted with the switch to a second language (L2), even before adequate proficiency has been acquired in the first language (L1);

- the promotion of a second language is at the expense of the learner's first language (L1).

Subtractive and transitional models use the LI as a bridge to English by ensuring that the LI skills acquired by the learner form the basis for learning an L2. Heugh (2000) is of the view that the economic viability/functionality of African languages needs to be unmasked and recovered in education and beyond schooling in order to ensure that they do not become extinct.

Harlech-Jones (1997:243) criticizes the “uncritical acceptance” of English in Namibia and proposes that indigenous languages, which are currently disregarded or taught uncreatively, be employed as MOI. He proposes that factors such as school variables should be taken into account in order to ensure that language policy and practices in education promote academic success. These factors include the many under-qualified teachers who have low proficiency levels in English, the lack of resources such as library books, the need for Namibia to reduce inequalities and maximize opportunities, and the fact that English is not a lingua franca in Namibia and is not spoken in the communities where the children live.

Finlayson and Madiba (2002:1) also argue for the creation of a demand for new terminology by using African languages as MOI. Carstens (1998:01) maintains that factors such as failure to facilitate scientific knowledge using an L2, the existence of an extensive stock of technical terms in African languages, and the positive attitudes of teachers, particularly in rural schools, towards the use of the LI as LOLT are indicators that the time is ripe for South Africa to achieve the ideal of terminologisation, i.e. the development of subject-related terminology in the mother tongue. Research conducted by Manyane in 1998 in the Northern Province also validates the claim for terminologisation. Manyane's research showed increased pass rates in Physical Science in schools where the MOI matched the learners' home language, as compared to schools in which there was a mismatch between the LI and the LOLT. Prah (2003:21) cautions that failure to use African languages as media of instruction is the surest way of ensuring extinction of these languages. In the same vein, Brock-Utne (2001:118) and Reagan (2001:63) argue that the language shift towards English in countries like South Africa and Tanzania will only entrench social inequalities and continue to disadvantage the poor and benefit the élite, because the language question is all about power.

Other scholars emphasize the importance of context in the MOI debate. Desai (2001:323) asserts that language plays a central role in enabling citizens of a country to participate in all spheres of life, economically, socially and educationally, and that a two-pronged approach is needed to ensure success and access to education, and to meet the demands of globalization. This would necessitate employing colonial and indigenous languages as media of instruction (Desai, 2003:47). She maintains that only when African languages are used in high domains such as education will they develop and empower their speakers (Desai, 2000:178).

In addition, Desai (2003) proposes a case for mother-tongue instruction in monolingual contexts because of the difficulties that learners experience from being taught in an L2. Desai based her proposal on the findings of a contrastive study she conducted for her doctoral research in a Khayelitsha primary school near Cape Town in 1998. Her subjects were taken from four classes, two from Grade 4, the other two from Grade 7. The Grade 4 class was taught in English for the first time, while the Grade 7s had been exposed to English for three years. All the subjects who participated in the study were first-language Xhosa speakers. The study found that in every class, performance was better in the Xhosa version. Learners performed poorly in the reading comprehension exercise in both languages, but the Xhosa version showed better clarity, even in cases where the responses were incorrect. Learners who performed well in English did not necessarily perform well in isiXhosa, nor did their performance in the expository task show any significant improvement in Grade 7. The English version was full of spelling and grammar errors, and learners did not answer the questions. Generally, subjects struggled to express answers in English. According to Desai (2003: 61), their proficiency was nowhere near the requirements for using it as a sole language of learning and teaching (LOLT). The isiXhosa version showed fewer grammar and spelling errors and learners attempted to answer the questions. The response was written in good language and was a reflection of what was in the picture. Subjects who took the test in English scored lower marks than those who were tested in isiXhosa. Desai's study presents compelling evidence that studying in a second language is a complicated process. Desai (2003:62) contends that in linguistically homogenous environments, such as Khayelitsha, it makes more sense for the learners to be taught in their first language, at least until the end of Grade 7.

De Klerk and MacKay (1996: 218) highlight the importance of developing the eleven official languages in South Africa in order to reap the cognitive benefits of mother-tongue instruction. The Molteno Project based its literacy programmes, Bridge to English and Breakthrough to Literacy, on a language-experience approach grounded on the principles of learner-centredness and initial first-language proficiency. Learners could understand, read and write both in their mother tongue and in English with effortless ease, thus proving to some degree the argument that literacy skills acquired in the first language can be transferred to a second-language learning situation (Kingwill, 1998:26). However, longitudinal studies of learners who were recipients of the early exit models on which the Molteno programme was based, hardly showed any gain with regard to overall proficiency in English (Hassana, Brock-Utne, Diallo, Heugh, Wolff, 2006).

In the case of Tanzania and South Africa, where safe talk, code-switching and code-mixing were employed extensively, Brock-Utne (2005:563) recommends the three-language model put forward by Maurice Tadadjeu (1989) as a solution to the language question. This model proposes that learners first acquire proficiency in the mother tongue. Thereafter, they can learn a regional African language which will be adopted as an LOLT at secondary and tertiary levels. An international language such as English would then be offered in the education system as a subject, at the same time that the regional language was introduced as an LOLT at secondary and tertiary levels. An advantage of this model is that it makes it possible for the school to affirm the home /local language as well as the language of wider communication (regional language), while introducing the so-called international language at a much later stage in the learner's life when the initial literacy skills in the LI have developed fully. In the interim, whilst African languages are in the process being intellectualized, Brock-Utne recommends that code-switching be used as a teaching-learning resource. For example, teachers could use it to facilitate learning and permit learners to respond to examination and test questions in either the local, regional or foreign language. Qorro (2009) argues that teaching and learning should be done in languages in which both teachers and learners are proficient, not a foreign language. Using an African language in a post-colonial context as MOI would eliminate pupil exposure to wrong English during lesson delivery, improve student understanding of content, eliminate dependence on English, and reduce the burden placed on subject teachers when they are also expected to assist in the development of English language skills (Qorro in Brock-Utne, 2005).

2.3. Synthesis of Current Literature on the Subject of Medium Instruction: Patterns and Trends

Literature on medium of instruction can be classified in the following categories: literature which seeks to explain and understand the effects of L2 education (Schlebusch, 2002; Broom, 2004; Howie, 2002; MacKay & De Klerk, 1996; Threshold Project report, 1990; Qorro, 2006; Malekela, 2006; Brock-Utne, 2006; Lomofsky & Stofile, 2006); teacher, parent and learner attitudes towards indigenizing the LI and employing it as media of instruction (Mfum-Mensah, 2005); and LIE policy implementation, including code-switching and language choice (Muthwii, 2001; Probyn, 2001; Adendorff, 1993; Chick & MacKay, 2001; Setati, Adler, Reed, Bapoo, 2002; Setati & Adler, 2000; Brock-Utne, 2005; Merrit, Cleghorn, Abagi, & Bunyi, 1992). The scope of this review is, however, limited to MOI policy implementation, including code-switching and language choice.

2.3.1 Identified Gap in the Literature on MOI Policy Implementation

A major limitation of the literature is that, although there has been a lot of theorizing on the subject of medium-of-instruction policy, there are few classroom-based accounts on how high school teachers in particular implement language policies in post-apartheid South Africa. The literature is limited in that it covers teacher language practices in a few learning areas at secondary school level, notably case studies in Mathematics and Science. These were conducted in multilingual township schools and racially desegregated primary and secondary schools. There is a deafening silence on the topic in monolingual rural and urban (township) high schools where the medium of instruction is English.

The case studies on medium-of-instruction policy implementation focus mainly on code-switching as a teaching/learning strategy that is commonly used in primary and secondary multilingual contexts where teachers who share a home language with their learners, teach in a second

language. This research will not focus exclusively on code-switching, but will also consider teacher language choices, classroom interaction, and teaching and learning as they occur in English, Business Economics and Geography classrooms in rural and urban high schools in the predominantly rural Eastern Cape Province.

2.3.2 Code-switching in Different Contexts

Baker (1993:76-77) provides the following definition of code-switching: “Code-switching is when an individual (more or less deliberately) alternates between two or more languages...Code switches have purposes...There are important social and power aspects of switching between languages, as there are between switching between dialect registers.”

Myers-Scotton (1993:3) defines code-switching as “the selection by bilinguals or multilinguals of forms from an embedded variety (or varieties) in utterances of a matrix variety during the same conversation.” Myers-Scotton (1993:3-4) asserts that code-switching can be inter-sentential or intra-sentential and that inter-sentential code-switching “involves switches from one language to the other between sentences: a whole sentence (or more than one sentence) produced entirely in one language before there is a switch to the other language(s) in use in the conversation,” while intra-sentential code-switching takes place within the same sentence or sentence fragment.

Brock-Utne (2005) asserts that code-switching is generally looked upon positively, as opposed to code-mixing (inter-sentential change) which is regarded in a negative light. Code-mixing is an indication of a lack of competence in both languages, while code-switching is a strategy that speakers with a good command of either language use to promote understanding of content during lesson delivery. Myers-Scotton (1993) argues that code-switching is not necessarily a reflection of poor language skills on the part of the speaker, but on the contrary results from complex bilingual skills.

The literature presents code-switching as a valuable tool which teachers use to mediate learning (Adendorff, 1993; Slabbert & Finlayson, 1999; Moyo, 2000; Setati et al., 2002), particularly in situations where learners have limited proficiency in the official language of instruction. In

township schools, code-switching is widely accepted by teachers, school administrators and the Department of Education (Holmardottir, 2006:206). It is in racially desegregated South African schools that resistance to code-switching has been identified (Chick & McKay, 2001). Code-switching functions include making the curriculum accessible to learners, facilitating classroom management, eliciting student response, and promoting interpersonal communication (Holmarsdottir, 2006:204-205). Some researchers further argue that the introduction of outcomes-based education in South Africa necessitates the employment of code alternation practices (which include code-switching) in situations where English is learned whilst simultaneously being used as an LOLT (Setati, Adler, Reed, Bapoo, 2002:77).

Some researchers regard code-switching as a coping strategy which teachers adopt to save face, i.e. mask their own linguistic deficiencies in English (Arthur, 1996). Alderson and Landbury (1990) observed in Tanzanian secondary school science classes that code-switching was used as a coping strategy when teachers had problems expressing themselves in English or when the learners had problems understanding the teacher. Osaki (1991) observed that learners with limited proficiency in English would contribute minimally in class discussions and would code-mix, with the result that teachers who insisted on English only ended up talking to themselves and not getting much input from learners. Qorro (2003), Brock-Utne and Holmarsdottir (2003) regard code-switching as a compensatory strategy for masking inadequate competence of teachers and learners in the target language/s. Arthur (1996:43) argued that the adoption of an L2 as a medium of instruction in Botswana inhibited teaching and learning, and that code-switching into the mother tongue of the learners by most teachers was a face-saving exercise. Consequently, the mother tongue functioned as a language of complicity. According to Pontefract and Hardman (2005:100), current classroom discourse practices in Kenyan primary classrooms do not support the learners' linguistic and cognitive learning because of the adoption of a foreign language as MOI. Ferguson (2002) and Martin-Jones (1995) are sceptical about the value of code-switching, especially in cases where English is taught as a subject and the aim is to improve the learners' overall competence in English.

Studies conducted on language use in the school system before 1997 point to the pervasive use of this strategy for teaching and learning, particularly in L2 contexts (Adler, 1998; Adendorff, 1993).

These studies, together with those conducted after 1997 in South Africa, reveal that teachers who shared the same home language with their pupils used code-switching extensively in their teaching to facilitate learning and understanding and also to make up for their pupils' linguistic insecurities (Adler, 1998; Adendorff, 1993; Probyn, 2001). In cases where the teacher shared the same LI as the pupils, most of the teaching was done in the LI (i.e. the shared language between teachers and pupils), thus making the learners' first language the *de facto* medium of instruction (Brock-Utne & Holmarsdottir, 2003; Setati & Adler, 2000, Setati et.al, 2002). Code-switching was employed most during group work to facilitate teaching and learning (Mwinsheike, 2003:91; Setati & Adler, 2000:254).

The studies conducted by Setati and Adler (2000), Probyn (2001), and Chick and MacKay (2001) attest to the importance of context and resource provisioning in medium-of-instruction policy formulation and implementation. Setati and Adler (2000) reported extensive code-switching in secondary Mathematics classrooms, as compared to switching practices in primary Mathematics classrooms, and greater use of code-switching by teachers and learners in second-language learning environments than in foreign language learning environments. Code-switching in urban primary multilingual schools was found to be a dominant practice because of the multilingual profile of the classes (Setati & Adler, 2000:259).

Language issues in rural schools where there was very limited support for English medium instruction were found to be quite complex (Setati & Adler, 2000:255). According to Setati and Adler, the rural teachers' insistence on the use of English in the teaching-learning environment could be explained by the fact that they perceived themselves as the primary role models of English for their pupils. The Further Diploma in Education (FDE) program, which introduced the participants in the study to participatory and learner-centred methods of teaching, influenced their classroom practice and language behaviour, particularly code-switching (Setati & Adler, 2000: 255). A study conducted by Adler in 1992-1993 revealed that, although the medium of instruction remained English in South African secondary schools, indigenous languages complemented English to facilitate concept development and promote mathematical communicative competence. According to Adler (1998: 25), although teachers in black township schools believed that the best way to acquire English was to use it as an MOI, code-switching was most prevalent where the

teacher and many pupils shared a main language. The teachers' dilemma was that "they did not know how to help pupils whose expression was poor" (Adler, 1998:25). Also, their concerns about access to English, the language of power, and equity issues resulted in the teachers experiencing conflict about code-switching (Adler, 1998:26). In multiracial classes, mathematical language teaching which gave explicit instructions and explanations was found to benefit all the learners, including those whose first language was English (Adler, 1998: 25).

In the light of the findings of their studies in Mathematics education, Setati and Adler (2000:265) proposed that curriculum programmes be tailored according to context, i.e. whether they were in English Additional Language or English Second Language or within a primary or secondary context. Setati and Adler (2000:265) caution that overlooking contextual factors could "unintentionally exacerbate educational inequalities." A range of uses of code-switching were evident in township schools. Teachers code-switched in repeating a question, in classroom discipline and management, in emphasis, in drawing attention to a point, in prompting, probing and scaffolding students' responses, in building confidence, in inviting learner participation and understanding, and for affective purposes (Probyn, 2001).

Adendorff's 1993 classroom-based research, which was on code-switching as a communicative resource used by teachers and learners who shared the same L1, in this case Zulu, revealed a number of uses of code-switching. In the English lesson, code-switching constituted a meta-message, "an attempt on the teacher's part to gain credibility from his pupils." Other functions fulfilled by Zulu were direct translation, paraphrasing, and academic and social functions. IsiZulu also emerged as a "language of provocation" and was used by the teacher to encourage learner participation and foster teacher-pupil unity. In the Biology lesson, code-switching was used for different purposes to those identified in the English lesson. It was used for advance marking of key terms, as a means for checking pupils' understanding, to mark solidarity with the pupils and to express implicit encouragement of the pupils. In the Geography lesson it was used for exercising classroom management and achieving academic and social functions, while the principal used it for paraphrasing his message, listing items, reiterating important information and as a focusing device (Adendorff, 1993:146-152). Although Adendorff's study provides valuable insights into code-switching, its findings cannot be generalized because of the size of the sample

selected. A major methodological weakness of the study was that data were collected and recorded surreptitiously by a teacher at the school who helped interpret it with other teachers.

Merritt, Clegghorn, Abagi, and Bunyi (1992:105), who also reported extensive code-switching, variation and repetition during lesson delivery in Kenyan primary schools, maintain that the determinants of language use and code-switching are more complex than could be “legislated” by language policy on MOI. Their study revealed that teacher language practices, such as translation, repetition, code-switching and modality splitting, are educationally appropriate strategies which teachers and learners employ to negotiate meaning. However, Brock-Utne and Holmarsdottir (2003:92) found that translation slowed down the lesson, as learners did not pay attention to the language spoken by the teacher since they knew that the information would be repeated in their L1. Martin (2004:3) found that translation did not necessarily aid learning or promote classroom interaction in a primary school environment.

Mwinsheike’s 2003 study on the use of Kiswahili as a medium of instruction in Tanzania revealed a remarkable gap between teachers’ beliefs about their role and what actually happened in practice. Although the official language policy was that English should be used as medium of instruction at secondary school, teachers and pupils used Kiswahili extensively during classroom interaction. 89% of the teachers admitted to using Kiswahili, while 10% claimed they used English only. Over half the number who claimed to be using English only still used Kiswahili in their lessons. Teachers who taught in English tried very hard not to code-switch. According to Mwinsheike (2003:138-139), the effects of teaching in a second language were that the teachers were very tense and their verbal expressions were rather dry as opposed to those of teachers who taught in Kiswahili who were more relaxed and confident and appeared to enjoy what they were doing. In particular, teachers employed Kiswahili to clarify difficult concepts during lesson delivery.

Learners used Kiswahili extensively during discussions to ask questions and answer teachers’ questions. They lowered their voices in the presence of the observer, thus suggesting that they were experiencing guilt about using their home language for learning subject matter. The use of English in Science lessons hampered pupil participation immensely; those who were taught in

English only were very inactive during the lesson, and it was only when they worked in groups that they participated actively in the lesson. As reasons for the learners' non-participation, the teachers cited poor command of English, language problems, lack of interest in Science subjects, and lack of laboratory equipment and chemicals (Mwinsheike, 2003:138). Learners performed better in questions which did not require long explanations and performed poorly in those which required long and analytical explanations (Mwinsheike, 2003:140), possibly because the language of instruction constrained them. This was a similar finding to that of the TIMSS 1998-1999 study with respect to South African L2 learners of English and their performance in Mathematics. Some learners in Mwinsheike's study even answered questions correctly in Kiswahili, though they knew this was unacceptable. Mwinsheike's study confirmed the finding of seminal studies on medium of instruction by other LOITASA researchers that English is a barrier to learning in Tanzania and South Africa. Mwinsheike (2003:142-143) attributed poor performance of learners to the poor command of teachers and pupils in English, difficult and ambiguous questions that the teachers asked, and the fact that pupils were not given enough time to answer the questions.

Research emerging from Tanzania and South Africa on MOI also reveals that teachers use code-switching and translation extensively in both countries as coping strategies in the classroom (Brock-Utne & Holmarsdottir, 2003:90). Holmarsdottir's research at a school in Khayelitsha in Cape Town revealed that the entire Mathematics lesson was carried out in isiXhosa, except for an initial attempt to use English. After receiving no response to questions, the teacher switched to isiXhosa and the remaining lesson progressed in isiXhosa only, with some minor code-mixing taking place. According to the project researchers, this was not an isolated case, as many of the lessons they observed were conducted in isiXhosa, even though learners were expected to use English. Holmarsdottir (2003) argues that a possible explanation for this is that the teachers' English language skills had not developed to a level which would enable them to use it as a medium of instruction.

The teachers in Holmarsdottir's study used English predominantly in the public domain and switched to the learners' main languages for re-formulation and interaction with individual learners or groups. Teachers who had not themselves mastered the colonial language of instruction resorted to "safe talk", code-switching and code-mixing (Brock-Utne, 2005:557). To

eliminate pupils' exposure to their teachers' at times wrong use of English, Qorro (2003:188) suggested that English should not be used as the sole medium of instruction in Tanzania, and that the teaching of English as a subject also needed improvement. Brock-Utne (1997:253) made a similar proposal for Namibia by suggesting that, instead of parents mistakenly thinking that the best way to learn English was to use it as a medium of instruction, a wiser choice would be to offer English as a subject and to strengthen the Namibian languages as languages of instruction. Brock-Utne (1997: 254) makes a number of suggestions for strengthening Namibian languages. These include making use of public information campaigns to stress the importance of using the mother tongue as a medium of instruction; multi-grade teaching in cases where learners have different home-languages; comparative studies involving LI and L2 teaching; and public information campaigns for principals on the importance of the mother tongue as the medium of instruction.

Observations made in other schools which participated in the LOITASA research project also revealed a lack of fit between policy and practice with respect to medium of instruction. In one school, though the official school policy declared that the transition from isiXhosa to English should take place at Grade 4, in reality that was not the case. IsiXhosa was generally used for classroom interaction and this was accompanied by code-switching and code-mixing. Ostensibly, lessons were conducted in English when in fact, after teaching in isiXhosa, teachers would write sentences on the board in English and learners would then copy these sentences into workbooks (Brock-Utne & Holmarsdottir, 2003:90-91). Teachers delivered lessons mainly in the mother tongue or code-switched/mixed extensively to ensure that learners grasped the content and developed the necessary skills.

Alexander (1999) and Desai (2000) cite the negative attitudes of speakers of African languages as reasons behind the lack of promotion of African languages. Ironically, it is these languages (e.g. isiXhosa) that teachers in most black schools were found to be employing as media of instruction.

In South East Asian countries such as Hong Kong, language-in-education policy change has not produced the desired change in classroom practice. Evans (2009) states that in post-colonial Hong Kong a controversial medium-of-instruction policy was introduced in 1989 which compelled

hitherto English-medium secondary schools to change to Chinese-medium teaching. Only a few were permitted to continue using English only as LOLT, and code-switching had to be avoided when presenting content subjects. In practice, teachers in both Chinese and English streamed schools experienced difficulty in implementing the new policy in their classrooms. They used Cantonese and English interchangeably and in varying degrees, an indication that there was a huge gap between policy and practice in these schools. Evans cites low teacher and learner proficiency levels in English as the main reason behind the adoption of a mixed code in Hong Kong.

2.3.3 Factors Influencing Language Policy Implementation

The existing literature on LIE policy implementation reveals a range of factors underlying the inconsistencies and contradictions in the implementation (or non-implementation) of bilingual/multilingual MOI policies at classroom level. These have to do with resource provisioning or the lack thereof, the context in which the policy is implemented, teacher deployment policies, teacher training, teachers' linguistic insecurities, curriculum policies, perceptions and attitudes of teachers and parents towards indigenous languages, misconceptions about the choice of language of instruction, perceptions about the power of English, and admission policies (Muthwii, 2002; Merrit et al., 1992; Ando-Kumi, 1999; Setati, Adler, Reed, & Bapoo, 2002; Probyn, 2001; Setati & Adler, 2000; Setati, 2000). All the factors stated above can thwart efforts to implement MOI policies at the micro-level.

Some of the studies also reveal that school context, the teacher's home language and that of his or her pupils, teacher perceptions about using English as a MOI, and learner proficiency levels are important factors in medium-of-instruction policy implementation (Probyn, 2001). A qualitative research study conducted by Probyn in which she explored the perceptions and practices of teachers using the medium of English as an additional language (EAL) in township (ex-DET) high schools in South Africa revealed that, although they were expected to teach in English, they took into account the learners' limited proficiency levels and provided the necessary "scaffolding" their learners needed to make sense of subject content. Probyn found that the teachers' perception of English Additional Language (EAL) teaching was that it was an arduous, time-consuming and stressful task because the learners' proficiency in the language was extremely poor. As a result,

this constrained classroom discourse and interaction (Probyn, 2001: 256). Teachers used various supporting strategies to mediate learning. These included code-switching, using a simpler vocabulary, speaking more slowly, repeating a question and allowing a longer waiting time for an answer, drawing examples from the learners' own lives, using body language and visual aids. Some teachers, however, insisted on the exclusive use of English in class and kept reminding learners that tests and examinations would be written in English. All the teachers encouraged their learners to speak English in class, but when they responded in isiXhosa allowed this and assisted them in providing the correct response in English (Probyn, 2001:258-259). Taking into account the teachers' awareness of the challenges of studying in an L2, Probyn concluded that there were notable differences between the teachers' perceptions and their practice (Probyn, 2001:262).

The literature on LIE implementation also reveals that the attitudes, beliefs and perceptions of teachers and parents about languages have an impact on teachers' language practices and the implementation or non-implementation of medium-of-instruction policies (Probyn, 2001; Muthwii, 2001; Chick & MacKay, 2001). In Kenya and Uganda, parents and teachers were instrumental in the uneven implementation of the bilingual language policies in primary schools. Parents were against teaching in the mother tongue because they believed that their children already knew their own language, that it had no place in the curriculum, and that allowing for the use of the mother tongue would lead to too much code-switching and result in confusion (Muthwii, 2001:26). However, some teachers and parents in semi-urban contexts in Kenya supported formal instruction in the mother tongue, since some English words were new and unfamiliar to the learners (Muthwii, 2001:26).

Chick and MacKay (2001) conducted an ethnographic study in six racially desegregated schools in the Durban metropolitan, to investigate the extent to which the schools promoted the multilingualism and multiculturalism advocated in the 1997 official MOI policy. Their study highlighted a number of trends. They noted a preference for English, with a devaluing and stigmatisation of Zulu and of code-switching by principals and subject teachers. There were low levels of provisioning for Zulu, coupled with a perception by some teachers that Zulu was a threat to non-Zulu speakers. Younger teachers regarded code-switching as a resource, as opposed to the older and more conservative teachers who promoted an English-only discourse (Chick &

MacKay, 2001). Chick and MacKay's study reveals that in some racially desegregated schools, integration remains an ideal and an assimilationist policy is pursued vigorously through the schools' language policies.

Generally, empirical studies on MOI implementation at primary schools in Kenya, Ghana, South Africa and Uganda reveal that the implementation of bi/multilingual policies is problematic and results in a number of inconsistencies and contradictions during lesson delivery and assessment in the classroom situation. Martin (2004:3) observed an outright rejection of the multilingual MOI policy and a vigorous pursuit of monolingualism, especially in the primary school section in the Western Cape, though some teachers made an attempt at implementing the policy. Muthwii (2001:20-21) lists the practical constraints and misconceptions in the implementation of a bilingual policy at primary school level. These include resource provisioning or the lack thereof, support for English in schools, poor quality pre-service training, lack of science terminology in the mother tongue, the multilingual composition of classes, teachers' and parents' misconceptions about the choice of medium of instruction, and the context in which the school was situated. This resulted in urban and rural schools adopting different MOIs in both Kenya and Uganda.

The study by Muthwii (2001:16-17) concluded that teaching in the mother tongue at the primary school level presented the teachers with a number of challenges which arose partly because of the asymmetrical relationship between English and indigenous languages. There was a severe lack of books written in mother tongue, the teachers lacked competence in Kiswahili, the language they were supposed to use as a medium of instruction, with a limited vocabulary in the mother tongue. Examinations were not set in the mother tongue, even though learners were not competent in English. The existence of many dialects in the community made it difficult to choose the appropriate dialect form for school use. When pupils failed to understand subject content, teachers had no alternative but to revert to using the mother tongue. Parents refused to buy the few available texts in Kiswahili, discouraging their children from taking the mother tongue seriously because it was non-examinable at the end of primary school. And the school management team allocated only a few hours for mother-tongue instruction and teacher deployment policies

A 1999 study by Ando-Kumi from the University of Ghana, conducted in partnership with the Ministry of Education, set out to inform the language policy dialogue and to improve bilingual practices in primary education. It showed similar findings to those of Muthwii's. There was an uneven implementation of the bilingual policy in Ghana, with urban and rural primary schools using different media of instruction because of constraints such as an unsupportive language environment and teachers' negative attitudes towards indigenous languages. These attitudes and perceptions were shared by the parents. Rural schools implemented the policy, as opposed to those which had long-established school policies of early English medium. There were inconsistencies in the way in which different subject teachers implemented the bilingual MOI policy, with extensive use of code-switching. It was clear that multilingualism and the problems of dealing with children and teachers who spoke mutually unintelligible languages was not solely an urban phenomenon (Ando-Kumi, 1999:3-5). As a result of these challenges, teachers from both monolingual and multilingual schools chose English as a medium of instruction. Resources were available for them to teach in English, and they had been trained to teach in English, not in the mother tongue. Given the multilingual composition of their classes, there was a need to harmonize the multilingual groups (Muthwii, 2001:22-23). Merrit et al. (1992:103) maintain that the determinants of teachers' language choice and code-switching among English, Swahili and mother tongue in Kenyan primary classrooms are official school policy, embracing classroom management concerns, cognitive concerns, and values and attitudes about societal multilingualism.

2.4 Theoretical Framework

This research draws on the theory of English linguistic imperialism which Phillipson (1992: 53) regards as a distinct type of imperialism. What follows is an overview of Galtung's theory of imperialism from which Phillipson derives the theory of linguistic imperialism. Qualification analysis and Vygotsky's social constructivist theory, which form part of the theoretical framework, are also discussed.

The rationale for choosing the three frameworks for this study is that the critical theory perspective of linguistic imperialism explains how colonization shaped attitudes towards languages and led to the stigmatization and devaluation of African languages. In the education

arena, it provides an explanation on how political agendas have driven language policy planning and implementation. Social Constructivism and Qualification Analysis are underpinned by the understanding that education should be a collaborative event in which language is used effectively to promote cognitive understanding. The quality of interactions taking place in classrooms and the skills or “qualifications” acquired by learners serve as indicators of the quality of education offered in a country. By subjecting the lesson transcripts to social constructivism and qualification analysis, the researcher sought to understand how language is used to mediate learning in different school contexts. Code categories such as scaffolding, reciprocity, appropriation, proficiency, adaptability and creative qualifications, which form the building blocks of Qualification Analysis and Social Constructivism, were used to analyse the lesson transcripts.

2.4.1 English Linguistic Imperialism

Galtung posits six different but interrelated types of imperialism: economic, political, military, communicative, communication, and transport. According to Phillipson (1992:52), imperialism is driven by the four mechanisms: exploitation, fragmentation, penetration and marginalization. Imperialism and modernization, though purported to be mechanisms for development by powerful Western countries, have not brought about prosperity for the targeted or colonized countries (Phillipson, 1992:51).

According to Galtung’s theory, the world is divided into dominant Centres (i.e. the powerful Western countries) and dominated Peripheries. Both the Centres and Peripheries have powerful Elites who are linked by shared interests, in this case language. The relationship between the Centres and Peripheries is characterized by exploitation. Imperialism unfolds in three distinct phases. During the early colonial phase, the élites are colonizers. In the neo-colonial phase, powerful indigenous people, many of whom were educated in the centre countries through the centre languages, collaborate with inter-state actors and act as primary agents of linguistic imperialism. The neo-neo-colonial phase is characterized by the increased use of communication technologies, dissemination of centre languages in the periphery, and the promotion of cultural imperialism through language.

Linguistic imperialism, which is a primary component of cultural imperialism, permeates all the different types of imperialism through its form and content (Phillipson, 1992: 53). Form refers to language as a means of transmitting ideas, and the Centre's language, not the subjugated group's language, is used. Ansre (1979:12-13) defines linguistic imperialism as:

“The phenomenon in which the minds and lives of the speakers of a language are dominated by another language to the point where they believe that they can and should use only that foreign language when it comes to transactions dealing with the more advanced aspects of life such as education, philosophy, literature, governments, the administration of justice, etc... Linguistic imperialism has a subtle way of warping the minds, attitudes, and aspirations of even the most noble in a society, and of preventing him from appreciating and realizing the full potentialities of indigenous languages.”

“Linguicism” or “linguistic racism” is central to understanding English linguistic imperialism. According to Phillipson (1992:55), “linguicism refers exclusively to ideologies and structures where language is the means for effecting or maintaining an unequal allocation of power and resources.” Linguicism may be conscious or unconscious, overt or covert, abstract or concrete (Phillipson, 1992:55). English linguistic imperialism captures the way one language dominates others through unequal power and resource allocation.

2.5.1. Qualification Analysis

Brock-Utne (2006:24) states that a country's labour force is trained through the educational system to acquire three different types of skills, namely proficiency qualifications, adaptability qualifications, and creative qualifications.

Proficiency qualifications, which have to do with skills which are directly work-related, are divided into general proficiency qualifications and special proficiency qualifications. General proficiency qualifications lay the foundation for learning more advanced proficiency skills; for example, being able to read and make sense of what one has read prepares one for advanced text analysis of different genres. Special proficiency qualifications are skills which are specific to a vocation, e.g. welding. The special proficiency skills can also be learned on the job.

Adaptability qualifications have to do with desirable attitudes in the workplace and are divided into three sub-groups: active adaptability qualifications, which enable the learner to carry out his/her work with diligence and intensity; directly accepting adaptability qualifications, which enable one to carry out his/her duties willingly, obediently and with a sense of duty; and indirectly accepting qualifications, which prevent the worker from engaging in unprofitable activities such as strikes.

Creative qualifications are those that are a prerequisite for the development of productive forces, for example independence and openness, teamwork, a critical sense and creativity. Lesson transcripts were analysed using qualification analysis, social constructivism and the research questions.

2.5.2 Social Constructivism

Vygotsky's social constructivist approach to learning explains the link between culture (of which language is a part), learning and cognition. Vygotsky (1978:90) argues that it is through activity that individuals/learners come face-to-face with culture and that activities influence the way people think. Tasks or activities are socially and culturally designed, and learning is a mediated experience which comes about through the use of schema and scaffolding. "Scaffolding" refers to the kind and quality of cognitive or intellectual support which an adult or teacher provides for a child's learning (Mercer, 1991). The purpose of providing scaffolding is to improve learning because it leads to the appropriation of content, ideas and opinions. Mercer (1991:104) asserts that "appropriation", a concept that was introduced by Leontiev, Vygotsky's colleague, refers to the culturally-based quality of most learning. It conceptualizes initial learning as being culturally defined and brings to the fore the reciprocity of teaching and learning. It is not only learners who appropriate ideas; teachers themselves may need to appropriate ideas from learners (Mercer, 1991:105). Discourse strategies, such as paraphrasing and reconstructively recapping what has been done in class, improve learning.

Spradley and McCurdy (1975:5), maintain that "culture refers to ideas, knowledge that people use to interact with other people and to interpret experience, generate social behaviour and produce

artefacts.” Ngugi (1978:15) observes a symbiotic relationship between language and culture. He describes culture as being “almost indistinguishable from the language that makes possible its genesis, growth, banking, articulation and indeed its transmission from one generation to the next.”

A concept closely related to scaffolding is that of the zone of proximal development (ZPD). The ZPD represents the difference between what learners can do on their own (level of actual performance) and what they can do with assistance from other competent individuals, e.g. teachers and peers (level of potential development). Through scaffolding the teacher helps learners develop problem-solving skills, and this assistance in turn raises achievement levels. Mercer (1991:102) argues that the ZPD explains key features of learning and development, maintaining that giving assistance or instruction is a normal and important feature of learning, and that the limits of a person’s understanding or learning can be expanded by providing cognitive support.

A major criticism of Vygotsky’s activity-based theory is the hypothetical nature of his views and the fact that they were inconsistent with the demands of education in previous decades in Russia (Davydov: 1995). At the time that Vygotsky crafted his theory, education in Soviet Russia emphasized the collective in personal development to the exclusion of individuality. The individual could only be conceptualized in the context of the group. Davydov maintains that education in Russia was uniform and teachers served the state as bureaucrats by carrying out Communist Party dictates which excluded basic human, moral, aesthetic and religious values. Consequently, teaching methods were uniform and education did not contribute to the development of a free personality. Graduates from the education system could not use their own creativity to manage their personal lives.

The significance of Vygotsky’s theory for this research lies in the fact that it emphasizes an activity-centred approach and the centrality of language in education. The focus shifts from the teacher to the learner and the activity itself. Vygotsky’s theory suggests that for a learner to reach the ZPD he/she needs “psychological tools” such as language to interact with culture and learning. This means that the role of the school should be to affirm the cultural experiences of the learner and employ the languages that learners use in their social environment for teaching and learning. Culture and learning are dynamic and there is no one way to knowledge. To unleash learner

potential, promote creativity and greater comprehension and mastery of subject matter, teachers would have to provide what Krashen calls “comprehensible input” (Ellis, 1985: 262) in languages that learners understand.

Although Vygotsky has been criticized for emphasizing the collective in developing young minds, cooperative learning strategies, small group work, and whole class discussions have a place in the classroom as they complement teacher-centred methodologies. The advantages of learner-centred techniques are that they emphasize the importance of social interaction in learning, promote team work, and highlight the active role of the learner in constructing knowledge. The teacher relinquishes control in the teaching-learning situation and assumes a facilitative role.

3 Conclusion

The current study provides an opportunity for South African teachers to question their beliefs and assumptions about the role of language in education and to reflect on how their classroom language practices impact on teaching and learning in different contexts. Sutton and Levinson (2001:16) maintain that “studies on appropriation in general can be a lever against unexpected assumptions in policy formulation because they show how policy in practice differs from policy as conceived authoritatively.” The literature presented above provides an understanding of how MOI policies “impinge upon the daily lives of diverse people” (Sutton & Levinson, 2001:15), such as teachers who are expected to implement the MOI policies and the learners who are supposed to benefit from the exercise of policy-making.

In order to ensure change and counter the unintended effects of educational policies, it is imperative that policy development is informed by research, both to provide an understanding of the situation and to assist policy makers in identifying what their choices are (Reimers & McGinn, 1997:5). The gap between policy and practice can only be narrowed by engaging in research which takes into account the perspectives of role-players such as teachers.