

Due to the rapid development of science and technology, the proliferation of research activity and our continuously changing social, political, economic and cultural context constantly force us to evaluate and re-evaluate our knowledge and put our skills to the test. This volume offers insights into some of the new developments of theory and research in Cultural and Intercultural Studies that may equip students, teachers and researchers with up-to-date information regarding the state of the art of these fields of study. The fourteen contributions by different authors are organized into three main parts and address both the theoretical and the practical/pedagogical aspects of language learning, teaching and research. Part I focuses on the teaching of culture and intercultural communication and reveals important theoretical considerations and best practices. Part 2 of the volume presents the findings of empirical research on intercultural communication and the development of intercultural competence. The geographical orientations of the articles are also diverse. Although Part III is devoted to one area in particular, Australian Studies, the volume also contains papers relating to Hungary, Great Britain and New Zealand, as well as North and South America.

Even though the collection is predominantly theory- and research-oriented, the results of the investigations may offer useful information about the teaching, learning and researching of culture and intercultural competence for practicing teachers and students involved in university language programmes and teacher education. In these activities Dorottya Holló has played a unique role at the School of English and American Studies of Eötvös Loránd University, therefore this book is dedicated to her.

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Culture and intercultural communication

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Research and education

Edited by Krisztina Károly,  
Ildikó Lázár and Cecilia Gall



# CULTURE AND INTERCULTURAL COMMUNICATION

RESEARCH AND EDUCATION

*To Dorottya Holló*

# **CULTURE AND INTERCULTURAL COMMUNICATION**

## **RESEARCH AND EDUCATION**

EDITED BY

KRISZTINA KÁROLY, ILDIKÓ LÁZÁR and CECILIA GALL

SCHOOL OF ENGLISH AND AMERICAN STUDIES,  
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## FOREWORD

Our world is more and more connected and globalized, and we are constantly faced with local and global challenges. It is therefore an important task of university programmes to educate global citizens, with competences which enable them to deal with local, global and intercultural issues and which help them to engage in appropriate interactions with people from different cultures. In this endeavour English language programmes have an exceptional role since English undeniably functions as the *lingua franca* of global communication in all walks of life. Cultural and Intercultural Studies, which play an essential part in building up global competences, have gradually gained prominence and now occupy a significant position in foreign language programmes at many universities.

In this process Dorottya Holló has played a unique role at the School of English and American Studies of Eötvös Loránd University. She has devoted her working life to researching intercultural communication and the teaching of culture through language, to Australian Studies, and to working on curriculum design and research methodology, all of which allow a systematic exploration of these fields of inquiry. As a result of her research and teaching activities, these areas of study have found their way into all (BA, MA and PhD) levels of education at the university, and throughout her career she has helped students and colleagues to realize their potential. In 1991 she established the Australian Programme of the School of English and American Studies of Eötvös Loránd University and has been running the programme ever since; she also designs and coordinates the Cultural Studies lecture series of the Department of English Language Pedagogy of the same School. In order to express our gratitude to her, we dedicate this volume, a collection of papers written by her colleagues and students on Cultural Studies, Intercultural Communication and Australian Studies, to Dorottya Holló.

Due to the rapid development of science and technology, the proliferation of research activity and our continuously changing social, political, economic and cultural context constantly force us to evaluate and re-evaluate our knowledge and put our skills and competences to the test in the field of Cultural Studies and Intercultural Communication. This eminent need has brought this book to life. It offers insights into new developments of theory and research in the field, to equip our students, colleagues and fellow researchers with up-to-date information regarding the state of the art. Contributions in this volume are either theoretical or empirical in nature (Parts I and II) and address both the theoretical and the practical/pedagogical aspects of language learning, teaching and research. The geographical orientations of the articles are diverse: the volume contains papers relating to Hungary, Great Britain and New Zealand, as well as North and South America. However, Part III is focusing on one specific area in particular, Australian Studies, where most of Dorottya Holló's teaching, curriculum design and research activities have been conducted. However, the geographical orientations of the articles are also diverse, also contains papers relating to Hungary, Great Britain and New Zealand, as well as North and South America.

Part I focuses on the **teaching of culture and intercultural communication** and reveals important **theoretical considerations and best practices**. Magdolna Kimmel's study deals with the dilemmas around teaching culture in English as a Foreign Language classes in the age of global English. Péter Medgyes's paper reveals the role native and non-native teachers may play in developing language proficiency and intercultural competence. Francis J. Prescott delves into a very topical issue: Brexit. He discusses what the term actually means and how the topic can be exploited in

the foreign language classroom. The section closes with Erzsébet Barát's comparative analysis, a contribution to feminist research in Cultural Studies that contests the alleged incompatibility between entertainment and state politics, challenging the unproductive denunciation of the coupling of politics with popular culture.

The second part of the volume presents the findings of **empirical research on intercultural communication and the development of intercultural competence**. Ildikó Lázár addresses the potential of cooperative learning for intercultural competence development as viewed and practiced by in-service teachers surveyed in professional development workshops. Rita Divéki's pilot study deals with global, local and intercultural issues for global competence development in teacher training, as seen by university tutors in Hungary. Juliana Patricia Llanes Sanchez, Jennyfer Paola Camargo Cely and Aura María Estacio Barrios's work takes us as far as South America and explores resistant discourse-based pedagogies and their implications for South-American teachers' professional development. Ildikó Furka brings us back to the Hungarian context to offer a cultural value orientation analysis of a Hungarian educational institution. Amy Soto describes American and Hungarian perceptions of conversational style and the role of the listener in particular in English conversation.

As mentioned earlier, the third part of the book focuses on **Australian Studies, to explore its history in Hungary and to encourage us to engage in culture-oriented explorations**. Richard Nile's paper addresses the changes the new digital age brought to the development of Australian Studies over time and geographical distance. Cecilia Gall turns to the field of education and presents in detail the beginnings of Australian Studies in Hungary. Éva Forintos takes us to Australia and reveals the language and culture maintenance efforts of the Hungarian community in Australia. Staying in Australia, Vera Benczik's study examines the themes of otherness, fatherhood and survival in the 2017 Australian film *Cargo*. Peter Barrer turns our attention to Marmite (a dark, salty yeast-extract spread and noble by-product of beer brewing), contemplating important cultural connections between New Zealand and Australia.

Even though this collection is predominantly theory- and research-oriented, the results of the investigations may offer useful information about the teaching, learning and researching of culture and intercultural competence for practicing teachers and students involved in university language programmes and teacher education. We therefore hope that it will find its way into university courses too and motivate further research and best practices to help students and professionals cope with the local and global challenges of intercultural communication of our time.

As editors, we are grateful to all of those who have inspired and supported us in compiling this volume: our contributors, reviewers and students. We would especially like to thank Christopher Ryan for proofreading the papers for their use of English. Last but not least, we are indebted to Eötvös Loránd University, and within it the Faculty of Humanities for providing financial support for its publication.

*Krisztina Károly, Ildikó Lázár, Cecilia Gall*

## PART I

### THE TEACHING OF CULTURE AND INTERCULTURAL COMMUNICATION: THEORETICAL CONSIDERATIONS AND BEST PRACTICES



# CULTURE TEACHING IN THE AGE OF GLOBAL ENGLISH

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## **Abstract**

Since English is primarily used as a contact language today, allegedly far removed from its cultural roots, the role of teaching target language culture(s) is contested. This paper argues that there is an important role for teaching target language cultures in ELT classrooms. The 21<sup>st</sup> century and its challenges, however, call for a new approach: if culture is conceptualized as discourse, the aim of culture teaching should be to help students understand the struggle going on between conflicting discourses, different cultural representations of the world. This necessitates the nurturing of students' symbolic competence, which helps them to achieve an in-depth, nuanced and critical understanding of target language cultures and their own, both in their heterogeneity and historicity.

## **1 Introduction**

The late Edward Said was invited to visit a university in one of the Gulf states in the mid-80's and was then asked to evaluate their English programme and make recommendations for its improvement. He was disheartened to find that the curriculum was equally divided between linguistics (grammar and phonetic structure) and literary courses with a rigorously orthodox curriculum. Young Arabs dutifully read Milton, Shakespeare, Wordsworth, Austen and Dickens. Said notes they may as well have studied Sanskrit or medieval heraldry. On the positive side, he found that the English department attracted by far the largest number of students (Said, 1994, pp.368-369).

The reason why young Arabs flocked to the English department was that English emerged as the dominant means of international communication after World War 2. Its position as the global lingua franca was further strengthened after the disintegration of the Soviet Union and the Eastern Bloc. The English language is spoken by an estimated 1,120-1,880 billion people, of whom an estimated 320-380 million speak it as their native tongue (Crystal, 1997/2003, p.61). It is clear from these figures that more people speak English as their second language or as a foreign language than as their native tongue, and that the majority of interactions in English do not involve native speakers: English is primarily used as a contact language, a lingua franca.

This development results in a strong impetus towards instrumentalizing English language teaching. This seems to make sense: if English is thus removed from its native communities, what could be the point of teaching target language culture(s)? If teaching target language culture(s) still has a role, what exactly should it include? This is an important issue in public education, but can also be contested at college level. The curriculum described by Said as rigorously orthodox is the time-sanctioned

staple of English studies. Is it superfluous, or insufficient? Yet another question is what the curriculum of future English language teachers should comprise in terms of culture. They are going to get a diploma which says “teacher of English language and culture”, not “teacher of the English language and literature”. What is it they should be studying under the label ‘culture’?

This article sets out to seek answers to these questions. First, I am going to explore how the English language emerged as a global language and next, whether this may mean the de-culturation /instrumentalization of the English language or not. Then two definitions of culture will be discussed in an effort to establish the potential content of culture teaching. The third section will discuss current approaches to teaching culture in English Language Teaching (ELT). The last part of this paper will explore an example of teaching cultural content in a recently published coursebook. In my conclusion I will try to answer the questions I set out to explore.

## 2 Global English

What makes a language global, apart from the number of its speakers? “A language achieves a genuinely global status when it develops a special role that is recognized in every country [...] even though they may have few (or no) mother-tongue speakers” (Crystal, 1997/2003, pp.3-4). Crystal obviously thinks that English has reached global status, as it has been granted a special status in some 75 polities (p.60). Not everybody agrees with this claim, though. Mufwene (2010) points out that English has become a global language in several domains, but not in all, even in countries like Singapore or Scandinavian countries, where it has practically reached second language status. He also argues that English has emerged as the language of international communication in those – mostly metropolitan – areas of the world which serve as an interface between the nation states to which they belong and the wider world. He suggests that the more globalized the economy of a country is, the wider the spread of English there will be.

Mufwene’s description of how the world is getting more and more interconnected and interdependent, actually, may constitute a fairly nuanced and accurate picture of what is going on (c.f. the Economist, 2017, October 21st). However, it cannot be denied that the English language enjoys a special status in a number of key domains (trade, business, scholarship, the media, popular culture; for a full list see Crystal, 1997/2003) all over the world. Two research traditions emerged in Applied Linguistics (AL) in the wake of this development: World Englishes and English as lingua franca. The World Englishes (WE) tradition builds on Kachru’s (1985) ground-breaking work: he created a three-concentric-circle model to depict the spread of English globally. In his model, countries where English is spoken as the native language occupy the inner circle, countries where it was adopted as a second language, whether as an intra-national lingua franca and/or an official language, are located in the Outer Circle, and countries where English is taught as a foreign language constitute the Expanding circle. The main thrust of Kachru’s argument was that there is no longer only one English, the standard varieties spoken by the natives of the Inner-circle, but rather several. The Englishes spoken in the countries of the Outer Circle, India, Nigeria, Kenya, etc. – mostly in former colonies of Britain and now members of the Commonwealth – which are indigenized varieties of English, are just as worthy as the standards spoken in Inner circle countries. Kachru created his model in the 1980’s, in the wake of worldwide de-colonization. His effort led to the codification of the prestigious, indigenized varieties of the English language spoken by the elites in the countries of the Outer circle, while other, hybrid varieties, spoken in their lower class communities, were relegated to secondary status (Dewey & Leung, 2010, p.6).

After the fall of the Berlin Wall, Kachru's model was no longer seen as an adequate representation of the role of English in the world. "Dissatisfaction has grown with a model of English that remained tied to national identities" (Pennycook, 1994/2017, p.ix). As English emerged as the most frequently used contact language among people from different linguistic backgrounds in an increasing number of domains, a new research tradition was established to examine English as a *lingua franca* (ELF), or English as an International Language (EIL). The difference between the two terms is that EIL is regarded as English used for communication *across and within* Kachru's three circles, whereas ELF is English used to communicate among people from different first language backgrounds (Seidlhofer, 2005, p.339). In the beginning, the main aim of ELF research was to find the shared elements of ELF, with a view to exploring the pedagogical consequences of the fact that most people are more likely to use the language to communicate with other non-native speakers than with native speakers (Seidlhofer, 2003; Dewey & Leung, 2010). The logic behind this effort was that since native speakers are now a minority of English speakers, and since a language is defined by its speakers, proficient non-native speakers of English are better equipped to define the English language used for cross-cultural communication than proficient native speakers (Modiano, 1999, p.25). However, ELF communication has so far proven too elusive and transitory for codification. It will stay that way, some claim, because ELF is "not a thing in itself", it is only a hypostatized form of the language, which obscures the reality of Englishes of various kinds in contact (O'Regan, 2014, p.539).

If we compare the two paradigms, we find that the basic difference between them is that the WE paradigm concerns itself with the description of the Englishes spoken by distinct speech communities, while the ELF paradigm concerns itself with the use of the English language in "highly variable, dynamic, often temporary and unstable interactional settings, typically involving speakers from a range of linguacultural backgrounds" (Dewey Leung, 2010, p.9). As a result of this, some scholars of the World Englishes tradition claim that ELF is a mono-model, in which "intercultural communication and cultural identity are to be made necessary casualties" (Rudby & Saraceni, 2006, as cited in Jenkins, 2009, p.202).

It is not difficult to see that the WE scholars have a point here: what could be the use of preparing students for intercultural communication through culture teaching, especially target language culture teaching, if the almost exclusive point of English language learning is instrumental: effective communication in transitory, fluid environments? But, there is another issue to be considered: to paraphrase Canagarajah (1999/2000, p.178), can a language willy-nilly separate itself from history, ideology, and social institutions - from its native culture(s)? This is the issue I will now turn to.

### 3 The relationship between language and culture

Pennycook (1994/2017, pp.7-11) claims that the rapid spread and acceptance of English all over the world is widely regarded as natural, neutral and beneficial in mainstream AL discourse. Natural, as it seems to be bound up with the processes of globalization, which are regarded as inevitable and unstoppable. Beneficial, because international English is widely seen as a means and facilitator of peaceful international cooperation between equal partners. Neutral, since English is now seen as a language detached from its native cultural contexts, a merely functional means of communication. It is this last statement that is of special importance here: can a language be consigned to the role of a mere functional tool? Or, on a more general level: can a language be 'de-culturalized'?

A good many scholars argue that it cannot. Wierzbicka (1994) claims that each and every speech community has a system of cultural rules or scripts which

define what can be said and how: sociopragmatic rules. She also argues that in every speech community there are culturally charged concepts, entangled in different associative webs, networks of meaning, which make translation and mutual understanding difficult: for instance, the Russian concept of 'dusa' (soul) is one such concept. To translate it into English by merely providing the dictionary term 'soul' is deeply misleading. The true meaning of the term, the *symbolic* meaning it carries for native speakers of the Russian language, is lost in translation (Goddard & Wierzbicka, 1995, pp.47-48). Bennett (1997) offers a list of examples arranged under categories, including semantics, socio-pragmatics and grammatical structure, to show how language affects the way its speakers perceive and consequently interpret the world. McKay (2004, pp.5-9) lists three categories in which language and culture are bound together: semantics, pragmatics, and rhetoric. Clyne & Sharafian (2008, p.28.11) add one more element to the above list: "Language is also used to express cultural conceptualisations, such as cultural schema, that have developed among the members of a speech community across time and space." The concept of cultural schema clearly refers to something more than sociopragmatic norms or semantics: it refers to a certain "world view", or "cosmivision". Fantini (1997, p.12) asserts the same.

Risager (2005, p.189) says there are two diagonally opposite opinions on the connection between language and culture. Those working in anthropological linguistics, translation studies and intercultural communication argue that language and culture are inseparable. Those who study English as an international language claim the two are separable. She herself asserts that language in a generic sense is not separable from culture, and finds the generic sense in the psychological/cognitive and the social spheres, i.e., semantics and pragmatics. "Human culture always includes language and human language cannot be thought without culture. Linguistic practice is always embedded in, and is in interaction with, some cultural, meaningful context" (Risager, 2005, p.190). She suggests the term "languaculture" to denote language in the generic sense, based on the suggestion of the American anthropological linguist, Agar, who (1994) used the concept of "languaculture" to express the inseparability of language and culture in terms of semantics and pragmatics. Risager (2005, p.190) uses the notion of "languaculture" to theorize how language and culture can be inseparable in one sense, the generic sense, but separable in the other, differential sense. In the differential sense, some aspects of culture, like musical traditions, fashion, architectural styles, food, norms, values, symbols, ideas and ideologies can be separated from language. Basically she claims that cultural products, among which she includes values, norms, ideas, etc., can be separated from language.

The argumentation, as we can see from the above examples, runs along the lines that a language and the culture it is rooted in are intertwined and inseparable in a good number of ways: semantics, pragmatics, rhetoric, even world-views. It is easy to accept this claim in the case of a native speaker community. If we consider the case of an indigenized variety of English, e.g. Indian English from this point of view, we will see that the language has been adopted to the local needs and local culture: this means that indigenized varieties of English are detached from their Inner-Circle, native roots, but, at the same time, they have become bound up with the local cultures they are now part of. Language and culture are again intertwined: the language became disconnected from one culture and reconnected with another culture. Consequently, the struggle for the legitimacy of these varieties meant, at the same time, a struggle for the equal status of the cultures they have become bound up with. Indian English or Nigerian English are now part and parcel of their native cultures, as well as a symbol of their identity. But whose culture is ELF or EIL intertwined with?

Jenkins (2009, p.202) claims that ELF speakers actually have a chance to validate their cultural identity through the use of ELF, by appropriating English and establishing their own varieties, like Japanese English, or Hungarian English for that matter. But,

then again, English is not culture-free, but is infused with the culture of the respective communities of its speakers, Japanese, or Hungarian. That is, Jenkins does not expect ELF to be culture-free: she expects it to get bound up with the native cultures of the speakers. Is this possible? According to Risager (2005) a learner of any foreign language will start using the new language according to the rules/norms of the languaculture of his/her first language. "Personal connotations to words and phrases will be transferred, and a kind of language mixture will result, where the foreign language is supplied with languacultural matter from another language" (Risager, 2005, p.192). Although she argues the learner will sooner or later supersede this level, he/she will never end up as an insider in the native languaculture. What Jenkins (2009) is arguing for is the emancipation of these varieties as legitimate varieties of English, not as 'interlanguages, imperfect Englishes of the learner, just like Outer Circle Englishes have been legitimized.

Therefore, one response to the above question, namely whose culture English is bound up with in English as a Foreign Language (EFL) contexts, is that it will get bound up with the native culture of the learners. But there is another response to this question. To get to this response, let us see, first of all, what kind of English is taught in EFL contexts. (In English as a Second Language (ESL) classrooms, where the aim is to integrate the learners into the community of native speakers this is a non-issue.) Dewey and Leung (2010, p.11) quote Howatt (2004), who established that textbook English is "the standard English used by educated people in all English-speaking countries". Although Dewey and Leung (*ibid.*) problematize the notion of 'standard', the fact of the matter is that textbook English is basically standard, usually British English, at least in our context. As Kramsch & Zhu (2016, p.40) say: "for example, when Hungary's national school system hires British-trained or native English teachers, and uses British textbooks to teach English in Hungarian public schools, is British English being taught as a foreign language to Hungary, or as an international second language or lingua franca?" We may safely say that this is the situation in a good many other EFL contexts, not just in Hungary: one of the standard varieties is taught, in some contexts British, in others American.

The second issue is what cultural content is included and thus taught in those coursebooks that are used to teach standard British or American English to learners who may, however, mostly use the language in ELF contexts. As early as 2002, Gray noted how English Language Teaching (ELT) coursebooks marketed internationally had been slowly de-territorialized, i.e. had shifted from a native speaker locality - like Britain - to international settings where English is used as a lingua franca between speakers of English from diverse backgrounds (Gray, 2002, p.157). One may claim that this happened as a reflection of the lingua franca role of English in the world, which was further strengthened after the disintegration of the Soviet bloc. The content in such materials reflects a global culture: it features global citizens, the beneficiaries of globalization, who enjoy the diversity and hybridity of 'the new age' and are no longer tied to the nation states they come from. Their lifestyle is that of the successful, affluent middle class citizen-consumer, which is presented as the global norm. This lifestyle is characterized by success, by self-agency, by not being dragged down by life's challenges and difficulties, by having enough expandable financial as well as cultural capital to enjoy the finer aspects of life (Block, 2010, p.296). As Phillipson (1992/2000, pp.280-283) noted, this is the functional argument to promote English as an international language, namely, to draw people's attention to what English does, what it can give access to. The lifestyle gives something the learners can aspire towards through mastering English: membership in a cosmopolitan, consumerist global citizenry, whose archetype is the affluent middle class of Western societies, which is pre-eminently influenced by Anglo culture(s), the US being the only super-power in the world. The language taught is standard British or American, the culture taught is a pre-eminently Western, essentially Anglo culture, packaged as "global culture".

This suggests that culture is taught in the language classroom even when one is inclined to believe that it is not. Canagarajah (1999/2000, pp.9-14) convincingly shows how even the most innocuous content, a day in the life of a person, can emanate first language (L1) cultural values. This is what Kramsch and Zhu (2016, p.40) refer to when they describe English as the language of aspiration towards “a multinational culture of modernity, progress and prosperity. This is the language of the ‘American Dream’, Hollywood, and pop culture that is promoted by the multinational U.S. and U.K. textbook industry, e.g. ESL taught to immigrants in the U.S. and the U.K., or in secondary schools in Hungary, Iraq and the Ukraine.”

The important question to be considered at this point is how a language becomes an international language of aspiration. It does not happen because of its specific linguistic features, even though this argument was promoted back in the 19th century, when languages of colonial powers, primarily French and English, were competing for global lingua franca status. It happens because of its speakers’ economic, technological and cultural power (Crystal, 1997/2003, p.7; Phillipson, 1992/2000, pp.52-53; Mufwene, 2010, p.81). As Rudby (2015) says:

There is no such thing as a neutral playing field where all languages enjoy equal status. Power is real. This is particularly true of English and the power it wields today, derived from its link with British colonialism and imperialism, and strengthened more recently by its close interlocking with the corporatization of the world as embodied by the processes of globalization. The latter encompasses also English’s dramatic monopolization of education, technology, culture, mass media, consumer values and lifestyles in many parts of the contemporary world. (p.42)

By declaring English to have been removed from its native communities, to have transformed into a value-free, culture-free lingua franca, the fact that its status is actually derived from the power of Inner Circle countries is obscured, thus creating a false consciousness for learners (O’Regan, 2014, pp.539-540).

Based on the above, it seems English has not been ‘de-culturalized’. Depending on its varieties, it may be bound up with one of its native culture(s), or with the culture of societies where it is spoken as a second language. In EFL contexts, like ours, the standard varieties are taught: this is the ever elusive goal towards which learners aspire. This standard variety of English is taught through a cultural content which depicts, mostly, the idealized life-style of a multinational affluent middle class, whose nationalities can be deduced from their names, but otherwise their essentially cosmopolitan culture emanates Anglo values and norms of behaviour. Therefore, one may describe the ‘protagonists’ of these books as multinational, but not as multicultural. The culture in the books is presented as universal, but it is not. It is a Western, primarily Anglo culture. Thus teaching about target language culture(s), or rather about a false and distorted representation of target language culture(s) is happening, although in a covert fashion, which creates a kind of ‘false consciousness’ in learners. I argue that it would be justified to make students aware of the culture-bound nature of these values and norms of behaviour. Firstly, these values are far from being universal: a good many cultures, no less worthy than target language culture(s), feature a different set of values, for example, a collectivist mindset. Individualism has a special, central role in the currently dominant target language culture, in the US. Furthermore, once Anglo values are proposed as universal, learners may be under the impression that these values and norms are the only valid, universally accepted ones, so if their culture is different, it is necessarily a second-rate, inferior one, from which they should distance themselves. Canagarajah (1999/2000, pp.22-23) and McKay (2002, p.95) describe examples of this happening in English classrooms. Last but not least, I also argue

that it could be of some use to present the target language cultures as complex, multicultural, heterogeneous societies, where groups with conflicting values, interests and lifestyles have to live together, and manage to live together, instead of promoting the image of an idealized middle class cosmopolitan consumerist citizenry. I believe that the reality of target language cultures could teach learners many useful lessons.

Since English does not seem to have been de-culturized at all, let us explore what cultural content should be taught. To clarify this, we need a definition of culture.

#### 4 The concept of culture

Culture is a notoriously elusive concept, as all authors will readily accept. Meadows (2016, p.163) claims that the concept of culture in ELT, or more generally in foreign language pedagogy, has undergone a certain evolution: it has become more and more complex, as in every decade scholars added new and new layers to its definition. It is, therefore, perhaps best to limit our discussion to two conceptualizations which may be of some use when discussing the evolution of the content of culture teaching in ELT. The first definition differentiates between “Big C” culture and “small c” culture:

[c]ulture in the broad sense has two major components. One is anthropological or sociological culture: the attitudes, customs, and daily activities of a people, their ways of thinking, their values, their frames of reference. Since language is a direct manifestation of this phase of culture, a society cannot be fully understood or appreciated without a knowledge of its language. The other component of culture is the history of civilization. Traditionally representing the ‘culture’ element in foreign language teaching, it includes geography, history and the achievements in the sciences and the arts. This second component forms the framework of the first: it represents the heritage of a people and as such must be appreciated by the students who wish to understand the new target culture. (Valette, 1986, p.179)

The above definition of culture is comprehensive enough to provide the framework for a thorough analysis of a group’s culture, primarily for the analysis of a national culture. However, in the understanding of the concept of culture there has been an important shift from a concept of culture as products and behaviours to a concept of culture as meaning making. It started with the rise of semiotics, through the ground-breaking work of Saussure. According to semiotics, language can be regarded as a system of signs used as a means of communication. A ‘sign’ in and of itself is just a thing, it has no meaning. It only becomes a sign – a symbol of something – and acquires meaning when a human community agrees to attach a certain meaning to it (Szönyi, 2014, p.74).

It is through language – and other systems of symbols – that we attach meaning to signs and create a representation of our world, which is, in effect, ‘our culture’. Therefore, meanings can only be truly understood in the context of the culture they were produced in. Furthermore, no culture is static: each evolves over time, each has historicity. Thus to make sense of a representation, one has to place it in the specific historical period it was produced in. “Meanings are produced within history and culture. They can never be finally fixed but are always subject to change, both from one cultural context into another and from one period into another” (Hall, 1997, p.32). The meanings we attach to things – i.e. our culture – change through changes that take place in our communities’ discourse and discursive practices. A discourse is more than a stretch of writing or speech, as it is usually defined in linguistics. Discourse in this sense is the language a community uses in a certain period of time to talk about a topic, and also a set of rules and conventions which regulate how a topic can be talked about in a community. This latter is called “discursive practice” (Hall, 1997, pp.44–45).

It follows from the above that successful communication through the use of a system of signs – like a language – necessitates the presence of an interpretive community, which agrees on the meanings attached to the signs. The next question, then, should be how an interpretive community is formed. The starting point to understand this may be Clifford Geertz's (1973, quoted in Szőnyi, 2014, p.74) definition: "Culture is the ensemble of stories we tell ourselves about ourselves". Szőnyi (2014) explains this definition as follows:

the phrase "stories" refers to textuality, but also to the fact that these stories are made up, are constructed. It means that culture is to some extent fictitious. The phrase, "about ourselves" indicates self-reflexivity and self-representation; "telling [to] ourselves" suggests that there is a community, which circulates the stories for the purpose of identity-formation and identity consolidation. With the help of these stories we recognize ourselves as individuals, at the same time members of a community. The recognition happens as a result of an interpretive act, the community possessing the stories is thus ... becoming an interpretive community. (p.74)

What kind of communities can serve as interpretive communities? A nation is an example of such a community (Anderson, 2006, p.6). Can there be several different ensembles of stories of a nation? Certainly. The North and the South have been telling themselves different stories about the American Civil War. Certainly the stories that African-Americans are telling themselves about the Civil War are different from the stories of whites from the North and the South as well. Interpretive communities may also be based on class, ethnicity, sexual orientation, political views etc. within a country, but also on a global scale, trans-nationally. The different discourses of different interpretive communities are constantly vying for recognition and/or for dominance within the mainstream discourse of countries, as well as on the global stage.

In this section two definitions or conceptualizations of culture have been discussed. Culture can be understood as the 'Big C', i.e., institutional/achievement culture and 'small c', i.e., behaviour culture of a group. It can also be understood as the cultural representation – meaning – of the world created by a group through language, through discourse. This is constantly changing and evolving through the inner struggle going on within the group, and due to external influences as well. Discourses are not bound to a group, like a nation, they may supersede cultural boundaries; for instance, the discourse of the Enlightenment or Protestantism. Let us see now how these conceptualizations of culture appear in the teaching of culture in foreign language classrooms.

## **5 Two current approaches to culture teaching in ELT**

Several authors have provided an overview of how culture teaching has featured within foreign language teaching (Lo Bianco, Liddicoat, & Crozet, 1999; Risager, 2012; Kramsch, 2013; Meadows, 2016). Kramsch (2013) and Risager (2012) both argue that there are two basic approaches to culture teaching today: modernist and postmodernist, which coexist.

Kramsch (2013, pp.64-69) distinguishes two major paradigms within the modernist approach: the humanistic tradition focusing primarily on the literature and the arts of the target language group, i.e., elements of "Big C" culture. With the advent of the communicative approach in the early 1980's, the focus of culture teaching shifted to "small c" cultural elements, teaching about the patterns of everyday life in the target language communities. This turn, however, often led to essentializing

cultures, to teaching stereotypes, ignoring the heterogeneity and historicity of target language cultures. She assigns both teaching “Big C culture” and “small c culture” to the modernist paradigm by virtue of the fact that both are grounded in the notion of the “one nation”, “one culture”, “one standard language” tradition.

Kramsch (2013, p.70) also assigns to this category the currently dominant Intercultural Speaker model of culture teaching, which was proposed by Byram in 1997, based on the fact that it still focuses on comparing L1 and L2 cultures. Since this is the dominant model of culture teaching in foreign language pedagogy, it is necessary to examine it in detail. Developing learners’ Intercultural Communicative Competence (ICC) is the centrepiece of this model. ICC includes two major areas: communicative competence, comprising linguistic, sociolinguistic and discourse competence and cultural competence, comprising knowledge, skills, attitudes and critical cultural awareness. An Intercultural Speaker is able to occupy “a third place” (Kramsch, 1993, pp.233-259), a vantage point from which he/she is capable of reflecting on his/her own culture and the target culture alike, and to understand culture as difference (McKay, 2002, pp.82-83).

To develop learners’ Intercultural Competence, Byram (1997) clearly argues for a comparative approach, for comparing L1 and L2 cultures. This is clear from his description of the knowledge component of “Intercultural Communicative Competence” (Byram, 1997, pp.58-61). He says that such comparisons serve as *models/examples* of how cultures work and *how cultures* can be explored (emphases added). The knowledge and skills acquired in the process can be used later for similar cultural explorations, or in inter-national communicative situations for which the learners were not directly prepared (Byram, 1997, p.20). However, he stresses that it is important not to simply raise students’ awareness of the differences between their home culture and the target culture, but also to make sure that they develop an awareness of their own culture’s peculiarities, of how it looks relative to the other culture, from another perspective. In Byram’s model, the intercultural speaker’s critical cultural awareness, i.e., their ability to critically appreciate their own and others’ culture without bias takes central place. Focusing only on the differences may result in a reinforced ethnocentric world-view, he claims. In contrast, if someone manages to change perspectives and see the complexity of a foreign culture from the inside, and his/her own culture from the outside, changing perspectives may be easier next time, when engaging in communication with non-native speakers from diverse cultural backgrounds. He also emphasizes the importance of presenting the complexity of the target culture as well as its dynamics, its evolution over time. In short, the teaching of inner circle cultures in this conceptualization does not serve to perpetuate their primacy, but rather as an experiment on the learners’ behalf to change perspectives, which is a precondition for cultural appreciation and learning (1997, pp.19-20).

Even though the Intercultural Speaker model is still the most widely accepted model today, Meadows (2016) observed that a new trend has been evolving within it: while reviewing the culture teaching related professional literature up to 2015, he noted that there has been in the 21<sup>st</sup> century a gradual shift away from culture-specific cultural knowledge towards culture-general cultural knowledge.

One might imagine a painting hanging on a museum wall. The oil painting inside of the frame can be seen as the teachable content in a culture-specific orientation. Take away the painting and only the frame is left. That frame becomes the content for culture teaching under the culture-general orientation. (Meadows, 2016, p.156)

The transition towards a focus on culture-general knowledge means that the comparison of L1 and L2 cultures is no longer seen as relevant. ICC is to be developed by critical self-reflection, which will prepare the learners for unpredictable cultural

settings. However, it is difficult to see what the learners will reflect on: their own interpretive frame? But their interpretive frame is culturally determined and can only be explored and reflected upon when compared to another person's interpretive frame, also determined by his/her culture. Removing Inner Circle cultures from the frame, and replacing them with other cultures, does not seem to be unproblematic, either. Discussing cultural content from a third (not L1 or L2) culture may be difficult for teachers of English. McKay (2002, 2004) discusses this matter in some detail. She says the disadvantage can be that the third culture content may be alien to both learners and the teacher, and the latter may be unable to find additional information about it. The learners may thus find the content puzzling, uninteresting, even demotivating. The advantage can be that learners may meet examples of successful intercultural communication through the use of English (McKay, 2002, pp.92-93, 2004, pp.12-13). While her argument for third culture teaching is certainly valid, I argue that even if teachers find additional information on the third culture, their understanding of the information may be limited, or, what is even worse, superficial, stereotypical or even distorted. Using universal criteria for cultural analysis – like Hofstede's (Hofstede, & Minkov, 2005) cultural dimensions – may result in essentializing cultures. Also, the concept of cultural dimensions can be best grasped through specific examples. It is only after learners have gained a thorough understanding of cultural dimensions through specific examples that we can hope that they can use them successfully as an interpretive framework, and even then they must be used with caution. Therefore, one is tempted to say that it is through the in-depth analysis of specific cultures that someone can best learn how to explore and empathize with other cultures. In the absence of specific cultural content, what is left is 'attitude formation', the importance of which should not be underestimated. However, it is questionable to what extent general goodwill, tolerance, curiosity and flexibility will prove sufficient when someone faces deeply rooted value differences, conflicting interests, or hostility. One may also wonder whether respect, tolerance, or, for that matter, human rights carry the same meaning in all cultures.

Now, turning back to the perceived change of focus in the Intercultural Speaker model, the question arises: What may have motivated this change? Probably the vast changes that Kramersch describes as follows:

in our days of exacerbated migrations, global mobility, and global modes of communication, culture ... has become something that *individuals* carry about in their heads when they leave home, migrate to another country, settle down in a third and they raise their children who will spend much of their days online and on the internet. The national culture that is generally associated with a national language is being problematized by the increasingly diverse populations of post-industrial societies. (Kramersch, 2018, p.18)

It may be useful to keep in mind, though, that this is how the world looks from a certain subject position in the world. As Mufwene (2010) points out, globalization has impacted upon different areas of the globe to a different extent.

Still, the change of focus in the Intercultural Speaker model may have happened due to these changes. To meet the challenge posed by the 21<sup>st</sup> century, Kramersch (2013) promotes a new, postmodern or late modern view of culture, which focuses on culture as discourse, which she defines as "something that offers various ways of meaning-making through various symbolic systems" (p.356). Discourses are not necessarily limited to a national culture, so focusing on them may be a more adequate response to the challenge of a rapidly globalizing world than the "empty frame". As Risager (2012, p.193) asserts, the concept of languaculture is bound to a specific language and culture, but discourse is not: discourses transcend the boundaries of languacultures.

For example, the discourse of Christianity is not bound to any specific language, though some languages may be better positioned to verbalize it, she says.

Kramersch (2013) argues that the late-modern approach “manages not to lose the historicity of local national speech communities while attending to the subjectivity of speakers and writers who participate in multiple global communities” (p.70). Two words stand out here: subjectivity and historicity. Culture is regarded as subjective, something individuals carry in their heads, not geographically bounded to nation states. Subjectivity means that each and every person enjoys access to a unique motley of cultures – of which national culture is only one – and he/she is free “to gain a voice,” to establish an identity, by negotiating a space through the available discourses. Subjectivity “provides subjects with the possibility of forming new identities and gaining a critical consciousness by resisting dominant discourses” (Canagarajah, 1999/2000, p.31). I argue that one cannot negotiate a position, gain recognition and carve out an identity for oneself through any discourse without having a thorough knowledge and critical understanding of the competing and contested discourses of the world, many of which, the dominant ones, clearly emanate from English-Speaking – Inner Circle – cultures.

The other new word is historicity. Why does Kramersch insist on not losing the historicity of local speech communities if she asserts, as we have seen above, that national cultures are being eroded as a result of global migration and emerging hybrid societies? Her definition of culture can answer that question: “Cultures are *portable schemas* of interpretation of actions and events that people have acquired through primary socialization and which change as people migrate or enter into contact with people who have been socialized differently” (emphasis added) (Kramersch, 2018, p.20).

Though people in the 21<sup>st</sup> century tend to migrate globally and live in hybrid communities, the culture(s) they were enculturated into still define their “portable schemas”. Thus understanding the historicity of other cultures – nations, ethnic groups, genders, classes, religions – and thus the historical experiences of the Other – is of key importance from the point of view of effective cross-cultural communication. As Kramersch (2006) puts it when arguing that mere communicative competence is insufficient for successful cross-cultural communication:

the exacerbation of global social and economic inequalities and of ethnic identity issues, as well as the rise in importance of religion and ideology around the world have created *historical and cultural gaps* that a communicative approach to teaching cannot bridge in itself. In order to understand others, *we have to understand what they remember from the past, what they imagine and project onto the future and how they position themselves in the present. And we have to understand the same things of ourselves.* (emphases added) (pp.250-251)

Instead of “the empty frame” which the Intercultural Speaker model according to Meadows (2016, p.156) proposes in response to the challenges of the 21<sup>st</sup> century, Kramersch (2006) promotes focusing on discourses and as an aim she sets the development of the symbolic competence (SC) of learners. Later, in an annotated bibliography on SC, this 2006 article of hers is referred to as “A first attempt to define SC as the ability to manipulate symbolic systems, to interpret signs and their multiple relations to other signs, to use semiotic practices to make and convey meaning, *and to position oneself to one’s benefit in the symbolic power game.* SC is nourished by a literary imagination.” (Emphasis added) (Kramersch & Whiteside, 2015a, p.3) However, if we carefully read through this annotated bibliography, we will see that the concept of symbolic competence has been interpreted, critiqued and elaborated on by various scholars in numerous ways; that is, it has proven to be a rather elusive concept.

Symbolic competence is perhaps best grasped through reference to two slides from a presentation by Kramersch & Whiteside (2015b). On the first slide we see a number of people happily communicating with each other, while one person is standing apart, excluded and unable to get involved. The question she poses on the next slide is whether the excluded person lacks one or several components of communicative competence or intercultural competence, or lacks 'symbolic competence', which is defined as the ability to play the power game, having institutional legitimacy, and having the power to reframe the context. The point is that it is his inability to position himself to his advantage in the symbolic power game – i.e., his lack of symbolic competence – that makes it impossible for him to make his voice heard.

How does symbolic competence work? Symbolic competence is exercised through *symbolic representation*: by classifying and categorizing the world, e.g., categorizing social actors as freedom fighters or terrorists. Those who have the power to categorize and classify the world have the power to make others live in the social world as defined by them (Kramersch & Whiteside, 2015b, Bourdieu, 1991, pp.105-106). Symbolic competence is exercised through *symbolic action*, by performing speech acts. This is again a power game, since only those who are invested with symbolic power through the institutions of society are recognized as legitimate speakers. For example, an order issued by a private to an officer will not be obeyed, since a private lacks 'symbolic power', i.e. institutional legitimacy (Bourdieu, 1991, pp.74-75). Last but not least, symbolic competence is exercised through *symbolic power*, which is "the power to construct social reality," through which we construe our cultures and identities, as well as produce, reproduce or subvert dominant discourses. (Kramersch & Whiteside, 2015b) These are essentially the three facets of discourse as a symbolic system: symbolic representation, symbolic action and symbolic power.

The most important element in Kramersch's conceptualization of discourse as a symbolic system is "symbolic power". Symbolic power is "What creates the power of words and slogans, a power capable of maintaining or subverting the social order, is the belief in the legitimacy of words and of those who utter them. And words alone cannot create this belief" (Bourdieu, 1991, p.170). Discourse as symbolic power can be understood as having the power, the economic and the social capital to define what topics can be talked about and how within specific cultures, some of which, however, in our globalized world, do transcend the boundaries of their nation states. 'To gain a voice' is to recognize discourses as being tied to symbolic power, and to be able to make an informed and conscious decision to espouse them or subvert them.

What Kramersch (2013) proposes as a post-modern approach to the study of culture is based on a concept of culture as discourse, as meaning-making, culture as representations created through discursive practices. Teaching culture in this fashion, however, is a highly complex task, and points towards an interdisciplinary field of study, Cultural Studies. Furthermore, not only does teaching culture as cultural representations call for an interdisciplinary approach, but "It is also important to emphasize that since cultural representations are tied to specific periods from the past to the present, one of the most important aspects of their study is the historical approach and contextualization" (Szönyi, 2014, p.75).

It is difficult to see how such a complex way of approaching culture may play out in the context of EFL or ESL classrooms, even though Kramersch (2011, pp.362-364), Byram and Kramersch (2008), Kearney (2012) and Vinall (2016) present examples, though mostly for college level foreign language classes. Kramersch proposed the idea of symbolic competence first in 2006, and in her article she argues for developing learners' symbolic competence through teaching target language literature. However, she thinks the orthodox approach exemplified in the extract from Said (1994) in the Introduction of this paper certainly will not do. As she puts it: "we certainly do not need a return to textual exegesis or to the study of author, period and style of first year

German" (2006, p.251). One is tempted to believe that this kind of approach to culture teaching at college level calls for an integration between the traditional studies of language, studies of literature and studies of history and society, which Risager (2012, p.195) so convincingly argues for. She thinks an interdisciplinary approach to foreign and second language studies is needed, in which complex problems are interpreted and analysed with various means from various viewpoints. For a potential example of how this may be done I am turning now to a mainstream coursebook: *Solutions Advanced Third Edition* (Falla & Davies, 2017) which, in my view, attempts to develop learners' symbolic competence.

## 6 Teaching culture as discourse in its historicity and contextuality

*Solutions Advanced Third Edition* was published in 2017. The series is fairly popular in Hungary, though only a minority of students reach an advanced level and thus use this volume. The book consists of nine units, and there are nine culture-focussed supplements carefully linked to each unit but added as a kind of extra at the end of the book. Each supplement comprises a history (context) and a literature page. All Culture Supplements focus on Inner-Circle cultures, the UK and the US in roughly equal proportion.

The topics touched upon in the nine units neatly fit into the categories that Block (2010, pp.296-299) identified as featuring in most ELT materials intended for global consumption:

- success – people, dead or alive, celebrities or ordinary people who have achieved success or are on their way to achieve success;
- emotional life – a lot of units deal with psychological topics, either general topics rooted in psychological research, or more self-revelatory ones, on friends, family, siblings, childhood memories, finding a partner or topics like sleeping habits or the influence of language on one's way of thinking;
- lifestyle related topics; hobbies, travel, popular culture, films and novels, literature.

It must be noted that apart from global issues, e.g. environmental issues, the units themselves include political, historical and cultural topics, like nuclear power, the Iraq war, WikiLeaks, migration, the Vietnam war, Watergate, and the Civil Rights movement. It can be seen from this list that the book is heavily infused with L1 culture-related content, but its willingness to address delicate issues provides a more realistic picture of L1 cultures as well as of the world.

Out of the nine Cultural Supplements – due to space constraints – I am going to comment on one with an American cultural focus. This, in my view, lends itself to developing symbolic competence by helping learners to grasp the sense of culture as an arena of competing discourses at a point of time in history. The supplement is about the Civil War, and it may be used to invite learners to examine it from three perspectives: that of the slave owners, the abolitionists (John Brown) and the slaves. The three perspectives are complemented by a fourth, provided by the embedded literary work, Louisa May Alcott's 'Little Women', which is set in the same historical era. By involving the figure of John Brown yet another issue can be brought to the spotlight: using violence to achieve an aim. By working through the supplement the learners can "demonstrate critical literacy, i.e., meaning-making and perspective-taking practices in the analysis of cultural and historical narratives," which is a way of nurturing symbolic competence (Heidenfeldt & Vinall, 2017, p.7).

In Unit 6, to which this supplement is connected, Martin Luther King's "I have a dream" speech is discussed. Four historians' shed light on the contemporary reception of the speech, thus helping us put the text into historical context. This truly symbolic

speech could be usefully analysed with the help of the questions Kramersch compiled to support teachers and learners to place any piece of text in a wider discourse, in a historical context, as well as to explore its intertextuality:

- Not which words, but whose words are those? Whose discourse? Whose interests are being served by this text?
- What made these words possible and others impossible?
- How does the speaker position himself/herself?
- How does he frame the events she is talking about?
- What prior discourses does he/she draw on? (Kramersch, 2011, p.360)

Working through the text, it is not only the Civil Rights movement that can be discussed, but the cultural revolution of the 1960's, as well as the concept of the 'American Dream'. Each of these can be regarded as cultural representations, transcending national boundaries. The cultural revolution of the 60's swept through the whole world; it was not limited to one country. The American Dream has its intellectual roots in ancient Greece, Protestantism and the ideas of the Enlightenment (Freese, 1987). It impacted, however, not only on Europeans. (See Takaki (1989/1998) on how the idea of the American Dream impacted on Asians and fuelled immigration.) Furthermore, teaching this unit and supplement may also help or even force students to confront their own culture's discourses on race.

One may ask, though: how does this all help intercultural communication between a Hungarian and a Czech who use English as a lingua franca? When two interlocutors are engaged in instrumental/functional communication, like a business transaction, where it is in both parties' interest to successfully conclude the transaction, this may not help, though the ability to see a situation from different perspectives should be useful. However, intercultural communication is not limited to business transactions or other, by and large functional, interactions. It also includes communication regarding other, historical, ideological, cultural, social etc. issues, conflicts and differences between people with different 'cosmovisions' (Fantini, 1997, p.12). Covering this supplement and Martin Luther King's speech can also lead to a discussion of how the cultural revolution of the 60's played out in the 'Eastern Bloc', the Prague Spring and Hungary's dismal role in crushing it.

How could this knowledge promote better understanding between Czechs and Hungarians? It is bound to result in just the opposite, one might claim. This may be true. But I argue that this is only true if the Czechs and Hungarians lack the symbolic competence to re-frame their post-1945 history. They were both represented in mainstream discourses as 'Eastern Bloc' countries till the change of the regimes, and even today are often referred to as Eastern Europeans. The fact that they have always classified themselves as Central Europeans – and for very good reasons – and neither nation chose to belong to the 'Eastern Bloc' in the first place, seems to have been comfortably forgotten. Thus the symbolic power to re-frame reality – a component of symbolic competence – may help better communication between Czechs and Hungarians when they are using English as a lingua franca.

Seeing oneself through the eyes of the Other can be an edifying experience for all concerned, though it is hardly an easy task. However, only through seeing oneself through a different mirror can the individual's 'symbolic competence' develop, and reach a point when one is prepared to get engaged in the 'power game of discourses', when one is prepared 'to gain a voice'.

However, it must be admitted that it would be difficult to adopt such an approach to target language culture teaching in secondary, let alone primary English classrooms. It may be feasible to a certain extent if the school implements a curriculum based on the interconnectedness of subjects. Furthermore, the education of future English language teachers must also be adapted if such an approach is to

be followed. How the symbolic competence of English language teachers could be nurtured is an unexplored area, since literature on developing symbolic competence mostly focuses on activities for college majors (Back, 2016, p.20). I argue that nurturing the SC of future teachers of English should be attempted in university level teacher education even if the approach is unlikely to take root in public education, since we need teachers who have an understanding of the post-modern world, which is growing into a clamouring motley of discourses vying for dominance. Symbolic competence is of special importance in the case of Anglo cultures, since their impact has been the most wide-ranging and profound in the world.

## 7 Conclusions

In this paper I set out to examine whether English can be taught and learnt deprived of cultural content. My conclusion was that a language, even when it is used as a means of international communication, carries a culture; EIL seems to carry the cultural norms of an (imagined/emergent) global citizenry, moulded in the likeness of Western, primarily Anglo cultures. Thus I find it difficult to see why it would be beneficial for a learner not to have a clear concept of what culture(s) she/he is immersed in through the English language classes, namely the Inner Circle countries of Kachru's (1985) model, and why it would not be useful to provide an opportunity for them to gain a more in-depth understanding of these cultures.

My second question was what the content of culture teaching should be. I elaborated on two definitions of culture. The first conceptualizes culture as achievements/products and behaviours, the second one defines culture primarily as cultural representation, as meaning-making through discursive practice. The two definitions provided the cornerstone for the overview of how cultural content has been and is being taught in the EFL classrooms. The currently dominant paradigm of culture teaching, the Intercultural Speaker model, aims to create a sphere of interculturality: the learner is invited to step outside his/her own culture, see it from the outsiders' point of view, while assuming an insiders' view of the other culture. This approach necessitates the teaching of L1 culture alongside L2 culture, in a contrastive fashion, providing a panoramic view of both cultures, in their totality, both their 'Big C' and 'small c' aspects. Recently the content component of the model seems to have shifted from culture-specific to culture-general knowledge, or rather to 'attitude formation', as a response to the challenges of the 21<sup>st</sup> century. This response, though its significance cannot be denied, may prove insufficient in a world where historically rooted 'culture wars' rage between people espousing different cultural representations of the world.

In response to the same challenges, Kramersch (2006) suggested the development of students' symbolic competence. She claimed that given the post-modern, rapidly globalizing and transitory world, the hybrid and/or virtual communities we live in today, it is necessary to nurture in learners the ability to critically appreciate the competing discourses of the world in their historicity (Kramersch, 2013). It is through these discourses that learners have to negotiate a position, an identity for themselves. These discourses transcend the boundaries of nation states, but since the English-speaking cultures of the Inner Circle exert a tremendous influence all over the globe through their economic, military, cultural and political power, it is essential to have an in-depth awareness and understanding of their discourses. Therefore, teaching and learning about L1 cultures - understood here as cultural representations - is a must for learners of the language even if English is used in the world primarily as a lingua franca. The answer to the question of whether target language culture should still be taught even though English serves today as a lingua franca is then a definite yes.

The next question concerned the content of culture teaching at college level. It seems that the 21<sup>st</sup> century calls for a new understanding of culture, which focuses primarily on “culture as shared meaning-making”, the discourse and the discursive practices of a group through which cultural representations are constructed and reconstructed over time. To teach culture as a meaning-making process, which unfolds through time, necessitates an interdisciplinary approach. At the college level this approach may point towards the increased integration of the now separated strands of linguistics, literature and historical/societal studies of English. In the context of public education an interconnectedness of subjects and the teamwork of different subject specialists may help to nurture students’ symbolic competence. The third question was what kind of cultural component should be included in the education of future teachers of English, if any, given that most of their students will only be interested in the instrumental use of the language. I would argue that they do need “symbolic competence”, if we conceptualize their roles as language educators and not just as language instructors.

Nurturing the symbolic competence of learners is certainly a challenge. However, the alternative, instrumentalizing English language teaching, is an option which strengthens a mono-lingual and mono-cultural mindset, which may prove downright dangerous. Let me refer back to another observation of the late Edward Said, whom I quoted in the Introduction and now wish to quote again. This is still about his visit to one of the universities of a Gulf state:

[t]he reason for the large number of students taking English was given frankly by a somewhat disaffected instructor: many of the students proposed to end up working for airlines or banks, in which English was the worldwide *lingua franca*. This all but terminally consigned English to the level of a technical language stripped of expressive and aesthetic characteristics, and denuded of any critical or self-conscious dimension. ....The other thing I discovered, to my great alarm, was that English such as it was existed in what seemed to be a seething cauldron of Islamic revivalism. (Said, 1994, pp.368-369)

This is what happens when the learning of a foreign language is deprived of its cultural dimension: it ceases to serve the noblest of its aims, i.e. learning about ourselves through learning about the Other, and thus strengthening the feeling of our shared humanity.

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# ALL DIFFERENT – ALL EQUAL: NATIVE AND NON-NATIVE TEACHERS

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## Abstract

In my book, *The non-native teacher* (Medgyes, 1994), I argued that non-native-speaking teachers of English were unable to emulate native speakers in terms of their English-language competence. I also claimed, however, that non-natives were in possession of certain attributes that could well offset their linguistic handicap. To prove my point I put forward two sets of hypotheses. Although partly based on empirical evidence, *The non-native teacher* received mixed responses at the time of its publication and afterwards. Some researchers confirmed my assumptions, others called them into doubt. In addition to briefly presenting the gist of the book and its aftermath, this lecture-turned-paper, presented in slightly different forms in about 50 countries, gives a brief overview of developments that have since taken place both concerning the native/non-native issue and English language teaching in general. These developments are recorded in the third edition of *The non-native teacher* (Medgyes, 2017). With a new paradigm looming large, I propose that a fundamental rethink of steps to be taken in language policy and practice is required. My ideas are specified in a ten-point action plan for deliberation.

## 1 Introduction

More than twenty years ago, I had a paper published in the *ELT Journal* (Medgyes, 1992), followed by a full-length book (Medgyes, 1994). As I was working on the two pieces, I had the distinct premonition that I was going to open a can of worms. However, not in my wildest dreams did I imagine that there were going to be so many worms in that can. In those two studies I investigated the differences between native- and non-native speaking teachers of English, for whom I used the acronyms NESTs and non-NESTs.

"Differences? But aren't we all equal?" – I hear you ask. Of course there are far more similarities than differences between the two groups. Some of those similarities are fairly visible, too. Both NESTs and non-NESTs have two ears, two eyes and one nose. We were born thirty, fifty, a hundred years ago, many of us are married with children and, sadly, all of us will die some day. In addition, we share the same ideas, problems and dreams. We often have similar teaching qualifications, length of experience and technical repertoire, too.

"Why highlight the differences then?" – you may ask. Because there *are* differences. And quite a few of them, too. For good or ill, teachers of English fall into two fairly distinct groups: NESTs and non-NESTs.

The aims of my lecture-turned-paper then are

- to compare NESTs and non-NESTs,
- to pinpoint the differences,

- to focus on non-NESTs,
- to touch upon their disadvantages compared to NESTs, but
- to dwell much longer on the advantages they enjoy over NESTs.

However, my primary goal is to give a boost to the self-confidence of non-NESTs. I want them to take pride in being what they are: non-native-speaking teachers of English. In order to clarify what I mean, I advance two sets of hypotheses. Let us start with the first one.

## 2 First set of hypotheses

The first hypothesis underlines that *NESTs and non-NESTs differ in terms of their language proficiency*, with the implication that NESTs are more proficient users of English than non-NESTs. This is pretty obvious since they are native speakers of English, which non-NESTs are not. Their superior command applies to all four skills: listening, speaking, reading and writing.

Let me justify this statement with reference to my own English-language competence. To save time, I shall identify only two of my weak spots, namely listening skills and speaking skills.

*Listening.* I don't understand the jokes of English-speaking stand-up comedians, for example. I have tried several times – in vain. Why? Because comedians say the punchline fast and under their breath. By the time I figure out the joke, the comedian is ten sentences ahead of me. I wish he would slow down and repeat the punchline. Like this:

Have you heard the latest Hungarian joke?  
Careful, I come from Hungary.  
That's... all... right. I... shall... tell... it... slowly... then.

Recently, I watched the American series running under the title *Breaking Bad*. I could not understand a word of it. So after the first episode I decided to watch it with English subtitles, because I wanted to enjoy it.

*Speaking.* With due modesty, I claim to be a fairly fluent speaker of English. Even though I speak English with a *Hunglish* accent, I am more fluent than most non-natives, but not half as fluent as any native speaker of English.

When my son was born, my friends often said: "You're an English teacher, your wife likewise. How lucky your son is! He'll learn English from the cradle!" Nonsense! We kept talking to him in Hungarian. Why? Mainly because we do not know babytalk in English: "Nyuszi-muki! Kicsi boldogságom, angyalbögyöröm!" [Hungarian babytalk] Both my parents were Hungarian and I was 27 years old when I first visited an English-speaking country.

For me, speaking English is like wearing an uncomfortable costume. Too tight, one hundred percent polyester. It is all sham and artificial. Beneath the surface, my utterances are hollow, unsuitable for carrying personal messages. Well-practised holophrases tied together on a string. It is not only that I am less fluent than native speakers, but I am less accurate, less appropriate and less colourful, too. Worse still, I am unable to express my emotions. I cannot give vent to my anger in English, for example.

Let me illustrate what I mean with an anecdote. A few years ago I went to a shop in London to buy a shirt. The shop-assistant asked: "What size?" "I don't know exactly," I stammered. "Men of your age should know what size they are," he said and turned his back on me. Gobsnacked, I found that my subtle English-language competence had evaporated without a trace. Of course in Hungarian I would have known what to say: "A k...va anyád, te rohadt köcsög!" [Oh, you motherf...ing idiot!] Or something similar.

Let us face it, in English I am a boring person. (Maybe in Hungarian too, but that is another matter.) But this applies to everyone who was born to be a non-native speaker of English. They are all dumb and non-NESTs are the worst off!

In order to prove that this is more than the whimper of a pathetic non-NEST, I collected questionnaire and interview data from 325 respondents who came from 11 countries; the ratio of NESTs and non-NESTs was 14 and 86 percent, respectively. And, lo and behold, the overwhelming majority shared my doubts and qualms! This being the case, non-NESTs had better accept with resignation that their English language competence is not on a par with any of their native peers'. Therefore, if native speakers tell you that your English is as good as theirs, do not believe a word of what they are saying. They are either lying, or acting politically correctly, or comparing you to an uneducated native speaker.

NESTs	Non-NESTs
<b><i>Own use of English</i></b>	
Speak better English	Speak poorer English
Use real language	Use "bookish" language
Use English more confidently	Use English less confidently
<b><i>General attitude</i></b>	
Adopt a more flexible approach	Adopt a more guided approach
Are more innovative	Are more cautious
Are less empathetic	Are more empathetic
Attend to perceived needs	Attend to real needs
Have far-fetched expectations	Have realistic expectations
Are more casual	Are more strict
Are less committed	Are more committed
<b><i>Attitude to teaching the language</i></b>	
Are less insightful	Are more insightful
Focus on	Focus on
fluency	accuracy
meaning	form
language in use	grammar rules
oral skills	printed text
colloquial registers	formal registers
Teach items in context	Teach items in isolation
Prefer free activities	Prefer controlled activities
Favour groupwork/pairwork	Favour frontal work
Use a variety of materials	Use a single textbook
Tolerate errors	Correct/punish for errors
Set fewer tests	Set more tests
Use no/less L1	Use more L1
Resort to no/less translation	Resort to more translation
Assign less homework	Assign more homework
<b><i>Attitude to teaching culture</i></b>	
Supply more cultural information	Supply less cultural information

Table 1. Differences in teaching behaviour between NESTs and non-NESTs

I realise that what I have said so far is not very uplifting, so I had better quickly move on to the second hypothesis I put forward. Namely, *NESTs and non-NESTs differ in terms of their teaching behaviour*. On the basis of the collated data, I specified these differences in tabular form (Table 1), which seem to prove that, indeed, NESTs and non-NESTs teach differently (Medgyes, 1994).

The first two hypotheses led me to a third one: *The discrepancy in language proficiency accounts for most of the differences found in their teaching behaviour*. After all, if NESTs and non-NESTs use the language differently, they should teach it differently, too. I considered this cause-and-effect relationship so evident that I did not even bother to seek empirical evidence to confirm it.

Fourthly, I claimed that *NESTs and non-NESTs can be equally good teachers – but each on their own terms*. The respondents in my survey were rather divided on this issue. While nearly half of them agreed, the other half expressed their preference for either NESTs or non-NESTs, in roughly equal proportions.

At this point I could not help asking myself: “How come non-NESTs can be as good as NESTs despite their linguistic handicap? What gives non-NESTs a competitive edge? Surely, this is only possible if they have certain attributes that NESTs lack. OK, but what exactly are these attributes?”

### 3 Second set of hypotheses

In order to be able to answer these questions, I advanced a second set of hypotheses, which displays the bright side of being a non-NEST. This time, however, I dispensed with empirical research. Instead, I relied upon my personal experience and intuition, and picked the brains of a few fellow teachers. Let me briefly elaborate on each of these hypotheses.

My first claim is that *non-NESTs can provide a better learner model than NESTs*. They did not *acquire* the English language – like their NEST colleagues. They *learnt* it at school – just like their students. Shedding tears of anguish in the process. In a sense, NESTs are *inimitable* models – non-NESTs are *imitable*. For non-NESTs, native speaker proficiency is a mirage. What they *can* set as a realistic goal is a high level of non-native speaker proficiency.

At this point one may ask: “But is there a correlation between linguistic performance and teaching performance?” My tentative answer is yes, but I am also aware that success is a complex issue. There is more to it than mere language proficiency. Teaching qualifications, experience, personal traits, motivation, love of children, and so on. What I am suggesting is that a good command of English is a necessary but not a sufficient condition for successful teaching. If language proficiency were the only attribute that mattered, NESTs would be better teachers by definition – which they are not!

Now here is my second assumption: *Non-NESTs can teach language learning strategies more effectively than NESTs*. Non-NESTs were language learners and still are. Successful language learners, into the bargain. If they were not, they would not have become language teachers, would they? They are conscious of which learning strategies have worked for them and which ones have not. They know every twist and pothole in the road that leads to proficiency in English. NESTs have never gone down that road. Certainly not with respect to learning English. Given this, I claim that non-NESTs are better at making their students’ learning process effective, fast and easy. Relatively easy, that is.

My third argument is that *non-NESTs can supply more information about the English language than NESTs*. As I pointed out earlier, non-NESTs know less English than their native peers. On the other hand, they know more *about* English than their native

counterparts do. A lot more. They have amassed huge amounts of information about the English language during their own learning process. For instance, they are aware how difficult it is for a foreigner to use the word *enough*. Here are a few examples:

My car is *big enough*.

(*Enough* always comes after an adjective.)

There are more than *enough cars* on the roads of Budapest.

(*Enough* always comes before a noun.)

My Mazda isn't a *big enough car* for our family.

(If there is an adjective–noun combination, *enough* comes after the adjective but before the noun.)

There are more than *enough big cars* on the roads of Budapest.

(*Enough* always precedes an adjective–noun compound.)

This should be *explanation enough* of why the mayor of Budapest is considering introducing a congestion charge in the city centre.

(*Enough* after a noun?! This I find too hard to explain.)

Or here is a typical Hunglish mistake:

Christopher:	Did you know that Brad Pitt was 55 last year?
Péter:	Wow! She looks much younger.
Christopher:	She?! But Brad Pitt is a man!

As we all know, in Hungarian there is only one personal pronoun to cover all three genders. Therefore, we constantly confuse 'he', 'she' and 'it'. Christopher may not be aware of this – I am.

This brings me on to my fourth point: *Non-NESTs can anticipate and prevent difficulties more effectively than NESTs*. NESTs are better at telling what is *right* or *wrong* in English – non-NESTs are better at perceiving what is *easy* or *difficult*. The latter are equipped with special antennae, a kind of sixth sense. They can predict what is likely to go wrong even before their students open their mouths. NESTs cannot. This is an asset, but a risk too. "Wrong! Wrong again! And again!" Non-NESTs tend to overcorrect and penalise every single mistake. What a shame!

Fifthly, I argue that *non-NESTs show more empathy to the needs and problems of students than NESTs*. This is not to say that non-NESTs were born to be more empathetic than NESTs. In the language classroom, however, they can automatically slip into their students' shoes, because they come from the same linguistic, social, cultural and educational background as the students. They have a pretty clear picture of how the students feel, and what they talk, think and dream about. They can often understand each other with the wink of an eye. NESTs cannot, simply because they come from a different culture.

Finally, I assume that *non-NESTs can benefit from the students' native language*. For a long time, the monolingual principle was never challenged. The native language was all but expelled from the language classroom, but it has made a comeback in recent years. This being the case, non-NESTs have an enormous advantage over NESTs – provided that the group they are teaching happens to be monolingual.

Let me briefly summarise the overall message of the six hypotheses I have put forward. What it all boils down to is that the linguistic deficit of the non-NEST is a blessing in disguise. It is a strange paradox that it is precisely this deficit that helps them develop capacities that NESTs cannot even hope to possess.

#### 4 Critical responses

At the beginning of my paper I referred to the can of worms. Well, after my first publications on the NEST/non-NEST issue came out, I was fiercely attacked from various quarters. Linguists rejected the division into natives and non-natives. "Can anyone define who is a native or a non-native," they asked. And their answer was a resounding no. A vehement opponent of the native/non-native speaker separation, Paikeday (1985) went so far as to lend his book the title *The native speaker is dead!*

Although I readily admit that the native/non-native dichotomy does not stand up to close scrutiny, the majority of teachers still fall into either this or that category. Who would query, for instance, that I am a non-native speaker of English whereas Christopher is a native speaker? Mind you, there are lots of other things in the universe which defy clear cut definitions. The philosopher Popper (1968) said, for example, that if physicists in the 19th century had been bogged down in the definitional problems of the phenomenon 'light', the electric bulb might never have been invented. As if to close the polemic, the famous linguist Halliday (as cited in Paikeday, 1985) quipped that the native speaker is a useful term, precisely because it cannot be closely defined.

Up rose the stalwarts of the P. C. movement, too. They objected to the prefix 'non' in the term 'non-native', stressing that it had a pejorative ring to it. "No human being is inferior to another. We are all equal," they protested. But who said non-NESTs are not equal? Different does not imply *better or worse* – different simply means *different*, with no value judgment attached to it. All different – all equal!

Another band of critics consisted of teacher educators and their ilk. They complained that while I scourged non-NESTs for their linguistic shortcomings, I gave short shrift to other attributes, such as teaching qualifications, length of experience, individual traits, level of motivation, love of students, and many more. Let me make it clear: I do set high store by these other attributes. I paid them little tribute merely for research purposes: the validity of a statement can be proven only if all variables, except for one, are kept constant. Which in this case was language proficiency. All I claimed was that *all other things being equal*, the better a non-NEST speaks English, the better teacher he or she is likely to be.

However, my most vociferous opponents were non-NEST advocacy groups. They fumed that the separation of the two groups fuelled discriminatory practices against non-NESTs. And they were right, too! It is a sorry fact that applications for teaching posts from even highly qualified and experienced non-NESTs often get turned down in favour of NESTs with no comparable credentials. Yet, I doubt that this is an overriding concern in most parts of the world. The percentage of non-NESTs in search of a teaching job in English-speaking countries is relatively low. Non-NESTs typically work in EFL environments at home and not in ESL contexts abroad. Anyway, forcibly removing the label 'non-NEST' is no more than window-dressing. Like it or nor, NESTs and non-NESTs are different species.

#### 5 On the credit side

For all the backlash, I believe that my efforts paid off, because they set off an avalanche of research on this conundrum. Replicating my studies, many researchers confirmed or fine-tuned the conclusions I had arrived at (Braine, 2010; Llorca, 2005; Mahboob, 2010). Others, following different research agendas, provided new perspectives and generated novel ideas, including quality issues (Medgyes & Kiss, 2019), as well as perspectives concerning NESTs who live and work abroad for extended periods of time (Kiss & Medgyes, 2019). In addition to scores of research papers published in professional journals, about a dozen full-length books on this topic have

been published in the past 20 years. Be that as it may, the study of the NEST/non-NEST issue has come into its own.

Furthermore, non-NESTs, who had seldom made their voices heard in the past, were prompted to contribute to this line of research – and they did, ever so eagerly! This was a niche which offered them plenty of opportunities to win recognition in the academic world. Braine is right in noting that this development is “an indication of the empowerment of [nonnative] researchers who are no longer hesitant to acknowledge themselves as [nonnative speakers], and venture into uncharted territory” (2010, p.29).

Finally, and most importantly, I like to think that my studies, but especially the follow-up lecture I delivered in many parts of the world, succeeded in boosting non-NESTs’ self-confidence. The message that it is not a shame to be a non-NEST seems to have gone down well. Non-NESTs would often come up to me after my lecture, saying that from now on they would take pride in who they were.

## 6 When NESTs reigned supreme

Let us now take a look at what the ELT operation was like before the non-NESTs’ self-awakening process began. From time immemorial, native speakers were regarded as models of the proper use of English that every learner was expected to imitate. Needless to say, non-native *teachers* were the worst off; after all, for them an excellent command of English was – and still is – a good predictor of professional success. Since there is no way they can emulate NESTs in terms of language proficiency, many of them have developed a more or less serious form of inferiority complex. This nasty feeling is well expressed in the title of a paper, *Children of a lesser English* (Mahboob, Uhrig, Newman, & Hartford, 2004), which is a paraphrase of the American movie, *Children of a lesser God*.

In his hotly debated book, Phillipson (1992) introduced the Centre/Periphery dichotomy. To the ‘Centre’ belong powerful English-speaking countries in the West, while the ‘Periphery’ mostly consists of underdeveloped countries, where English is a second or foreign language. Another construct, similar to Phillipson’s, is the BANA/TESEP distinction created by Holliday (1994). While ‘BANA’ typically comprises private sector adult institutions in Britain, Australasia and North America, ‘TESEP’ includes state education at Tertiary, Secondary and Primary levels anywhere else in the world.

Both authors pointed out that since ELT was an extremely profitable business, organisations and individuals in the Centre/BANA had high stakes in monopolising its operation. NESTs and their accomplices considered themselves not only the sole repository of the English language but also the gatekeepers of ‘proper’ ELT methodology, even though their ideas had no roots in, and were often inimical to, the educational traditions of the Periphery/TESEP. We were inundated with flashy course materials, ‘wandering troubadours’ (to use Alan Maley’s term, personal communication), jet-in/jet-out teacher trainers and backpack teachers. They all arrived from the ‘hub’ to act the smart Alec. Regrettably, for a long time non-NESTs accepted NEST superiority unconditionally, giving preference to imported products over home-grown goods.

## 7 Paradise lost

How about today? Has anything changed since the first publications on the NEST/non-NEST issue saw the light of day in the early 1990s? My answer is a definite yes. To begin with, today non-native speakers of English far outnumber native speakers: according to rough estimates, only one out of three speakers of English is a native speaker (Crystal, 2003). This being the case, the question of ownership inevitably

arises: Can a minority group, that is, native speakers of English, retain their hegemony and continue to arbitrate what is right and what is wrong in language usage?

Widdowson's answer is unequivocal:

Native speakers should no longer be considered the true custodians of the English language, which they can lease out to others, while still retaining the freehold. Other people actually own it (1994, p.385).

By the way, as early as 1977, Povey reported on an illuminating example of disobedience:

An African student, after he was criticised by the native-speaking teacher for using a non-standard form, burst out like this: "It's our language now and we can do what we like with it!" (1977, p.28).

According to this line of reasoning, any non-native speaker who engages in genuine communication in English with a native or non-native partner is entitled to use it creatively. They have every right to mould the English language until it becomes for them an adequate tool of self-expression. Hundreds of studies support Widdowson's (1994) doctrine against what Phillipson (1992) called the 'native speaker fallacy' – none states the opposite.

Graddol is even harsher in his judgment when he says:

[N]ative speakers may increasingly be identified as part of the problem rather than the source of a solution. They may be seen as bringing with them cultural baggage in which learners wanting to use English primarily as an international language are not interested (2006, p.114).

To cut a long story short, it seems that native speakers are rapidly losing the pride of place they once occupied.

## **8 English as a lingua franca**

There are two areas which have generated a great deal of interest in recent years. One of them is "English as a lingua franca" (ELF) (Jenkins, 2000; Seidlhofer, 2011; Sowden, 2012). Scores of studies have attempted to disentangle the complexities of ELF, both as a social phenomenon and as a language variant. However, while acknowledging the socio-educational value of such efforts, I have certain reservations about their legitimacy. Until I have seen "The Grammar of ELF", I cannot give it full credit and, therefore, I can hardly advise learners of English and their teachers to throw away the 'good old grammar book'. There is no better way, for the time being, than to turn to the native speaker norm "as a benchmark against which to monitor output" (Kirkpatrick, 2007, p.191).

## **9 Young learners**

The other area that is gaining momentum has to do with the recognition that learners of English are getting younger. In more and more countries, English is introduced as early as lower primary school and even kindergarten. It looks as if English is catching up with the 'three R's' (reading, writing and arithmetic) as a basic skill, thus becoming a second, rather than a foreign language in the school curriculum.

Obviously, the job of teaching the young poses new challenges, which the ELT profession cannot yet meet. This concerns both teacher supply and methodological expertise. Today we need a lot more teachers who are intimately familiar with the local educational environment than ever before. And let me reiterate: NESTs are less capable of coming up to these expectations than their non-native peers.

Suffice it to say, the traditional EFL model is in decline (Graddol, 2006), and NESTs, the last bulwarks of native speaker supremacy (Braine, 1999), are losing ground at an ever faster speed. This is a welcome trend in view of the fact that the overwhelming majority of the ELT profession consists of non-NESTs in most parts of the world.

## 10 Action plan

What is to be done then? With a new paradigm looming large, I believe that a fundamental rethink of steps to be taken in language policy and practice is required. Teacher trainers, in particular, bear an increased responsibility for helping prospective teachers to adapt to the rapid transformation of education. It is with these considerations in mind that I propose a ten-point action plan. Whereas some of these points have been touched upon in this paper, others are waiting to be put on the agenda of ELT experts and decision-makers.

1. An *adequate teacher supply* to satisfy the exponential growth of demand for English should be ensured.
2. Work on establishing norms of *English as a lingua franca* use should be intensified.
3. More heed should be paid to the needs of *young learners*.
4. The scope for *content and language integrated learning* in schools should be broadened.
5. *Information and communication technology* should be factored into the curriculum of teacher education.
6. *Awareness of cultural and intercultural issues* should be accorded greater prominence in teacher education programmes (Holló, 2014).
7. The integration of *classroom and out-of-school* learning opportunities should be reinforced.
8. *Language improvement courses* for non-NESTs should constitute a fundamental component of teacher education curricula.
9. NEST job applicants prepared to *stay for an extended period of time* in the foreign country should be prioritised.
10. Enhanced opportunities for *NEST/non-NEST cooperation* should be created.

## 11 Conclusion

I am pleased to witness that the self-awakening process of non-NESTs is well underway. Native speakers are no longer in a position of unchallenged authority. They are no longer regarded as custodians of the ‘proper’ use of English and the gatekeepers of ‘proper’ ELT methodology. Today, NESTs and non-NESTs own this language in equal measure. Both may use it creatively and work in the classroom at their discretion.

However, it would be unfair to leave two burning questions unanswered. Here is the first one: “Who is worth more, the NEST or the non-NEST?” Based on the hypotheses and the line of reasoning presented in this paper, the answer is obvious: In principle, NESTs and non-NESTs serve equally useful purposes – but each in their own ways. While qualification and experience carry a lot of weight for either group, NESTs and non-NESTs are also faced with challenges of a different nature. Therefore, instead of disregarding or blurring these differences, the researcher’s job is to identify and shed light on them.

The second question runs like this: “Who is the ideal NEST and the ideal non-NEST?” I believe that the ideal non-NEST is one whose command of English is at near-native level. Let us not delude ourselves: a high level of language proficiency remains a make-or-break requirement in the language teaching profession. At the same time, the ideal non-NEST should be well-versed in the culture, or rather cultures (in the plural), of not only English-speaking countries but potentially that of the whole world. It should be borne in mind that today we live in a globalised world in which cultural exchange is a matter of both principle and expediency.

On the other hand, the ideal NEST is a professional who has a good command of the local language, especially if they plan to spend an extended period of time in the foreign country of their choice. I fully agree with Richardson (2016), who said in a recent plenary lecture: “Beware! There are two disadvantages in global arrangements: (1) not knowing English, and (2) knowing *only* English”. Concomitantly, the ideal NEST has sound familiarity with the local culture as well. Their differences notwithstanding, what ideal teachers, whether NESTs or non-NESTs, have in common is a multilingual and multicultural attitude which they display in the classroom and beyond.

In the final analysis, then, NESTs and non-NESTs may turn out to be equally good teachers, because their respective strengths and weaknesses balance each other out. Since each group can offer competences of which the other group is in short supply, the ideal school is one in which there is a good mix of NESTs and non-NESTs, who work in close collaboration with one another.

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# **BREXIT: WHAT DOES IT ACTUALLY MEAN AND HOW CAN IT BE EXPLOITED IN THE FOREIGN LANGUAGE CLASSROOM?**

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## **Abstract**

When the result of the so-called Brexit referendum became known early on the morning of 24 June, 2016, it had a profound effect on British society. Not only did it expose and exacerbate some existing fault lines in different parts of Britain, but it also became the number one topic of conversation in the media and on a day to day basis in people's homes. Perhaps inevitably, the ongoing arguments over the meaning of the referendum result and the future course of the United Kingdom has come to exert a huge influence over the culture and language of the four countries involved. This paper will first give an overview of the events leading up to and following the referendum and then focus on the main ideas which have come to dominate the Brexit conversation on a public and personal level, examining such terms as Brexiteer and Remainer, hard and soft Brexit, the Irish backstop, the People's Vote and so on, through authentic texts. The paper will then look at how the fascinating phenomenon of the Brexit debate can be exploited in the foreign language classroom using existing approaches to the teaching of culture and finish with some practical suggestions for activities in the EFL context.

## **1 Introduction**

On the morning of 24 June, 2016, the world awoke to the news that the result of the so-called Brexit referendum was an unexpected one, even though a close result had been predicted. In fact just over fifty-one percent of the voters (17,410,742 million (51.9%) to 16,141,241 million (48.1%) on a 72.2% turnout (The Electoral Commission)) had chosen to leave the European Union (EU). The surprise, indeed shock, was widespread due to the unexpected result. The predictions in the media in the final days of campaigning and the last polling figures before the actual vote had all indicated that the UK would vote to remain. The immediate effect was dramatic. David Cameron, the Prime Minister, who had led the unsuccessful remain campaign (Britain Stronger in Europe), announced his resignation within hours of the result being confirmed, having previously promised to remain in office even if he lost the vote (Watt, 2016). This immediately set off a leadership contest to select the next leader of the Conservative party and the new Prime Minister, which was resolved on July 13 when Theresa May was the sole candidate left standing. Then began a long and tortuous process of negotiating with the EU to agree the terms on which the UK would leave. It was the difficulty of this process and the failure to get approval in the UK Parliament for the deal she had negotiated that eventually led to the end of May's own leadership, announced in May 2019. Politically the situation remains unclear as Britain waits to see who the next leader will be more than three years after the referendum.

In the country at large the immediate effects were confused as people began to take stock of what had happened and what it might mean. One sign of this was the google search trends following the result being announced, with a spike in searches for topics relating to the EU and Brexit (Google trends, 2016; Selyukh, 2016). More alarmingly there was also a spike in reported racist incidents in the following days and weeks (although the causes and indeed reality of this increase in hate crimes has been disputed (Civitas, 2016; Schilter, 2019) and this reflected one of the central campaign topics leading up to the vote which was immigration and how to control it. The media in all its forms has continued to play a prominent part in keeping the topic of Brexit in the public eye and frequent polling suggests that the division between those who want to leave and those who want to remain continues to be stark, although more recent polls indicate that the proportion of those wishing to remain in the EU may be increasing. There have also been several major anti-Brexit protests around the UK with the biggest occurring on 23 March, 2019. The purpose of this march, organised by the People's Vote campaign group, was to call for a second referendum and the turnout was estimated to have been in the hundreds of thousands, possibly even a million according to the organisers (Full Fact, 2019). The People's Vote group is itself formed of nine different anti-Brexit groups and is a good indication of the continuing effect of the original referendum to promote grassroots activism and protest throughout the UK and of the growing discontent on all sides with the political deadlock in Parliament. Again it is unclear how this discontent and division within British society will affect relationships between different groups and between the constituent parts of the UK.

Not only has the result had a profound effect on UK society, but it has also caused great anxiety for EU nationals living and working in the UK and for young people from other EU states thinking of working or studying in the UK. Moreover, in Hungary and many if not all of the countries around it, the variety of English taught in the classroom is usually British and the coursebooks used to teach it are written largely by British writers and give a British viewpoint, not to mention featuring cultural topics that are typically oriented towards British culture. This raises the question of how Brexit may affect students' views of British culture and language. At the very least, the overriding importance of the ongoing national debate about the UK's future course and its relationship with the rest of Europe is something which would be strange to ignore in any classroom in which there is a focus on British culture. Therefore, the aim of this paper is to explore ways in which the topic of Brexit can be explored through a language and cultural lens: to break it down and show how it might be handled in the classroom. First, though, some context will be given to enable an understanding of the issues underlying the referendum and the larger debate about Britain's relationship with the EU.

## **2 Historical background to the referendum**

The United Kingdom joined the European Communities, the predecessor of the European Union, in 1973, and its membership was endorsed by a referendum in 1975. At the time of its entry, necessitated by economic imperatives, there was a feeling in more conservative quarters of reluctance to accept that Britain was no longer an imperial power and was compelled to join a trading bloc with other European countries to maintain its status (Davies, 1997; James, 1998). Over the years since then the UK has been a core member of the EU, playing a crucial part in the drawing up of treaties and charters, and becoming one of the most prosperous of its trading partners. However, in the 1980s under the Premiership of Margaret Thatcher, there was a rising wave of Euroscepticism in British politics as the EU sought to change the nature of the contract between its members to one not only of trade but of a closer political union. This Euroscepticism was exemplified most famously and starkly in Thatcher's scathing dismissal of Jaques Delors, then President of the European

Parliament, and his idea of giving the administrative bodies of the EU more power (Thatcher, 1990). Ironically, it was this speech that precipitated the end of her own period in power a few days later.

Following Thatcher, the Eurosceptics gained more and more prominence, leading to the formation of the right-wing UK Independence Party (UKIP) in 1991 and a widening rift within the Conservative Party between pro-EU members and Eurosceptics (some of whom even formed their own group, the European Research Group, in July 1993, the sole aim of which is to support the UK's withdrawal from the EU). Succeeding Tory leaders have experienced increasing pressure from within and without from the Eurosceptics and it was this pressure that led then Prime Minister David Cameron to promise to hold a so-called in-out referendum on the UK's membership of the EU after the 2015 general election. Cameron hoped that the referendum would enable him to solve the problem of the constant dissent from the back benches within the Conservative Party over Britain's membership in an increasingly integrated EU and the external electoral threat represented by Nigel Farage's UK Independence Party (UKIP), whose single issue was to be independent of Europe (Glencross, 2018). He was confident of victory and ran a campaign based on the severe economic damage that would be done by leaving, which was characterised as Project Fear by the Leave campaign, a term first used in the 2014 referendum on Scottish Independence and reintroduced with great effect by Boris Johnson (Jack, 2016). In contrast, the Leave campaign appealed to a patriotic belief in British strength and love of freedom, and made a series of promises about the economic benefits of being independent, most notably on the side of the famous red bus, which was painted with the promise of 350 million pounds extra every week to spend on the National Health Service (Merrick, 2017). In the end, it was the promises and positive message of the Leave campaign combined with a distrust of the political elite, especially in the North of England (Glencross, 2018), along with immigration fears stoked by UKIP (Hall, 2016), that won the day.

These are the basic facts which led to the result announced on the 24 June in 2016, but of course the actual causes of that result are far more complex and are still being argued about as I write. The aim of this paper, however, is not to explain or propose a theory of why it happened, but rather to gain a deeper understanding of what the vote and its consequences may reveal about the culture of Britain today and show how that understanding can be exploited in the language classroom in the form of intercultural learning activities. The next part of the paper will attempt to define Brexit as a cultural phenomenon and make it easier to comprehend by breaking it down into constituent elements using an existing approach (Moran, 2001) to teaching culture.

### **3 What is Brexit? Beginning to get a grip on a complex cultural phenomenon**

Giving even just a cursory overview of the political and cultural context in which the June 2016 referendum took place is not easy to do, but for an English language teacher in another country, possibly even on another continent, it is a daunting task and one which may seem impossibly difficult and off-putting for her students. Therefore, the question of just how to approach the topic in order to make it both accessible and interesting arises. Of course, this is the same challenge which is posed when dealing with any aspect of a seemingly strange and largely unknown culture. One way of dealing with this problem is to break it down into constituent parts or components and use them to help learners work with the content and so get to understand the cultural phenomenon better. Moran (2001) outlines just such an approach to the teaching of culture in the language classroom and it is his model of the five dimensions of culture which I have chosen to use in this paper, primarily for its clarity and ease of application. Taking the example of a drive-through restaurant, a common cultural phenomenon in his own culture (the

United States), Moran shows how using the five dimensions of products, practices, communities, persons and perspectives can help to “develop a more profound and informed picture of a culture” (p.26).

Even though Brexit is a far more complex and wide-ranging phenomenon than a drive-through restaurant, I will apply the same five dimensions to it and, as Moran goes on to do (Moran, 2001, p.35), look at how for each dimension language forms an integral part and also consider the possibilities in terms of language learning.

### 3.1 Products

Moran (2001, p.25) states that the products connected to a cultural phenomenon “are all artifacts produced or adopted by the members of the culture” and they can be tangible and intangible. Arguably the first tangible product of Brexit was the referendum question itself: “Should the United Kingdom remain a member of the European Union or leave the European Union?” (European Union Referendum Act, 2015). It was created by civil servants and is interesting to look at in terms of how such an important question should be asked. In fact, forming this particular question was far from a simple process and itself involved a process of argument and compromise between the interested parties (Electoral Commission, 2017: Green, 2017). The final form of the question has been criticised for a number of reasons, among them being that it offered the illusion of a simple choice to a highly complex reality (Colignatus, 2017). However, as an artefact it offers great potential for analysis and discussion, and through that deeper understanding of the issues involved in making such a momentous decision.

The other products of Brexit, both tangible and intangible, are both extremely varied and extremely numerous. In the media thousands of hours of interviews and millions of words of reporting have been produced and continue to be produced. Some media organisations, such as the Guardian, the BBC and the Independent, are freely accessible on the net, and many interviews and discussions are available online on YouTube. There are also many short explainer videos produced by media outlets and individual content creators. One of the most useful for teachers may be the TLDR News channel (n.d.), which has numerous short videos explaining all aspects of Brexit in clear and easy to follow language with subtitles. These are suitable for intermediate level students and above. It also has useful explainer videos on other political issues in the news.

Other tangible but less obvious products are billboards and cultural jamming in the form of art works. Some of the most interesting examples which have been inspired by Brexit are the ‘guerrilla’ billboard posters begun by a group of four friends calling themselves ‘Led by Donkeys’ in reference to a poem about the soldiers who were sent to their deaths by incompetent generals in the First World War (Sherwood, 2019), the provocative stencils of the street artist Banksy (Munoz-Alonso, 2017), and the satirical digital collages of Cold War Steve (Gurney, 2019). Another interesting set of products are the banners and placards used by anti-Brexit and pro-Brexit protestors, and these, of course, rely principally on language for their effect, often making clever use of puns and other forms of wordplay. All of these are easily accessible on the net and could form the basis of interesting visual literacy activities and promote vocabulary building at the same time.

The unique language of Brexit is itself a product, one which is continually being created and changed. The original term, Brexit, made up of the words Britain and exit, based on the existing word Grexit (used to describe Greece’s potential withdrawal from the euro), actually appeared before the referendum was even discussed (Moseley, 2016). Other similar words have been generated in the media or in political debate, such as Brexiteer, coined to make Leave supporters sound more exciting,

and Remoaner and Remainiac (both derogatory terms) used to make supporters of remain seem like bad losers (Seargeant, 2017). Some terms, such as the Irish backstop, describing the mechanism necessary to prevent a hard border between the Republic of Ireland and Northern Ireland which would threaten the Good Friday Agreement signed to end the hostilities in Northern Ireland<sup>1</sup>, come from the official negotiations between the UK and the EU. Still others, such as hard and soft Brexit, which describe more extreme and less extreme versions of a withdrawal from the EU, have been coined by politicians or their advisors (Sims, 2016). The ever-increasing lexicon of Brexit has given rise to many glossaries of key terms including one by the House of Commons itself (House of Commons Library, 2019). Many of these words could be used in class as the starting point for engaging language activities.

### 3.2 Practices and communities

It is difficult to talk about practices in relation to Brexit as distinct from the communities in which those practices occur, so I have chosen to deal with these two dimensions at the same time. The most obvious community involved is the political one and they have a whole set of practices which could be interesting to look at for learners and for them to compare with their own political system. The House of Commons and the House of Lords in particular are a relic of Britain's past both in image and in practice and have many curious customs and obscure traditions. As an object of study in itself, students may find these strange traditions and ways of working of interest, especially when compared with their own parliament. TLDR News (n.d.) has several short videos explaining how the UK parliament works and similar videos about the EU can also be found on YouTube. These could be used in class or students could watch them at home before discussing them in class.

Another type of community is the mass media and here there are a range of practices apparent related to the different forms of media, from television news broadcasts with their particular format and style differing between companies, interview and debate programmes, such as Question Time on the BBC, to traditional print journalism, which now is more often read online than in printed newspapers. There are also various independent media entities, such as political bloggers and YouTube channels, all offering comment and explanation of current events. All of these can be used as authentic texts for students to analyse and discuss, and also use as models for producing their own texts or staging their own debate.

Communities can also be seen as "the special social contexts, circumstances, and groups in which members carry out cultural practices" (Moran, 2001, p.25), and these can be very large groups, such as national cultures, or "more narrowly defined groupings" (p.25), even as small as colleagues at work and the family. For students, it might be interesting to look on the one hand at the different nations and regions in the UK and see how they differed in their voting patterns and also what makes them different in terms of their local practices and ways of life, and on the other hand at smaller groups such as voluntary organisations and protest groups, as well as individual families who have been divided by Brexit and have to find ways of dealing

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<sup>1</sup> The Irish backstop is an insurance policy to prevent a hard border (i.e., a border with physical infrastructure) between the Republic of Ireland and Northern Ireland which was part of the withdrawal agreement reached by Prime Minister Theresa May and the EU. It would mean that the UK would stay closely aligned with the EU's trading systems until a final deal could be agreed. The fear that the return of a hard border between Ireland and the UK could lead to renewed violence between Protestant and Catholic extremists (nearly 3600 people were killed in the Troubles, which were brought to an end by the Good Friday Agreement in 1998) is because it would lead to increased tension between the countries and the border checkpoints would again become targets for paramilitary groups.

with their different viewpoints. There are many interesting video and written reports about this topic (see, for instance, Channel 4 News, 2018). Generation and social class are also ways of distinguishing communities, and these two groupings have particular relevance for Brexit and therefore are interesting to explore with students, particularly in terms of their differing perspectives (see 3.4). A possible classroom approach to understanding such differing perspectives might be, following some initial research, to organise roleplay activities of families split by their differing views of Brexit. Each group could be asked to roleplay a family from a particular area of the UK and be asked to create their roles based on their research.

### 3.3 Persons

According to Moran (2001), this dimension constitutes “the individual members who embody the culture and its communities in unique ways” (p.25). The most important persons associated with Brexit can be identified both in a general sense and also specifically, in the form of a relatively small number of key players. In a general sense, the main persons involved are the politicians and the voters (the electorate). The politicians were responsible for bringing the referendum into being and for passing the motions and laws connected with its implementation and then for arguing about and debating on how to follow through on the result. Another group of politicians are the EU leaders and members of the negotiating team responsible for reaching an agreement with representatives of the Conservative Government on how the UK will leave the EU. From the politicians, it is possible to single out certain key individuals: there is the previous UK Prime Minister, David Cameron, who promised to hold an in-out referendum if he won the 2015 general election, the Prime Minister who replaced him, Theresa May, who had to take charge of the situation following the unexpected result of the referendum, and there is the President of the EU Commission at the time, Jean-Claude Juncker, the most senior representative of the EU, and the head of the EU negotiation team, Michel Barnier, along with the several British politicians he has had to negotiate with. However, the list of politicians who have had a significant influence in the unfolding story of the Brexit vote is too long and too complicated to list here, and continues to grow.

As for the voters, it might be thought that their role ended with the referendum itself but this is not at all the case in part due to a third group of persons, that is, the persons of the media. Rapidly following the result of the referendum, the media became fixated with the reasons for the result and then what the result might mean in terms of the UK's future. The voters, as well as those who had not been able to vote because they were not yet 18, then became objects of interest and have continued to be so. Interviews continue to be made with ordinary people in all parts of the UK. Many voters and young people who were not able to vote have now become campaigners or protesters on both sides of the argument. Frequent polling done by professional organisations also tries to measure the current views of the electorate to see how opinion might be changing and what the result of the next election or a second referendum might be.

Not many voters or even campaigners have achieved individual recognition but there are some business people, former politicians and celebrities that have become prominent for supporting one side or the other or for trying to force politicians not to take Britain out of the EU without a negotiated deal (Brexit: Campaigner Gina Miller threatens no deal court battle, 2019). Doing some research about some of these people could be an interesting way to engage students in finding out more about the basic arguments for and against Brexit.

### 3.4 Perspectives

This is perhaps the most interesting but also the most complex dimension to consider. The perspectives which underlie the phenomenon of Brexit are many and consist of the beliefs and attitudes of all the different communities and persons involved. These perspectives are often implicit rather than explicit and as such they provide an interesting task for students to try and work out. Using the many different products available students can begin to build up a picture of some of the perspectives of the different groups and individuals. Interviews, speeches and debates are one way of exploring different perspectives but another way which is potentially engaging is to look at what ordinary people say about Brexit. The best way to do this would be to actually speak to people in the streets but as EFL students do not often have this opportunity, then video interviews are the next best thing. *Brexitannia* (Karykalin, 2017), a documentary film made by an Australian film maker, is a particularly useful resource in this regard. The first part consists of monologues to the camera by ordinary people in their home or the streets of their town from all over the UK about what they think of Brexit and taken together it gives many different perspectives which can be the basis of classroom work. And once students have got the idea of interviewing people, they can make their own interviews in their own town on similar or different issues. This idea will be discussed along with several other ideas for practical classroom activities in the next section.

## 4 Brexit in the language classroom

This section will look at some practical suggestions for teachers to help their students gain an understanding of what Brexit is and how it may be relevant to their own lives. The activities will be aimed at upper secondary level (15-18 year olds) and will draw from all the dimensions already discussed in the previous section. I will begin with very simple activities based on the language which has been produced by Brexit and then more complex activities will be outlined using ideas from the other cultural dimensions as well. As the activities become more complex, the opportunities for self-reflection and for comparison with aspects of the students' own culture will become more pronounced. These activities will involve research, presentations, debates, role play and critical analysis of texts.

### 4.1 Playing with the language

As already mentioned, Brexit has produced its own lexicon and many of these words are the result of invented language. Brexit itself is a portmanteau word (a word consisting of two words combined to make a new word) and many other Brexit terms are the result of different kinds of language play. These words can be the object of study in themselves but students can be asked to make up new words for other countries (along the lines of Grexit and Brexit) and play around with words such as Brexiteer and Remainiac to describe different types of people. By analysing slogans and placards used in the campaign and in the protests following the referendum, students can also learn how to play with language in different ways and even be given the opportunity to make up their own slogans and banners about different topics that might be relevant to them.

## 4.2 Discourse analysis of texts

The referendum question itself can be the basis of some interesting critical analysis for students, asking them to consider what the problems are with the question and then come up with an improved version. They can also be given the task of writing similar questions about a current issue in their locality or even within their school or class and then deciding whose question is the best and why.

Short news stories and articles are a staple of English language teaching activities and there are a wide variety of language analysis exercises that can be done based on news reports. A particularly useful resource in this regard is Danuta Reah's (2002) book on working with the language of newspapers. Students' visual literacy can also be engaged by analysing YouTube videos of television news and interviews and looking at studio design, graphics and body language and discussing the intended meanings or underlying messages they may have. Students can then be given the task of writing their own articles and recording their own news broadcasts or interviews. These kind of tasks could be approached in many different ways, for example, by asking the students to write articles or do interviews about current events of interest to them or by asking them to compare articles or broadcasts about the same topic (it could be connected to Brexit or any current issue in the news) from an English-speaking source and from a source in their own language and present their findings.

## 4.3 Doing research

Students can of course be given research topics to work on in a traditional project based learning approach. These could be based on their own choice with some guidance, for example, students could be given the task of explaining a particular aspect of Brexit such as the Irish backstop or the difference between hard and soft Brexit. Another option would be to ask students to choose an important person connected to Brexit and give a presentation explaining the part they have played. Students could be offered a list of persons to choose from with a little information about each. Still another project idea could involve researching the different perspectives of groups involved in Brexit, for instance, students could find the main arguments used by the Vote Leave campaign and the Britain Stronger in Europe campaign and present them, or they could be asked to present the main concerns of the EU regarding any deal with the UK to leave.

All of these research projects could be done in groups, thus promoting collaboration. Another kind of research which could be engaging and involve plenty of authentic language practice for students would be doing fieldwork and recording short interviews with people on topics such as their view of the EU. Of course, this might not be possible to do in English if there were no English speaking tourists available to students to interview (this is not usually a problem in capital cities but would obviously be difficult or impossible in smaller towns). However, vox pop (voice of the people) type interviews could be done in the students' mother tongue and then the students would need to translate the interviews or present a summary in English, thus giving them further valuable practice. Using digital technology, they could even edit their videos so that the translated voiceover would be heard. A further benefit of doing field research is its awareness raising potential for the students' own thinking about topics related to Brexit, their relationship with other European countries, and key questions of identity and nationality.

#### 4.4 Campaigning and debating

One step further would be to actually involve the students in simulating democratic processes by getting them to run their own campaigns on an issue relevant to them – it could be something to do with their school life or even an issue within the class such as the need for homework – and then vote on the question. The students could be divided into two sides and have to run campaigns and produce campaign materials in a similar way to the Brexit campaign. Interviews could also be roleplayed with campaign leaders. Such an approach would have the advantage of deepening students' understanding and feeling for democratic processes and their strengths and weaknesses.

Classroom debates could also be held using the same rules as the UK Parliament, with students assigned different roles including that of the Speaker. Students could present their own bills and vote on amendments, thus gaining insight into the workings of a Parliament. Many useful videos explaining how the UK Parliament works can be found on the internet (see for example, UK Parliament, 2014). As a follow up they could be asked to find the similarities and differences with how their own Parliament operates and then perhaps they could design an ideal Parliament with different groups taking it in turns to present their ideas.

#### 4.5 Online materials

In addition to all the resources already mentioned, there are many teaching materials freely available online on the topic of Brexit. Just to mention a couple, Busy Teacher is a site full of useful resources designed by teachers for teachers and has a page with some activity ideas for helping ESL students to understand Brexit (Dixon, n.d.). The collection of resources for British schools on the tes (formerly known as the Times Educational Supplement) website (SimplePolitics, 2017) also offers a lot of downloadable useful materials.

All of these activity ideas have the same aim: to raise awareness, allow deeper understanding and promote cross-cultural comparisons and so thus allow the possibility for self-reflection. The purpose of this section has not been to provide readymade lesson plans but just to plant a few 'seeds' or starting points for teachers to be able to devise their own activities for their own learners.

### 5 Conclusion: where do we go from here?

An intercultural approach to teaching English is predicated on the assumption that language and culture are inextricably connected and that to learn a foreign language fully means learning about its cultural contexts also. However, today we live in a globalised system in which English is a world language used much more by non-native speakers than by natives and in a wide variety of cultural contexts which may be constantly shifting and unstable. Given this reality, the value of looking at the Brexit phenomenon in the classroom may well be questioned. Apart from being highly complex in its causes and continuously unfolding effects and involving a difficult and somewhat abstruse political hinterland, its relevance may seem to be limited to a declining and relatively small union of island nations.

On the other hand, in-depth learning about the elements of any culture in the EFL classroom is good preparation for successful intercultural communication with people from other linguistic and cultural backgrounds. In addition, Britain is still widely seen as the original home of the English language and its culture remains a source of interest for many groups of learners around the globe (see for instance the strong interest

in British culture and etiquette in English language courses for Chinese students (British Council, 2017; Thorniley, 2010)). Within the context of the author of this paper, who teaches in a Central European country as a teacher trainer for future teachers who will most likely find themselves working with coursebooks offering a strongly Anglocentric approach to the language, British culture still features largely though by no means exclusively in school classrooms. Moreover, in many parts of the world the unfolding events surrounding the Brexit referendum are an object of fascination and in some regions which may be affected by the fallout, of genuine concern. This is definitely the case in Eastern and Central Europe where a large number of young people are drawn to western European countries in search of better job opportunities and more secure futures. For them Brexit is not just a topic of interest but one which has the potential to directly affect their future lives. Taking my own adopted country as an example, there is a Facebook page created specifically for Hungarians living in London called *Londonfalva* (London village) which refers ironically to the fact that the approximately 30,000 Hungarians living and working in London would form a medium-sized town in Hungary (the Office of National Statistics gives a figure of 57,694 Hungarians officially working in the UK for January to December 2015 (ONS, 2016)). For these mostly young people and for many of the following generation, the changes in British society brought about by the result of the Brexit referendum and the outcome of the negotiations with the EU are a source of concern and anxiety, and this situation is mirrored in the other Central and Eastern European countries who are members of the EU.

Therefore, it seems that for learners in this part of Europe, Brexit and its meaning for British society and culture and the relationship of Britain with the rest of Europe is potentially of great interest. British society is of course a multicultural one including the thousands of EU nationals who are presently living and working in the UK, and many of the students studying English in classrooms in Hungary and its neighbouring countries will know people, friends and relations, who are in the UK or who are planning to go there. Moreover, by studying the Gordian knot that Brexit has created in British society, students can be opened to reflecting on their own society and key issues of identity and belonging that relate to their own cultural contexts. It may even have the potential to stir within students a genuine interest in local issues, which could eventually lead to them finding their own voice and becoming active participants. Active citizenship is an educational aim discussed by many prominent educationalists both past and present. This means that Brexit is a topic that is actually highly suitable to form the basis of engaging language activities in the classroom which explore cultural practices, connections and meanings, and it is hoped that some of the suggestions and ideas laid out in this paper may help form the basis of these sort of activities or at least stimulate creative and productive thinking on how to use Brexit in the classroom.

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# **FEMINIST RECLAIMING OF THE POPULAR: HOW TO CUT ACROSS HEGEMONIC BINARIES IN COMPARATIVE ANALYSIS?**

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## **Abstract**

The present paper is a contribution to feminist research in cultural studies that contests the allegedly incompatible relationship between entertainment and state politics, challenging the unproductive denunciation of the coupling of politics with popular culture. My argument is based on the comparative analysis of two recent examples of the political media's attempts at gate-keeping intended to discredit woman politicians in Hungary and the US, trying to 'put them in their place'. The two cases are the coalition building by the so-called white-capped woman MPs representing all opposition parties in parliament against the 'slave law' in Hungary and the response to the six presidential candidates of the Democrats for the 2020 US elections. I will conceptualize the two allegedly distinct fields of politics and popular culture as intersecting by pointing out a shared logic of spectacular communication at work in both as defined by Guy Debord (2006). In terms of methodology, I will argue that a comparative analysis in search of an overlap both between popular culture and elite politics and between the two societies entails a dialectical, dynamic approach to comparison. A comparative study is inherently multi-directional and cannot fix one of the social fields or societies as 'the' point of departure for the analysis. That fixation would make the selected element function into the 'obvious' measure, inevitably othering the one compared to it. A dynamic, multi-directional approach to comparison can be best accounted for as a relationship of intersectionality enmeshed in diverse global cycles of communication.

## **1 Introduction**

In my paper I want to contest the perceived binary divide between state politics and popular culture and challenge the denunciation of the latter produced by the logic of such a practice of categorization. Instead I will argue for a relative distinction of the two by pointing out that party politics and popular culture share the spectacular logic of communication of commodity culture. An important constituent element of that political communication is the prevailing practice of discrediting woman politicians when they are seen to be potentially successful in their progressive critique of the system both in Hungary and the US. The discrediting is performed by various associations rendered to belong in popular culture since it is regularly seen as a domain of 'femininity'. The exclusionary gender politics will be demonstrated by the right-wing media's hostile response to the 'white-capped women's' demonstration against the so-called 'slave law' introduced in December 2018 in Hungary and to that of Elizabeth Warren's presidential candidacy in the USA. Although the institutional

organizations of gender and gender politics in the two societies are not a simple matter of equivalence, nor do the regulatory practices in the two geographical spaces constitute identical discourses of normalcy, I still believe that a comparative analysis is methodologically valid and can contribute to an understanding of the gate-keeping mechanisms of the media in both spaces in their own distinctive ways. In spite of the differences of the distribution of the meaning-making practices in the two social spaces, the radical multiplicity of the political field of the 2010s may still support the explanatory power of a transformative use of Rosemary Hennessy's (1995) conceptualization of gender and the regulation of its visibility, as discussed in Section 2 below.

## 2 Intersectionality and comparison

Methodologically speaking, my analysis entails a dialectical, dynamic approach to doing a comparative study. It entails above all a comparison that does not fix the analytical point of departure, in this case a priori in the US cultural and political space. That decision would inevitably turn the specificities of the US into 'the' ideal measure, attributing to it a necessarily more advanced, more democratic formation – retroactively 'proving' the a priori values implicated in the researcher's decision. A dynamic approach to comparison rather assumes partial similarities between the two societies and in turn a complexity of the attempts at minimizing the relevance of the emergence of women politicians in elite politics in both countries. What I am interested in is to trace the ideological attempts of the media at rearticulating these women's left-leaning progressive policies as an act of credibility because 'they are caring for the future of their children.' The intersectional approach to social conflicts allows me to reveal that the discreditation is not merely a matter of culture (care in association with mothering) but also a political struggle over participation on an equal footing. This way the very measures of comparison come to be internally diverse and relative to the specificities of the given society, successfully disrupting and exposing the semiotic horizon of 'care' in contemporary (US as well as Hungarian) consumer society in a way where social power in delineating gender difference is no longer the power of domination but "the source of political empowerment and social reconstruction" as argued by Kimberlé Crenshaw (1994, p.93). At the same time, due to the intersection of multiple power relations, the change in the point of departure for comparison will not end up in an absolutist valorization of plurality either, precluding any comparison on the grounds of incomparable local specificities. The comparison will result in the possibility of exposing shared global tendencies traversing the various formations of commodity culture in the two countries and will show that matters of various social conflicts equally tend to be 'dressed up' as matters of presentation and appearance in the eye of the citizenry, while diverting the imaginary spectator's gaze from a more substantial structural critique of the event in question.

My analysis will demonstrate that what the two spaces have in common – in the name of credibility – is the strategic appropriation of femininity as a matter of popular cultural entertainment of fashion or (motherly) care safely contained under the sign of Guy Debord's (1994/2006) concept of the 'spectacle'. According to him, social lives are ruled by commodity relations, even if to different degrees where imaginary "[woman politicians'] life presents itself as an immense [self-evident] accumulation of *spectacles*" (Debord, 2006, p.12). Therefore, it is very difficult to argue for an alternative gender politics that should challenge the normalizing account of commodification. However, through deconstructing the alleged divide between politics and popular culture we may provide a social account of gender identities

that are not to be seen as a matter of individual choice of 'lifestyle' on display but of a historically contingent social position under the conditions of commodity culture to be challenged by addressing structural (institutionalized) ways of living.

The value of an intersectional comparative analysis is therefore twofold. Firstly, it lies in its potential to engage the very concept of difference in a political frame rather than suppressing or amplifying it within normalized hierarchies of consumerist 'style'. Secondly, this engagement does not necessarily result in a wholesale discreditation of identity either. Insofar as our political objective is to "imagine [...] a liberal polity whose price of inclusion [of gender difference] does not demand erasure through assimilation," as Linda Martin Alcoff (2006, p.84) puts it succinctly, we cannot disregard but need to understand the function of identity in the particular power struggles. In commodity culture, where identity comes to be "visibly marked on the body itself, guiding if not determining the way we perceive and judge others and are perceived and judged by them" (Alcoff, 2006, p.5), we cannot simply embrace a post-modernist disregard of identity as an inherently injurious because arbitrary act. Instead, she proposes a move that subverts the binary opposition informing the most recent debate on the usefulness of identity politics. She argues for the need to expose the foundational logic of a self-evidently understood visibility and explore in its stead its situatedness along diverse vectors of power, so being able to acknowledge the role identities play in power struggles.

Following from Alcoff's and Crenshaw's observation, this re/articulation of identity in contemporary commodity culture involves then, I argue, the redefinition of the very meaning of visibility, the act of seeing itself. This consists in shifting the concept from self-evident experiential matter of appearance to materialized embodiment at the intersection of discourses and institutions. Drawing on Rosemary Hennessy's (1995, p.143) argumentation, 'visible' is what is an ideologically desirable cultural object to be routinely 'registered' as self-contained simple matter of display, while 'seeable' entails a critical exposure of the historical conditions of visibility including economic divisions of labor and wealth, political arrangements of state and politics fetishized by the glamour of the spectacle. An intersectional approach to comparison then means that we see the cultural/semiotic practices of meaning-making of 'woman' and the social, material (economic and political) practices of institutional organization of those meanings and activities associated with it in a dialectic relation, where the knowledge claims about what 'woman(hood)' should or could mean in association with the various cultural products are themselves interventions in what we come to know 'about' woman collectives and, reversely, will shape our social/material arrangements of such positions.

In other words, Hennessy (1995) argues that gender distinction is a social institution of categorization and one that is not the only domain that organizes and articulates the meanings of femininity (and masculinity): those meanings are articulated and organized in other domains such as party-political election campaigns and oppositional protests in my data, which events are themselves at the same time implicated as divisions of labor. Nor do femininity/masculinity distinctions only organize and articulate gender, but they may also produce implied meanings through a chain of associations, such as that of the 'political leader' or 'electability'. Making the implied, i.e. directly invisible meanings seeable by deconstructing the explicit, i.e., the apparently self-evident visible meanings of the '(real) woman politician' in the two political arenas and comparing their shared logic of (re)presentation may result in a feminist political subversion. This radical strategy challenges a short-sighted descriptive approach to analysis that ultimately reiterates the dominant ideology and feeds into "commodity's gravitation towards the new, the exotic, the spectacular" (Hennessy, 1995, p.161). In other words, such a political action takes the visibility of commodity logic at face value instead of exposing the structural effects of its production, and allowing for empowerment.

I hope that my understanding of Hennessy's differentiation of immediate display from the implied logic of visibility will support my intersectional approach to a comparative analysis, namely the need to expose the implied structuration of the multiple dimensions of the field of study, in my case that of party politics, that is played out explicitly in an allegedly immediate, visible manner in the field of popular cultural statements of fashion and appeal. The application of Hennessy's approach is twofold. On the one hand, it allows me to establish the nexus of multiple meanings, the dynamic play of said/unsaid statements without which no signifier may come to be intelligible in a given historical moment and cultural space. Secondly, it also opens up some space for a potential shift in the meaning of woman towards radical (identity) politics and away from the dominant lifestyle (identity) spectacle of commodity culture.

Although such a historical materialist intersectional approach to comparison would entail a systematic analysis of the institutional as well as the semiotic conditions of enunciation in contemporary Hungarian and US elite politics, my analysis, for lack of space, will focus predominantly on the semiotic dimension. I will expose the dominant logic of categorization practices informing the diverse meanings of woman(hood) at the intersection of the contemporary hegemonic formation of ruling and appearance through the perspective of 'spectacle'. This is a legitimate objective in so far as identities can be viewed as categories of knowledge that are rendered into meaningful orders of values as effects of dominant logics of institutionalized power, legitimizing what is meaningful and what is not or is less so at the given moment of political struggle for power.

### **3 Exposing the gender bias in discrediting woman politicians**

Liesbet van Zoonen (2004) in developing the concept of cultural citizenship challenges the alleged absolute difference between politics and popular culture by pointing out their shared use of "the intense investments that audiences make in their favorite popular genres and stars" and its bearings "on the possible activity and involvement of people in the political field" (van Zoonen, 2004, p.53). Her approach contests the dominant binary perception of members of fandom enacting an affective appreciation/consumption of cultural objects of entertainment against a critical cognitive and active assessment of events and objects associated with the political activities characteristic of responsible citizens. "Juxtaposing fans and citizens in such commonsensical terms suggests that fandom cannot be a beneficial model for political citizenship; on the contrary, the passive fan and the active citizen are constructed as absolute opposites" (van Zoonen, 2004, p.61). Going beyond this hierarchical distinction of the two social fields prevailing in contemporary political discourse, for instance in the regular charging one's opponents (or enemy) with 'soaping' politics, van Zoonen introduces the concept of 'entertaining citizenship' at the intersection of the popular cultural and political in so far as both are shown to "rest on emotional investments that are intrinsically linked to rationality and lead to 'affective intelligence'" (van Zoonen, 2004, p.53). Although she does not refer to the earlier work by Paolo Carpignano, Robin Andresen, Stanley Aronowitz, and William DiFazio (1993), it is important to mention their discussion of the recent crisis of legitimacy in news media communication. Their major claim is that the response consists in the emergence of the ideology of the phantom public produced by the immediacy and the 'nowness' of the communicative practice of television news (Carpignano et al., 1993, p.103), resulting in the effect of an 'unmediated', direct relationship with reality between the events and the journalists and, in turn, between the media and the viewer. Carpignano et al. also point out that the divide serves to mitigate or play down the relevance of two major changes in news reporting, both making use of the structural specificity of the soap opera narrative where "The news

room becomes the location of happening and the reporting of the events becomes the plot of the situation (the difference between 'Murphy Brown' and 'Eyewitness News' might be only in the intensity of laughter)" (Carpignano et al., 1993, p.105). Carpignano et al. read this attempt at "counteracting the crisis of legitimacy of the news" by various structural tools of 'proximity', epitomized by the construction of the figure of the 'star investigative reporter' as unequivocally negative. Their perception of news (production) is set up against and over 'entertainment', such as 'soap operas', as the realm of the imaginary. I think it is an inevitable move since Carpignano et al. ignore the fact that the binary distinction is at the same time reinforced by the association of entertainment (and affect) with 'femininity' and the 'rationality' of the former with 'masculinity'. Note, nevertheless, the collocation of stardom and investigation, which resembles that of van Zoonen's 'entertaining citizenship', opening up to a less judgmental and potentially more subversive reading of the changes. Making explicit the importance of the gendered and gendering dimension of this reconfiguration of the public/private binary where what is at stake is the legitimacy of the 'news' embodied in the 'investigative' relationship of the journalist over (and at the expense of) the tabloid media worker. What is more, in so far as the media is the fourth estate of power, the concern over the media falling prey to popular culture is also present in the domain of governance, the other estate of power, whose practices of 'soaping' are the immediate focus of van Zoonen's analysis. She is giving an account of the ways in which the location of woman politicians at the intersection of public policy-making and gender makes their actual experience of discreditation qualitatively different from that of man politicians. To advance the telling of that location she draws on an intersectional approach to the structural intersection of the public domain of elite politics. The selective choice of certain popular cultural technologies of communication is explained as being governed by commodity culture's orientation towards appearance, but in such a way that it should secure the 'credibility' of the man politician, leaving his entitlement to the embodiment of the figure of the 'leader' unquestioned, functioning as the ideological limit to the appropriation of the popular by the political.

Celia Lury's (1996) reading of late modern commodity culture explains this ever-growing dominance of the spectacle. Her major point is that since the late 1970s there have emerged multiple and relatively independent cycles and sites for the production and consumption of things, each with their relatively distinct regimes of value. This is another way of saying that the importance of the market for the circulation of things produced or appropriated for exchange has immensely expanded. The relative independence of production and consumption resulted in growing (buying) power and authority being granted to certain groups of consumers, resulting in "[t]he special importance given to the consumption or use of cultural objects or goods in contemporary societies by specific social groups or cultural intermediaries" (Lury, 1996, p.4). I would argue that the greater the gap between the cycles of production and consumption, that is the greater the divide between the exploitative and 'ugly' nature of capitalist production and the appealing packaging and promotion of the commodities, the more likely it is for the commodities to be able to be decontextualized and reoriented towards 'luminosity' or 'looking good', which is captured by Debord's concept of the 'spectacle'. What is interesting to trace, then, are the ways in which this 'looking good', and with it the dominance of the art-culture field, crosscuts with gender relations. Why is this orientation to appearance and design (symbolic value) not seen as 'feminine' when it is associated with man politicians and their programs? Why does the use of emotionally charged images, when associated with female embodiments, work in more demanding ways to disarticulate their political messages from the spectacle and present themselves as 'authentic' politicians of substance and trust in the eye of the citizenry? These are the

ultimate questions guiding my analysis of the chosen press materials to see how this explicitly unacknowledged, yet indispensable work of gender plays out and emerges at moments when woman politicians appropriate the center stage in large numbers both in Hungary and the US.

I have chosen two similar moments from recent party-political struggles in the two countries. Both have to do with the potential power of women politicians when caught performing a kind of solidarity across their differences, hoping to make themselves visible on their own terms and have their voice heard. The Hungarian event is the protest against the so-called “slave law” which was passed by the governing FIDESZ (Young Democrats’ Association) majority in Parliament on December 12, 2018. The law entails several amendments to the Hungarian labor code: it raises the cap on overtime from 250 to 400 hours a year, and gives employers up to three years instead of one to pay for the work.<sup>1</sup> The US event is the unprecedented number of six woman candidates running in the 2020 pre-elections in the Democratic Party. The potential point of similarity between the two cases is captured by the question: what happens when ‘gender’ cannot be taken as an obviously given category of female sameness with a single token woman at play. The exceptionally high number of six candidates in the US and the thirteen MPs in Hungary coming from various opposition party factions inside and outside of Parliament successfully building a block around the particular issue calls for the recognition of internal differentiation within women; the actual political situation calls for an intersectional approach.

The Hungarian opposition has been extensively criticized for its inability to form a coalition against the FIDESZ-KDNP (Young Democrats’ Association - Christian Democratic Party) coalition in the last elections in April 2018, allowing FIDESZ to form a two-thirds majority government for the third time in succession instead of a simple majority. They have been accused of letting down the majority of the citizenry (52%), who voted for the opposition but whose votes were lost within the framework of the new electoral law passed in 2012, whose logic can be defied if and only if there is only one candidate of the opposition running against the one in power<sup>2</sup> (Bíró-Nagy, 2018). Against this history of division and rivalry, it was an unprecedentedly promising moment when the opposition parties, both the right and left wing factions, for the first time, eventually united against the ‘slave law’ on the day of the vote in Parliament, trying to obstruct the vote and then organizing a demonstration the next day. The protest march was to make the newly forged union visible for the public. Therefore, it is important to highlight that it was decided that this union should be symbolized by thirteen women, representing the different parties in opposition, literally leading the march – wearing white caps and shawls. The dress code was intended to be symbolic, to invite the citizens to see them as leaders of a ‘peaceful’, non-violent demonstration. Yet, very quickly, it was associated with the color of the suffragette’s movement as well.

Regarding the reception of the event, I analyze three quotes. The first one is by the ex-Prime Minister in the first center-right government after the system change in 1989, Péter Boross. He was interviewed about his opinion of the current political situation in the first issue of *Magyar Nemzet* (Hungarian Nation), the right-wing broadsheet in February 2019, when it was relaunched under new ownership after the parliamentary elections in 2018. He took the symbolic opportunity of the ‘restart’ to express the following reflections on the opposition in February 2019. Considering his position in elite politics, his opinion was taken to stand for the establishment’s view:

<sup>1</sup> The full text of the bill in Hungarian is available at <https://www.parlament.hu/irom41/03628/03628.pdf>.

<sup>2</sup> For information on the processing of the people’s vote into actual number of representatives, see the entry on the voting system after 2012 at [https://en.wikipedia.org/wiki/Elections\\_in\\_Hungary](https://en.wikipedia.org/wiki/Elections_in_Hungary).

With Western money, they want to tear down even the traditional gender roles. For instance, no matter how degenerated the political fights have been, or how shallow the discourse, these gross things were at least not linked with women. The casting of such vulgar roles involved men, who did meet the requirements of roughness. Now, however, women politicians take the lead in primitivity, in low class performances. That's what we could see in the scandal in the parliament or in the affray outside the headquarters of MTVA ('Hungarian Broadcasting Corporation').<sup>3</sup> (Megyeri, 2019)

In response to Mr. Boross's interview, eight MPs, all men, representing all parties in opposition in Parliament, issued a Letter of Protest in support of their woman colleagues under the title "It is Péter Boross who is a disgrace" on the same day. It was an important gesture to reinforce the new coalition-building of the opposition, yet in terms of gender relations, their logic is contradictory. On the one hand, they (rightly) criticize the ex-prime minister for his silence when MPs are accused of physical violence against their wives or for his idea of imposing a tax on single women and for contending that the most appropriate place for women is the maternity ward:

Péter Boross has no words to protest when a politician from the government faction breaks his wife's nose and jaw, but calls woman politicians primitive when they stand up for the voters with reason. Péter Boross himself has taken the lead in arguing that a new tax on single women should be imposed and the only place where a woman cannot be replaced is the maternity ward.<sup>4</sup> (Boross Péter maga a gyalázat, 2019 Feb 6)

Nevertheless, in the Letter of Protest the eight signatories see the woman MPs fight for gender specific 'issues' as if there were a gendered division of labor in the representation of the constituency:

The woman MPs in the opposition have stood up for the elimination of violence against women and children, the ratification of the Istanbul Convention [Action against Violence against Women and Domestic Violence, 2011], and for the implementation of the Lanzarote Convention in Hungary [Council of Europe Convention on the Protection of Children against Sexual Exploitation and Sexual Abuse, 2007].<sup>5</sup> (Boross Péter maga a gyalázat, 2019 Feb 6)

The binary divide of sexual difference is further underscored in the closing statement - with an appeal to the 'real man', by implication of the signatories of the protest, who should feel ashamed if anyone speaks about women in the voice of

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<sup>3</sup> All translations of the Hungarian print media texts are provided by the Author. In the Hungarian original: "Nyugati pénzzel a háttérből le akarják bontani még a hagyományos társadalmi szerepeket is. Például eddig bármilyen elfajultak is voltak a politikai csatározások, sekélyes a beszédmód, de mégsem a nőkhöz kötődtek ezek az ordenáriságok. A férfiakra osztották az alantasabb szerepeket, akik meg is feleltek ezeknek a durvasági elvárásoknak. Most ellenben a női politikusok viszik a prímet a primitívségben, a színvonal alatti akciók terén. Ezt láthattuk az országközi botrányokozás vagy az MTVA-székházban való garázdálkodás alkalmával is."

<sup>4</sup> In the Hungarian original: "Boross Péternek egyetlen szava sincs, amikor egy kormánypárti politikus eltöri felesége orr- és járomcsontját, de primitívnek nevezi a női képviselőket, ha jogosan kiállnak a választókért. Boross Péter személyesen is élen járt afféle kijelentések megfogalmazásában, mint hogy szingli adót kellene bevezetni, vagy hogy a nő egy helyen nem helyettesíthető: a szülőszobában."

<sup>5</sup> In the Hungarian original: "Az ellenzék női képviselői kiálltak a nők és a gyermekek elleni erőszak visszaszorításáért, az Isztambuli Egyezmény ratifikációjáért, és azért, hogy a Lanzarote-i Egyezményt végrehajtsa Magyarország."

'disrespect'. This traditional perception of a man / woman relationship as 'respectful' simply cannot be undermined by the very intention of standing up for equality between women and men MPs:

Hungarian society needs strong women in the opposition as well. A real man never speaks like that about women. After an interview like this, everyone has good reason to feel ashamed on behalf of the ex-prime minister.<sup>6</sup> (Boross Péter maga a gyalázat, 2019 Feb 6)

At the same time, the most vocal critical voices from the site of grassroots activism, self-identifying as ardent opponents of the populist political system, reflected on the event from the most misogynist perspective, degrading the event for its marketing:

The white cap and the white shawl were so effective that no one else was wearing them; only politicians. The Western press was enthusiastically celebrating the heroes and symbols of the 'resistance' against Viktor Orbán's macho authoritarian power: the woman MPs wearing white caps and shawls. A priority role was given to symbols to which people could march: in addition to the eternal symbol, the Parliament, the headquarters of MTVA, the empty space of the Imre Nagy Statue, and the Presidential Residence in the Sandor Palace and Orbán Victor's luxury office in the convent of the Carmelites [in the Castle District].

We have no option left but to dismiss and pension off those responsible for the two-thirds majority [in parliament], the privileged over the past thirty years; to change the elite: to set up a new party system.<sup>7</sup> (Puzsér, 2019).

My key point is that the fairly widespread sarcastic tone exemplified in the quote above is mediated by misogyny. The profound disappointment with politics since the system change in general, and with the opposition in particular, is criticized not as a matter of institutional organization of power but as one of the generational incapacity of particular individuals, which is captured by the image of the opposition woman MPs, ironically, at a moment when they are at long last providing a good example for their male colleagues in the opposition to follow: uniting their forces over individual contentious party political gains. The sarcastic voice of overgeneralization, using women's faces to stand in for the political structure, is particularly unfair in a country that has the lowest share of woman politicians in the European Union.<sup>8</sup> What is more, the scapegoating of women is legitimized by accusing them of turning politics into a 'stupid fashion statement' instead of, presumably, dealing with 'real problems of substance'. Although marketization is integral to structuring global capitalist production, one major institution of it is the fashion industry. The demands of the profit

<sup>6</sup> In the Hungarian original: "A magyar társadalomnak szüksége van erős nőkre az ellenzék sorain belül is. Egy igazi férfi soha nem beszél így a nőkről. Egy ilyen interjú után jó oka van mindenkinek arra, hogy a volt miniszterelnök helyett is elszégyellje magát."

<sup>7</sup> In the Hungarian original: "A fehér sapka és a fehér sál annyira jól működött, hogy politikusokon kívül más nem is viselte. A nyugati sajtó lelkesen ünnepelte az Orbán Viktor macsó tekintélyuralmával szemben kibontakozó „ellenállás” hőseit és jelképeit: a fehér sapkás, fehér sálás képviselőnőket. Kitüntetett szerepet kaptak azok a jelképek, amelyekhez vonulni lehetett: az örökös szimbólum, a Parlament mellett az MTVA székháza, Nagy Imre szobrának hült helye, a köztársasági elnök hivatala a Sándor-palotában és Orbán Viktor luxus-dolgozószobája a Karmelita kolostorban. Nincs más, mint a kétharmad felelőseinek, az elmúlt harminc év haszonélvezőinek a nyugdíjazása, nincs más, mint az elitcsere: egy új pártstruktúra felállítása."

<sup>8</sup> For the exact figures see the appropriate European Union document on women in politics in the EU: <http://www.europarl.europa.eu/RegData/etudes>.

through ‘fashion’ not only targets particular groups of the population but “facilitates the building up of multiple social groups who define themselves through the assertion of a specific style” where the multiple goods externalize diverse personalities (Lury, 1996, p.48). However, as an effect of the sexist ideological perception of marketization, men emerge as the chief bearers of ‘production’ as if beyond and above the logic of ‘consumption’, which is made to look frivolous and as such dangerous only for women, who allegedly cannot resist its temptation. It is the ideological implication of gender distinction that saves the exploitative classist logic of the capital in place as well as the relatively autonomous space of state politics serving that interest at the expense of womanhood. In short, the politicians wearing the white hat and shawl, once exposed to the scrutiny of the male journalist, are revealed and represented not as self-possessed autonomous decision makers but as individuals possessed by commodity aesthetics – consumed, of course, by the gaze of men.

#### 4. Gendering likeability

The stakes for women politicians in the US are similar: to be recognized as autonomous active agents; yet their struggles are played out in a relatively different political space. The ultimate test of their success is the presidential election. In the history of presidential campaigns, there have been altogether five women candidates, and each time only one woman competing with dozens of male candidates in the pre-elections. The 2020 competition is an historic break with that tradition. The six women candidates running in the presidential pre-elections are all Democrats. Their record is coupled with an equally unprecedentedly large number of women, 102 altogether, elected to the House of Representatives in 2018, of whom 35 are newly elected, according to the Pew Research Center (Desilver, 2018).

Breaking with the tendency which lasted until the early 1990s, the record number of women serving in the new Congress and the six women on the presidential-debate stages is a major visible change in comparison with the 2008 and 2016 elections, when Hillary Clinton was the only woman against a dozen male candidates running in the Democratic Primaries. The current media presentation therefore calls for a comparison with the reception of Hillary Clinton’s first presidential campaign in the 2008 elections. Clinton’s reception in the press back then can be read as an indirect act of homophobia that was part of a backlash against queer and feminist politics, within the hostile frames of an intelligibility that positions woman and political leadership as a highly contentious collocation. In my comparative study of that reception, I argued that it was a backlash against feminism overtly played out around the looks of Hillary Clinton, who was singled out for her ‘obsession with the pantsuit’. It was read as her conservative ‘failure’ to accomplish the ‘post-feminist’ balance between looking properly feminine, i.e., ‘sexy enough’ without overdoing the masculine (Barát, 2011). The research question I am pursuing now is concerned therefore with whether the exceptionally high number of women and their ethnic diversity in the Democratic Primary may make a difference to the earlier gender politics of 2008, whether they can subvert the gendered politics of professionalism optimized in the concern about ‘dressing for success’ in Hillary Clinton’s case. If so, in what other ways does gender bias play a role in the voters’ perception and is that bias still mediated by popular culture?

At the time of writing this analysis the strongest candidate of the six is Senator Elizabeth Warren. She officially announced her participation in February 2019 in Lawrence, Massachusetts. It is a symbolic location to choose in that a group of women started a strike at Everett Mill there in 1912: “The senator drew on the strike as a story of women, many of them immigrants, taking on a stacked system and triumphing by gaining raises, overtime and other benefits” (Taylor, 2019). That history resonates

with Senator Warren's political vision and indirectly underscores the credibility of her class-oriented economic agenda: "It won't be enough to just undo the terrible acts of this administration," Ms. Warren said. "We can't afford to just tinker around the edges — a tax credit here, a regulation there. Our fight is for big, structural change. (ibid.). Meanwhile her male opponents, observes the journalist, such as "Buttigieg and O'Rourke — two men with relatively thin résumés running for president — have been piecing together their platforms as they run" (ibid.). How does this general concern for woman candidates' electability, i.e. their ability to beat Donald Trump in presidential office and planning to rerun for the Republicans, intersect with concerns mediated by popular culture? It is not that women are not considered qualified for the office at all; it is more like a scalar devaluation in that they are seen as 'less' qualified than men. In general, there seem to be strong doubts about the woman candidates' capacity as president in the 2020 elections. When it comes to gaining voters' trust, woman politicians have much more to overcome than men (Solnit, 2019).

Furthermore, this lesser degree of 'electability' is seen to be justified by being prone to be possessed by their 'emotions'. For instance, in a Suffolk University poll in April 2019, nearly 10 percent said that if the Democratic primary elections were held today their primary reason for not choosing Senator Warren is because "She seems angry."<sup>9</sup> What is important to recall from social psychological research in this regard is that gender bias emerges in evaluative judgments of women in institutions that are distinctly seen as 'male' in character even if the actual women in that domain have successfully demonstrated their capacity, like Senator Warren in the Democratic Primary now. In those institutions, men, when angry, are not perceived as 'out of control' but as people who stand up and fight for their principles (Heilman et al., 2004). However, there is one important point that seems to escape journalists' attention even in mainstream US broadsheet papers when they are drawing on the various opinion polls. They seem simply to take over the results without reflecting on the design of the surveys that result in finding gendered bias in the data. For instance, it would be important to note that the opinion "She seems angry" in the Suffolk University questionnaire is not provided by respondents to an open ended question but by the researchers — probably to test their expectations — but it is even more telling to see that it occurs in the company of the option "She does not excite me" with nearly 11 percent in agreement with it. I think it is reasonable to assume that the meaning of 'exciting' next to the affect of anger easily comes to be associated with emotions, reiterating and naturalizing the biased gendering binary of 'if female then emotional' — and therefore less likely to act as a reliable leader of reason — versus 'if male then rational' — and therefore a self-possessed agent deserving trust. The opinion polls unfortunately do nothing but work hard at associating the woman candidates with the language of negative judgment instead of posing their question from a perspective that could cast doubt on the male candidates' performance as if beyond question. In my reading, this is the result of the unidirectional static performance of comparison, producing masculinity as if proven by 'facts' of research. This masculinized entitlement to — or monopoly of — 'objectivity' then serves to warrant seeing rational decision as the exact other of — 'affect' and the very essence of presidential duty — now made 'masculine' without any need to explicitly say so. At the same time, this binary divide will evoke the allegedly pure affection orientation of entertainment to the point where if a woman candidate's performance is smart, and she comes across as knowing the facts, she is seen as smug and all-knowing. (Solnit, 2019)

A telling and upsetting comparison in this regard may be the media perception of Joe Biden's performance in the same race. When preparing for his presidential announcement, Biden's team in a preemptive move disclosed the phone call (only

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<sup>9</sup> For the study visit [https://www.suffolk.edu/-/media/suffolk/documents/academics/research-at-suffolk/suprc/polls/new-hampshire/2019/4\\_30\\_2019\\_marginals\\_pdf](https://www.suffolk.edu/-/media/suffolk/documents/academics/research-at-suffolk/suprc/polls/new-hampshire/2019/4_30_2019_marginals_pdf).

after 28 years!) that he had made to Anita Hill apparently to 'apologize' for his conduct when in 1991, as the chairman of the Senate Judiciary Committee, in the confirmation hearings regarding Hill's accusation of Clarence Thomas, President George Bush's nominee to the Supreme Court, of sexual harassment, he did not support her. Anita Hill in an interview about this phone call said "she cannot support Mr. Biden for president until he takes full responsibility for his conduct, including his failure to call as corroborating witnesses other women who were willing to testify before the Judiciary Committee. By leaving them out," he said, "he created a 'he said, she said' situation that did not have to exist." (Stolberg & Hulse, 2019). What is upsetting to observe is the successful maintenance of the gender politics which prevailed in the hearings back in 1991. Despite the current success of the #MeToo Campaign, Hill's judgment that Biden failed to apologize has not put him second, behind Senator Warren in the Democratic race, but left her with the extra task of 'proving herself'.

My point is not that man candidates are not measured regarding their 'likeability' to the voters. However, power is not distributed equally. Likeability is read as 'attraction' and defined as superficial appeal of commodity culture when linked with women, while men's 'electability' escapes the logic of the spectacle and is evaluated as 'charisma' of innate substance, which in fact boils down to power and entitlement. I think it would be a major step forward in the US if the press that self-identifies as reliable and non-biased stopped focusing their discussion of the Primary in terms of 'electability', whose mere mention at the moment automatically discredits woman candidates. Instead, they should change the perspective of comparison to women's advantage and stop confining them to 'failure' with a focus on what they stand for, if you wish, for the masculinized issues of substance – after all, their policies are much better worked out precisely because of the gender bias that requires them to outperform the men in the competition.<sup>10</sup>

## 5 Conclusion

I have studied the similarities and differences in the ways gender bias shapes women's place in elite politics in the woman MPs' attempts at building an alliance across the different opposition factions in the Hungarian Parliament and in the 2020 Democratic Primary in the US. The media perceptions of politicians' activities in the two political arenas share an exclusionary gender politics that results in an inevitable discreditation of women with reference to the measure of 'authenticity' since it is indirectly structured by an ideologically invested distinction of gender. The relative difference between the two spaces can be pointed out in the visibility of the legitimization of this devaluation in popular culture. In the Hungarian case, not only are the standards much higher for women than for men – as is also the case in the US Primary –, but the value judgments are explicitly hostile and derogatory. The concern about the 'electability' of a woman politician in the US is covertly implicated in the concern about 'what makes a presidential candidate likeable'; this orientation to 'affection' triggers a chain of equivalences about a bodily, non-intellectual existence only when intersecting with female embodiments; in this sense sexism is mobilized only indirectly in the mainstream US press about the six candidates. The understanding of woman as 'spectacular image' in Hungary is drawn on explicitly and in its extreme even with pride when women MPs are shamelessly ridiculed for daring to claim entitlement to the arena of decision making of political leadership.

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<sup>10</sup> I mean something like Astead Herndon & Matt Flegenheimer's opinion piece in The New York Times on April 21, 2019, which articulates the question of candidacy from a perspective that prioritizes women over the white men candidates: "Should a white man be the face of Dems in 2020?" (<https://www.realclearpolitics.com>).

They are literally reduced to soaping politics into a catwalk of fashion statements – a direct move that is fortunately missing from the US quality media discourse, but is replaced by a systemic practice of confining women to failure even when trying to criticize the unequal gender power in favor of the man candidates.

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## PART II

### EMPIRICAL RESEARCH ON INTERCULTURAL COMMUNICATION AND THE DEVELOPMENT OF INTERCULTURAL COMPETENCE



# **COOPERATIVE LEARNING FOR INTERCULTURAL COMPETENCE: A PILOT STUDY ON TEACHERS' VIEWS AND CLASSROOM PRACTICE**

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## **Abstract**

The present study compares the expected learning outcomes of the increasingly popular teaching-learning method called cooperative learning and the components of intercultural competence in order to see whether the former is conducive to the development of the latter. A review of the theoretical background is followed by the analysis of the results of a small-scale survey conducted among teacher participants of professional development workshops. The survey sheds light on the fact that although the principles and expected learning outcomes of cooperative learning are considered essential at school, the majority of the participating public school teachers still rarely use cooperative structures and tend to be unaware of any link between cooperative learning and the competences it develops.

## **1 Introduction**

Although many attempts at promoting change in education have been made all over the world in the past decades, there have been relatively few empirical research projects exploring what language teachers' attitudes are to change and how they respond to 21<sup>st</sup> century expectations in the classroom. The aims of the present study are, on the one hand, to review the literature on intercultural competence (ICC) and cooperative learning (CL) in language teaching and teacher education in order to explore potential links that might connect them and, on the other hand, to present the findings of a small-scale empirical study that investigated teachers' views on and practice of using cooperative structures in their classes in order to develop competences that they find important.

Intercultural competence, as defined in Section 2.1.1 below, has long occupied a prominent place among the expected learning outcomes of language (teacher) education in both European and Hungarian policy documents (for more details see Section 2.2). At the same time, numerous empirical studies (such as, Byram & Risager, 1999; Sercu, 2001; Lázár, 2007 to be reviewed in Section 2.3), find that many teachers still tend to neglect the development of the attitudes, skills and knowledge that will help learners communicate successfully in intercultural encounters. Along the same lines, using cooperative learning structures (as defined in Section 2.1.2) has become an increasingly popular teaching method especially in theoretical reform pedagogy publications on education (Kagan, 1992; Johnson & Johnson, 1999; Aronson, 2001). Yet, the results of the small-scale study to be presented here (Section 4) seem to suggest that teachers rarely experiment with cooperative learning in their classes even if they consider the competences that it develops essential. The questions therefore arise:

What makes teachers change their beliefs about the aims and methods of language teaching, and what influences their classroom practice? The latter question will only be explored briefly and tentatively in this article.

## 2 Theoretical background

### 2.1 Definitions of key terms

#### 2.1.1 Culture and intercultural competence

Many scholars have tried to define culture and intercultural competence and their definitions are usually shaped by the scholars' educational context and influenced by the field of study they work in. A recent publication entitled *Global Perspectives on Intercultural Communication* (Croucher, 2017) gives a comprehensive overview of what intercultural communication means on different continents and for people with different religious, theoretical, political, economic or methodological orientations. This study cannot provide a full review of the latest works on intercultural competence due to space limitations; however, definitions of how the most important terms are understood and used in the present study are in order. Clarifications of the terminology will later be supplemented by the description of a recently published compositional model of intercultural competence in order to make its components more easily comparable to the expected learning outcomes of cooperative learning in Section 4.

In a Council of Europe publication, Barrett, Byram, Lázár, Mompoin-Gaillard and Philippou (2014) attempt to define culture by dividing it into material culture such as tools, goods, foods or clothing; social culture consisting of language, religion, laws, rules of social conduct and folklore; and subjective culture including "beliefs, norms, collective memories, attitudes, values, discourses and practices which group members commonly use as a frame of reference for thinking about, making sense of and relating to the world" (Barrett et al., 2014, pp.13-14). In addition, and in contrast to earlier descriptions of (national) cultures, many professionals now seem to agree that "cultural identity includes our social identities based on cultural group memberships" (Croucher, 2017) and that "cultural groups are always internally heterogeneous groups that embrace a range of diverse practices and norms that are often contested, change over time and are enacted by individuals in personalised ways" (Barrett et al., 2014, p.13). This also entails that "... all cultures are dynamic and constantly change over time as a result of political, economic and historical events and developments, and as a result of interactions with and influences from other cultures and [...] their members' internal contestation of the meanings, norms, values and practices of the group" (Barrett et al., 2014, p.15).

Intercultural communicative competence has been seen by many language teaching professionals as an extension of communicative competence: "Intercultural competence is to a large extent the ability to cope with one's own cultural background in interaction with others" (Beneke, 2000, p.109). According to Byram's (1997) influential model, intercultural communicative competence requires certain attitudes, knowledge and skills in addition to linguistic, sociolinguistic and discourse competence. The attitudes include curiosity and openness as well as readiness to see other cultures and the speaker's own without being judgmental. The required knowledge is "of social groups and their products and practices in one's own and in one's interlocutor's country, and of the general processes of societal and individual interaction" (p.51). Finally, the skills in Byram's model include skills of interpreting and relating, discovery and interaction as well as critical cultural awareness/political education.

Native-like competence as an aim of language learning has been re-evaluated and replaced by communicative competence, and subsequently by intercultural communicative competence by many professionals (e.g., Damen, 1987; Byram, 1997;

Kramsch, 1998; Corbett, 2003, Lange & Paige, 2003). Explicitly rejecting the native speaker model and a sole focus on teaching the target language Civilization for developing intercultural competence in foreign language teaching, Byram and Flemming (1998) claim that someone who has intercultural competence “has knowledge of one, or, preferably, more cultures and social identities and has the capacity to discover and relate to new people from other contexts for which they have not been prepared directly” (p.9). At around the same time in the United States, Fantini (2000) describes five constructs that should be developed for successful intercultural communication: awareness, attitudes, skills, knowledge and language proficiency. Furthermore, he also cites the following commonly used attributes to describe the intercultural speaker: respect, empathy, flexibility, patience, interest, curiosity, openness, motivation, a sense of humor, tolerance for ambiguity, and a willingness to suspend judgment (p.28). Having reviewed recent publications on intercultural competence from around the world, Woodin (2018) highlights a shift of emphasis “from a focus on *cultures* to *culture*”, and based on several other authors even goes further to claim that the focus should be on the *inter*, or, in other words, on interaction itself (p.3). She raises questions relating to the ownership of language and claims that language learning should not only be considered from cognitive and social perspectives but also from personal ones (Woodin, 2018, p.4). In addition, Woodin emphasizes that “non-Western conceptualizations of intercultural competence also place emphasis on the social, historical and political contexts in which intercultural competence is considered as well as raising questions of (in)equality” (p.27).

Intercultural (communicative or communication) competence is generally defined as “the appropriate and effective management of interaction between people who, to some degree or another, represent different or divergent affective, cognitive and behavioral orientations to the world” (Spitzberg & Changnon, 2009, p.7), similarly to many earlier definitions by Byram (1997), Moran (2001), Corbett (2003), Bennett and Bennett (2004) and Samovar et al. (2010) among others.

According to the Council of Europe publication where the compositional model of intercultural competence is taken from for the purposes of this study, intercultural competence is

a combination of attitudes, knowledge, understanding and skills applied through action which enables one, either singly or together with others, to:

- understand and respect people who are perceived to have different cultural affiliations from oneself;
- respond appropriately, effectively and respectfully when interacting and communicating with such people;
- establish positive and constructive relationships with such people;
- understand oneself and one’s own multiple cultural affiliations through encounters with cultural ‘difference’. (Barrett et al., 2014, pp.16-17)

An abbreviated version of the components (the necessary attitudes, skills, knowledge and understanding) of ICC listed in the same study (Barrett et al., 2014) can be seen in Table 1 in Section 4.

## 2.1.2 Cooperative learning

The most prominent authors who first defined and described cooperative learning seemed to agree that a teaching activity can be called cooperative when it corresponds to at least four basic principles (Kagan, 1992; Johnson & Johnson, 1999; Aronson, 2001). The first of these principles is equal participation, meaning that every participant in the activity has equal opportunities for access to materials and for active participation. In every small group each participant should be granted a certain amount of time to contribute to the discussion. Sometimes this can be achieved with

the help of role cards and a specific task for each role. This way introverted students will not be marginalized by more confident speakers in the class, who otherwise tend to dominate discussions. Aronson (2001) goes as far as to blame the traditionally very competitive school atmosphere created by teachers' traditional frontal teaching for tension, bullying, and widespread physical and verbal aggression in schools.

The second principle is simultaneous or parallel interaction. In a cooperative learning environment there are many more interactions between students than in traditional frontal teaching because there are micro-groups of 2 to 4 persons working on their tasks, and everyone is involved and active throughout most of the lesson. Working in pairs or in small groups with specific tasks and roles for each participant is a structural guarantee that every person will be involved even when they do not necessarily want to be involved (Kagan, 1992).

The third principle is positive and encouraging interdependence, which means that the group members can only complete the given activity through cooperation because everyone's results depend on the work of their group members. Teachers can encourage learners to cooperate by structuring the activity so that they can only accomplish the set goals by working together and building on each other's contributions. A typical CL activity that builds on positive and encouraging interdependence is an information gap activity organized as an 'expert jigsaw' as described by Aronson (2001).

The fourth principle is individual accountability (Kagan, 1992), also called personal responsibility. For example, in jigsaw every group member will be responsible for one section of the material and will need to teach this section to the others. It will soon become clear that if they are not ready to teach it, their group mates will not be able to learn it and accomplish the task.

In Hungary, Arató and Varga (2008) published a resource book for teachers on cooperative learning with many practical examples of what can be done in the classroom to develop social competences. In the past 10 years pedagogy departments and methodology courses have often included CL in their textbooks and course materials in initial teacher education programs and in-service professional development events. In a comprehensive chapter on cooperative learning, Arató (2015) describes the advantages of CL and claims that

teachers who focus on the structures of the learning process are likely to improve effectiveness, efficiency and equity in their everyday teaching and learning practice, [and] in a cooperatively structured learning process there is significantly more chance for every single learner to access common academic knowledge and the benefits of schooling. (2015, p.23)

He adds that the expressions of interest and shared responsibility within groups can result in conflicts but that these "conflicts are an important part of the learning process because they help explore the different dimensions of personal (self-esteem, motivation, mindfulness, reliability, etc.), social (empathy, tolerance, acceptance, patience, etc.) and cognitive (higher-level thinking, meta-cognitive skills, etc.) competences" (Arató, 2015, p.28).

## **2.2 Expectations from language teaching and teacher education in policy documents**

In a report to the European Commission's Directorate General for Education and Culture, the authors attempt to identify examples of good practice in language teacher education in Europe (Kelly et al., 2002). The criteria they used to define good practice were based on evidence that the practices concerned appear to be leading to improvements in language teacher training. Three out of the nine most important criteria they applied explicitly refer to the role of culture and intercultural communication in the training

of language teachers (pp.8-9). The authors of the report claim that emphasis on the European and intercultural dimensions of language teacher education takes many different forms and can be located, for example, in explicit course aims in institutional mission statements, curricula including courses on European and intercultural issues, participation in EU programs and student mobility schemes.

Language education policy has been influenced by the intercultural dimension in Europe since the 1980s. This is evident in the *White Paper on Education and Training – Teaching and Learning: Towards the Learning Society*, i.e., the basic document describing language teaching in the EU (European Commission, 1995). According to this document, aside from the obvious economic opportunities that language proficiency allows, other roles of language education include teaching and exploring a sense of belonging and identity and providing the key to knowing other people. Proficiency in languages helps to build up the feeling of being European with all its cultural wealth and diversity and of understanding between the citizens of Europe. Multilingualism is part and parcel of both European citizenship and the learning society (European Commission, as cited in Byram, 2003, p.7). As a result of a number of similar statements in various national curricula emphasizing the need to teach language and culture together, the guidelines provided by the educational policy of the Council of Europe in the *Common European Framework of Reference (CEFR)* have been stressing that there is an urgent need for educational reforms to incorporate cultural and linguistic diversity as well as education for democratic citizenship in the curriculum all over Europe (Council of Europe, 2001). It is also stated that one of the aims of language teaching should be to ensure that all sections of the population should “achieve a wider and deeper understanding of the way of life and forms of thought of other peoples and of their cultural heritage” (Council of Europe, 2001, Chapter 1.2, p.3). The *Common European Framework of Reference* gives a detailed description of the competences that language learners have to acquire in foreign languages during their school years (Council of Europe, 2001).

A reference study written for the Language Policy Division of the Council of Europe (Willems, 2002) claims that if learners are to be involved in understanding other cultures in order to successfully communicate with people, then teachers need a training that does not only prepare them to focus on structures, lexis, functions and a few facts about the target language country, but also helps them teach their learners to deal with the complexities of intercultural communication (pp.7-10). Willems' study presents how the intercultural dimension of language teaching can be incorporated into language teacher education programs through examples of topic areas to be included and methods to be used with trainees who have the opportunity to spend a period of residence in a country where the language is spoken. The author also has suggestions for teacher educators in countries where residence abroad is not available for trainees for economic, geographical or political reasons.

More recent policy documents and reference books often emphasize the intercultural dimension of teaching within or together with global competence development. For example, UNESCO published a reference book on *Intercultural Competence* (2013) and an educational framework entitled *Global Citizenship Education* (2014). The aim of the latter is to help “learners to engage and assume active roles, both locally and globally, to face and resolve global challenges and ultimately to become proactive contributors to a more just, peaceful, tolerant, inclusive, secure and sustainable world” (p.15). Global citizenship education is guided by the aim to develop in learners the competences they need to respond to the challenges of the 21st century (UNESCO, 2014). The United Nations' *Sustainable Development Goals* (United Nations, 2015) and the educational materials they provide serve similar purposes. Most recently the OECD-PISA has started compiling tests to assess students' global competence, a construct that they define as “the capacity to examine local, global and intercultural issues, to

understand and appreciate the perspectives and world views of others, to engage in open, appropriate and effective interactions with people from different cultures, and to act for collective well-being and sustainable development” (PISA, 2017, p.7).

The Hungarian *National Core Curriculum* (Government of Hungary, 1996) prescribed the compilation of thematic collections for incorporating the ideals of democratic citizenship and intercultural education into the curriculum as early as 1996. Twenty years ago it already emphasized the importance of developing cultural awareness and an appreciation for people from other cultures as expressed, for example, in points 2, 3 and 7 of the general development objectives at the end of grade 10 (age 16) in foreign language learning:

It is required that [...] 2) students be able to establish new personal relationships through the foreign language, and appreciate the people and culture of other countries; 3) students be given a demonstration of the culture, civilization and unique values of the target country (countries), and by comparing these to their own culture, develop a more complex notion of Hungarian culture; [...] 7) students' knowledge of a foreign language also help them to become European citizens. (Government of Hungary, 1996, official translation)

The 2005 edition of the *National Core Curriculum*, the highest level regulatory document concerning the content of curricula and the principles and conceptual basis of public education, is based on values centered around democracy, humanism, respect for and development of the individual, promoting cooperation of core communities (family, home country, Europe, the world), gender equality, solidarity and tolerance. According to their guidelines for the teaching of foreign languages (Government of Hungary, 2005), the development of communicative competence includes the development and maintenance of pupils' positive and motivated attitude to language learning, the learnt language, the people speaking that language, their culture and learning about other languages and cultures in general.

The latest edition of the Hungarian *National Core Curriculum* (Government of Hungary, 2012) also highlights the importance of intercultural understanding, intercultural skills, intercultural communication and intercultural competence in the sections entitled “Communication in foreign languages”, “Social and civic competence” and “The principles and goals of teaching foreign languages”. The wording in the latter is not very precise, however:

The development of the general knowledge of the target language and intercultural competence: students must be able to interpret the differences between and similarities of their own culture and other cultures, and become more open and sensitive to other cultures. It is important to establish a positive attitude to and motivation for learning foreign languages and, in general, getting to know other languages and cultures. (Government of Hungary, 2012, p.48, official translation)

Policy documents do not usually recommend teaching methods to help achieve the expected learning outcomes they set. As a result, there is little information and guidance in curricula and other policy papers concerning the methods, approaches and techniques that are conducive to the development of intercultural competence.

### **2.3 Empirical research on the intercultural dimension in language (teacher) education**

Although a significant number of policy books and theoretical articles have been published on the theory and the role of intercultural competence in foreign language education (see Section 2.1 above), the number of empirical studies that have

investigated foreign language teachers' perceptions of the intercultural dimension in foreign language classes, their beliefs concerning integrated language and culture teaching, and their current practices, is relatively low. Byram and Feng (2004) reviewed work on the cultural dimension of language teaching and concluded that little effort had been devoted to empirical research investigating the impact of the development of these new conceptual frameworks. They do not only underline the importance of building up a body of knowledge in this area but also emphasize the need for a research agenda in order to acquire a systematic knowledge of language-and-culture teaching, the development of intercultural competence, the relationship between linguistic and intercultural competence, and the effects of both on social identities (p.149).

In Europe, the first notable exceptions to the lack of empirical investigation in this field were a comparison of British and Danish teachers' views on the role of culture (Byram & Risager, 1999), and Sercu's study on the views of English, French and German teachers in Belgium (Sercu, 2001). The English-Danish project (Byram & Risager, 1999) was concerned with the views of 212 English and 653 Danish teachers of foreign languages. The instruments used included both questionnaires and interviews. The other study (Sercu, 2001) investigated the views of 78 English teachers, 45 French teachers and 27 German teachers in Belgium with the help of a questionnaire. These two studies underline a growing awareness amongst respondents of the significance of the cultural dimension in a multicultural Europe, and a clear readiness to teach both language and culture. Both studies seem to show that Danish and British teachers, like Flemish teachers, believe that their pupils basically hold traditional stereotypes, but are gradually developing more diversified ideas, as more and more of them have the opportunity to travel. Unlike the Danish and British teachers participating in Byram and Risager's research (1999), Flemish teachers in Sercu's study (2001) attach higher importance to tourism and Civilization. In all countries, teachers seemed to give low priority to topics such as international relations and the target language culture's significance for the students' country, or cultural values and social norms.

The majority of teachers in the above studies (Byram & Risager, 1999; Sercu, 2001) do not have a systematic plan as to how to teach intercultural competence, or how to handle stereotypes and prejudice in the foreign language classroom. When asked about the details of incorporating culture into language teaching, respondents in both Denmark and the United Kingdom say that they consider it important to promote the acquisition of knowledge, since more knowledge is considered to lead to more tolerant attitudes. With respect to the way in which the foreign culture should be presented, an interesting difference seems to emerge between British and Danish teachers. While British teachers think they should present a positive image of the foreign culture, Danish teachers opt for a more realistic presentation. Finally, as in the Belgian sample investigated in Sercu (2001), there is a tendency amongst foreign language teachers to give low priority to the encouragement of learners' reflection on their own cultural identity. Both Byram and Risager (1999) as well as Sercu (2001) conclude that foreign language teachers are clearly willing to teach intercultural competence, yet in their actual teaching practice they appear to favor a traditional knowledge transfer approach.

In a significant volume summarizing the findings of a large-scale international empirical investigation into the role of intercultural communication in language teaching according to foreign language teachers' perceptions, Sercu, Bandura, Castro, Davcheva, Laskaridou, Lundgren, Mendez García and Ryan (2005) explored the following questions: (1) How do secondary school foreign language teachers' current professional self-concepts relate to the envisaged profile of the intercultural foreign language teacher? (2) To what extent is current language teaching practice directed towards intercultural competence? (3) What factors influence language teachers' willingness to incorporate the intercultural dimension into foreign language education?

This extensive study (Sercu et al., 2005) was conducted on a sample of 424 language teachers in seven countries. The main findings reveal that the great majority of teachers in Belgium, Bulgaria, Greece, Mexico, Poland, Portugal and Sweden regard themselves as being sufficiently familiar with the culture(s) of the foreign languages they teach despite the fact that teachers in Poland, Bulgaria and Mexico have fewer possibilities for traveling. Nevertheless, according to this study, the participating teachers' profile does not meet all expectations regarding the knowledge, skills and attitudes expected of a foreign language and intercultural competence teacher. The objectives of foreign language teaching continue to be defined in linguistic terms by most teachers. The great majority of the respondents in Sercu's study focus primarily and almost exclusively on the acquisition of communicative competence in the foreign language. If and when they include culture in FLT, the activities they use aim primarily to enhance learners' knowledge of the target culture, and not to encourage learners to search for information or to analyze this information critically. A large number of the teachers claimed to be willing to integrate intercultural competence teaching in foreign language education, but the data also showed that this willingness is reflected neither in their teaching practice, nor in their definitions of the goals of foreign language education (pp.13-20).

According to Sercu's evaluation of their findings, the implications for teacher education are the following:

Understanding teachers' perceptions and the reasons why they embrace or reject intercultural competence teaching is crucial for teacher educators who want to design (international) teacher education programmes which can clarify and exemplify to foreign language teachers how they can promote the acquisition of intercultural competence in their classes. Our findings highlight important differences and commonalities in teachers' perceptions. Both national and international teacher education programmes can build on these commonalities and have teachers from different countries cooperate, knowing that they all share a common body of knowledge, skills and convictions. They can also exploit differences between teachers to enhance teachers' understanding of intercultural competence. (pp.18-19)

In a study (Lázár, 2007) conducted among teachers in Hungary and three other countries, the main reasons why teachers fail to incorporate the intercultural dimension in English language teaching were their lack of first-hand experience of other cultures and their feelings of incompetence due to lack of training in the given area. Some of the participants blamed their coursebooks' deficiencies and others their own or their school's strong grammar and exam orientation. Novice teachers claimed to be preoccupied with classroom management and discipline issues or admitted having a poor repertoire of classroom activities with a cultural focus. Even the few participants who occasionally focused on the intercultural dimension of language teaching claimed to have difficulties "embedding" the activities in their lessons. Finally, and quite interestingly, some teachers had reservations about whether developing intercultural competence is the task of the language teacher at all (Lázár, 2007). What has happened in this field in Hungary in the past 10 years is not clear as no other large-scale study has been published on the frequency of culture-related activities in language classrooms and/or teachers' views on ICC since 2007.

A qualitative study (Lázár, 2011) exploring two Hungarian pre-service English teachers' beliefs about their role in the development of intercultural communicative competence examined what factors influence trainee teachers' beliefs and recommended action for reforms in teacher education based on the findings

about the many variables that have an impact on pre-service language teachers' personal theories about their role in developing intercultural competence.

A recent doctoral dissertation defended at the University of Pécs (Hungary) investigated the methods that the author's instructor colleagues used when teaching ICC in their compulsory lectures and seminars and what the teachers and students considered important and challenging in these courses (Menyhei, 2016). She found great variety in the teachers' teaching styles and concluded that the institution would benefit from determining a common approach to teaching and learning in the ICC courses. Menyhei (2016) also examined the students' views on the intercultural dimension and their development during her own seminars. Her course followed a social constructivist approach characterized by experiential learning including a number of CL activities that the students found unusual and challenging but enjoyable and useful.

The above results are not very surprising if we look at the courses offered by English language teacher education programs in the past decades. The intercultural dimension has not been incorporated for too long in teacher training. According to a document analysis (Lázár, 2013), in the 1970s and 1980s university-based English teacher training programs only offered target language civilization courses for future teachers in Hungary. In the 1990s, occasional optional courses on teaching language through culture and methodology of cultural studies appeared in the programs. In the academic year 2005/06, there were already several optional intercultural courses at many universities but 70% of all pre-service English teachers in Hungary could still graduate and become English teachers without learning anything about the development of intercultural competence (ICC). It was only in 2012/13 that ICC development became integrated in an increasing number of compulsory lecture courses, seminars and examinations for future English teachers in the seven university English teacher training programs in Hungary (Lázár, 2013).

A study conducted by Holló (2017) revealed that approximately 3% of the courses at a large university with a very good reputation in Hungary have intercultural content. In addition, it seems that many university instructors and managers still hold the view that

interculturality and intercultural communication are buzzwords; they are devoid of any real meaning. Many get on this bandwagon to sell their ideas. Interculturality has nothing to do with ELT or teacher training. It is another dimension. Developing the acceptance of difference and the rejection of hate speech are part of the socialisation process, and the domains responsible are the family, churches, schools and beyond. (a program manager's views quoted in Holló's study; p.77).

How schools are supposed to teach the intercultural dimension if teachers are not taught about the aims and methods remains an unanswered question. It is also questionable how credible any program with compulsory courses on intercultural communication can be if the leadership does not unanimously consider such courses to be of value. Indeed, many instructors and lecturers who focus on the development of intercultural competence feel that they are forcing their students to "swim against a very strong current at a faculty where very few of their other courses incorporate the intercultural dimension" (Holló, 2017, p.75). As it can be seen from the above, there are still many instructors and education managers at universities who are not familiar with constructivist approaches to teaching and/or do not think very highly of the role of ICC development today.

### **3 Research methods of the small-scale study**

#### **3.1 Research design**

This is a small-scale ongoing mixed-method research project consisting of a 90-minute professional development session for teachers and a survey filled out by the same teachers at the end of the session. The professional development workshop familiarized participants with the principles, tools and expected learning outcomes of cooperative learning, using cooperative structures to do so in order to provide a learning-by-doing experience as well as time for reflection for the participating teachers. The short survey filled out by the participants at the end of the session aimed to tap into their views on and practices of using CL in their classrooms.

#### **3.2 Research questions**

Based on the above, the following research questions were formulated to guide the investigation:

1. What do public school teachers know about cooperative learning?
2. What do they think cooperative learning develops?
3. Which components of intercultural competence are developed by cooperative learning?
4. How important do teachers find the principles and expected outcomes of cooperative learning?
5. How often do they use cooperative learning in their own classrooms?
6. What do they find difficult in implementing cooperative structures?

#### **3.2 Participants and context**

The seven workshops took place in different public schools in Budapest, Eger and Székesfehérvár (Hungary) either as stand-alone professional development sessions or within half-day or whole-day training events. The participants were 165 primary or secondary public school teachers, about 80% of whom were (mostly English) language teachers and approximately 90% had five or more years of experience in classroom teaching. A total of 128 of the 165 teachers responded to the survey. Those who did not either had to leave early or were unwilling to participate.

#### **3.3 The workshops**

The workshops on CL in the different schools were planned and facilitated by the researcher and always followed the same structure. The only minor differences in the program of the workshops were that in three cases a shorter version of the warmer described below was implemented because of a delay in the starting time and in two other cases the last activity had to be cut short because the previous discussions and activities lasted longer than had been planned. The language of the workshops was always Hungarian as this was the native language of all the participants.

At the beginning of each workshop, participants were asked to stand in one of the four corners of the room according to their knowledge of the principles and tools of CL. It was expected that although CL had been a buzzword in educational contexts for quite some time, few teachers would know exactly what it really meant. Still standing in the four corners, teachers were asked to form pairs or trios and discuss why they chose that particular corner. As a follow up to this warmer, the participants taught each other the principles of cooperative learning in an expert jigsaw activity with the

help of task sheets prepared in advance by the researcher-facilitator. Groups of four (or occasionally five) teachers were formed and re-formed on the basis of colours and numbers on their task sheets. This group work activity was followed by a short plenary session in which the competences that CL develops were elicited and put on the board.

The next stage was a group discussion at the end of which the groups answered the survey questions and drew an A4-size mind-map of their difficulties with the planning and implementation of CL. The rules of the group discussion required all participants to speak for a minute and to listen to each other actively as they had to summarize on the A4 size poster their partner's answers instead of their own.

The final stage of the workshop included a gallery tour in which groups had to visit each other's posters and ask questions or make comments. The workshop ended with a plenary discussion eliciting solutions for the difficulties written or drawn on the posters from each group in a word rotation manner, again ensuring that everyone got the floor at least once in each group and group members could not repeat the solutions that had already been presented by other groups.

The workshop used six different cooperative activities to teach about the principles and tools of CL in an experiential and reflective fashion: guided pair work, expert jigsaw, timed mini-presentations, partner's secretary, gallery tour and word rotation. This meant that in each 90-minute session, the participants experienced six activities that followed the principles of equal participation, parallel interaction, positive interdependence and individual accountability in the process of learning about CL.

### **3.4 Research instruments, data collection and data analysis**

In the research process, Creswell's (2003) guidelines were followed in the data collection and analysis stages. The researcher-facilitator took notes in her diary after each session and the survey posters were also collected at the end of each workshop. The survey posters designed by the researcher-facilitator and piloted with a group of trainee teachers at university contained two closed-questions to which answers about frequency and importance could be marked on a Likert-scale. The third question on the survey poster was open-ended and asked the group to prepare a mind-map (as described above in 3.3) containing all the challenges or difficulties they would encounter or had encountered when using CL structures in their teaching (see sample in Appendix). The survey was in Hungarian, which was the native language of all the participants.

Simple descriptive statistics were used to calculate the frequency of CL activities in the participants' practice according to their self-reports and the extent to which they considered the principles and expected outcomes of CL important. Ideas in the mind-maps were grouped into categories and summarized in a radar diagram.

### **3.5 Limitations and further research**

This pilot study analyzes the data collected with the help of a very simple research tool that showed the answers provided by a relatively small sample of 128 respondents, which obviously makes it impossible to draw far-reaching conclusions. On the one hand, the research tool can be further developed and, with the help of further professional development workshops, the number of respondents can also be increased. On the other hand, in a longitudinal study, follow-up interviews can be conducted with a selection of the language teacher participants of the different workshops to gain more in-depth answers and insights into what language teachers think about CL and its relationship to ICC and what factors influence their beliefs about teaching and their actual classroom practice.

#### 4 Results and discussion

The presentation of the results of the small-scale study conducted among public school teachers in professional development workshops will follow the order of the research questions in order to clearly and objectively present and then discuss the findings concerning the participating teachers' knowledge about CL prior to the sessions as well as their views and everyday practice concerning CL, ICC and other competences they regard as essential in the 21<sup>st</sup> century.

The sessions were run very similarly and the participants also reacted very similarly in the seven different locations. In the warmer it usually turned out that all participants had heard about CL but only a few of them had any experience with it. Another finding recorded in the researcher's diary is that there was only one workshop where one of the participants could actually list as many as three of the four basic principles of CL before the beginning of the expert jigsaw activity which aimed to help teachers learn these principles. In all the other workshops, there was no one at the start who knew what principles a CL activity had to follow. To answer research question 1, the majority of participants had some vague knowledge about CL being some kind of group work but only one out 128 respondents could actually list some of the principles of CL.

Participants at all the workshops collected approximately the same list of features that CL develops. The list of expected learning outcomes from empathy to cooperation and responsibility featured prominently in the collections we put on the board in the training room. In Table 1, the components of ICC based on Barrett et al. (2014) and the features that CL develops according to the participants are matched in order to answer research questions 2 and 3. As it can be seen, nearly all of the components identified by Barrett et al. had a (near) equivalent in the participants' collection of what CL develops.

<b>Shortened description of components of ICC based on Barrett et al. (2014)</b>		<b>Features that CL develops according to workshop participants</b>
<b>Attitudes</b>	Valuing cultural diversity and pluralism of views and practices	Interest in the others' views
	Respecting people with different cultural affiliations	Acceptance
	Being open and curious about and willing to learn from others	Willingness to learn from each other
	Being willing to empathize with people with different cultural affiliations	Empathy
	Being willing to question what is usually taken for granted	Self-assessment
	Being willing to tolerate ambiguity and uncertainty	Patience
	Being willing to cooperate with people who are perceived as different	Cooperation, responsibility

<b>Skills</b>	Multiperspectivity – the ability to decenter from one's own perspective	Looking at things from multiple perspectives
	Discovering information about others who are perceived as different	Learning from each other
	Interpreting others' practices, beliefs and values	Listening to and interpreting the other's opinion
	Empathy – the ability to understand and respond	Empathy
	Cognitive flexibility – the ability to adapt one's way of thinking	Flexibility
	Critical thinking in evaluating and making judgments about cultural practices	Critical thinking
	Adapting one's behavior to new cultural environments	Flexibility
	Using language to manage breakdowns in communication	Communication skills
	Plurilingualism to meet communicative demands	Not mentioned by participants
	Mediation – translating, interpreting and explaining	Interpreting the other's opinion
<b>Knowledge and understanding</b>	Understanding diversity and heterogeneity of groups	Understanding and accepting diversity of views and experiences
	Awareness of preconceptions, prejudices and discrimination	Not mentioned by participants
	Understanding of the influence of our own language and culture	Self-knowledge
	Awareness of differences in verbal and non-verbal communicative conventions	Knowledge about communication
	Knowledge of others' beliefs, values, practices, products and discourses	Learning about others' values and skills
	Understanding of interaction and knowledge construction	Knowledge about communication
<b>Other</b>		Time management
		Safe learning environment
		Motivation, responsibility, autonomy

Table 1. Description of components of ICC based on Barrett et al. (2014) with matching features that CL develops according to workshop participants

Out of the 128 participants in the survey, 122 (95%) found the principles and expected outcomes of CL very important or indispensable and only a total of 5% of the teachers considered these somewhat important or not important at all (see Chart 1). As for the frequency of CL activities in their classes only 7 (5%) of the teachers use them frequently and 60 (47%) claimed to use them sometimes (Chart 2). As the difference between rarely and sometimes was not specified in the research tool, it is probably safer to compare the proportion of teachers who considered the principles and expected outcomes of CL very important or indispensable (95%) and the proportion of teachers who say that they often use CL (only 5%). These figures answer research questions 4 and 5, and seem to mirror what often happens in education and in society as a whole: the values we stand for are often not reflected in our behaviour. Looking back at the study conducted by Sercu et al. (2005), we can draw a parallel as their data also showed that teachers' willingness to incorporate ICC in their teaching is reflected neither in their practice nor in their definitions of the goals of foreign language education.

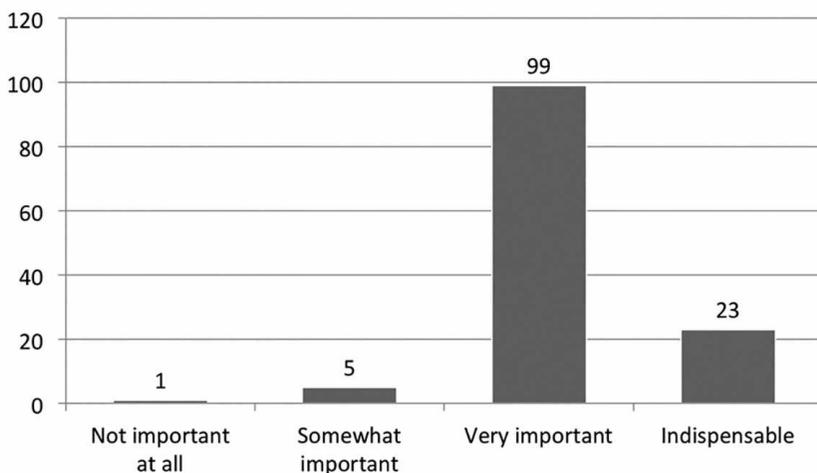


Chart 1. How important do you consider the principles and expected learning outcomes of cooperative learning? (n=128)

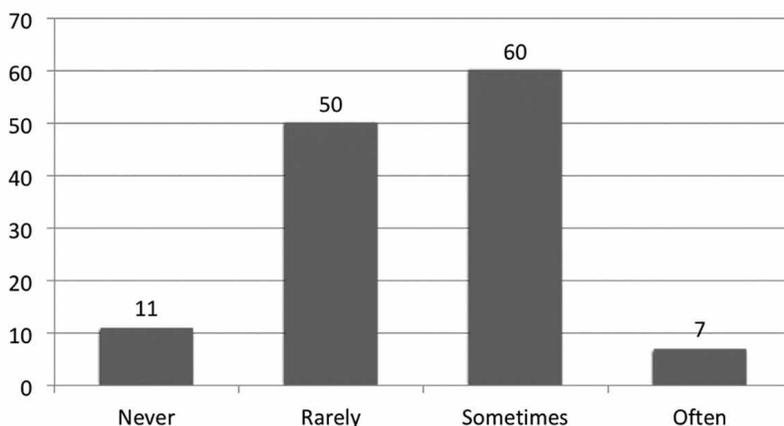


Chart 2. How often do you use cooperative learning in your classrooms? (n=128)

Another important question attempted to explore teachers' difficulties with implementing CL. The five most common challenges were 1) the time it takes to prepare and organize CL activities (22 out of the 32 groups mentioned this), 2) classes are very heterogeneous, mixed-ability classes (18 mentions), 3) students are not used to it, many are difficult to either involve or discipline (17 mentions), 4) there is not enough space in the classroom and/or not enough time in a lesson for CL activities (13 mentions), and 5) the number of students in a class is too high for group work (10 mentions). For a visual representation of the answers to research question 6, refer to Chart 3.

Other difficulties that were mentioned by only a few of the 32 groups included

- lack of students' interest, experience, motivation, responsibility, ability to cooperate
- students' selfishness, misbehaviour, tendency to start conflicts
- lack of tools (posters, cards, markers)
- too much noise
- difficulties in assessment (how to give grades on group work)
- teacher's difficulty in monitoring cooperative pair and group work activities

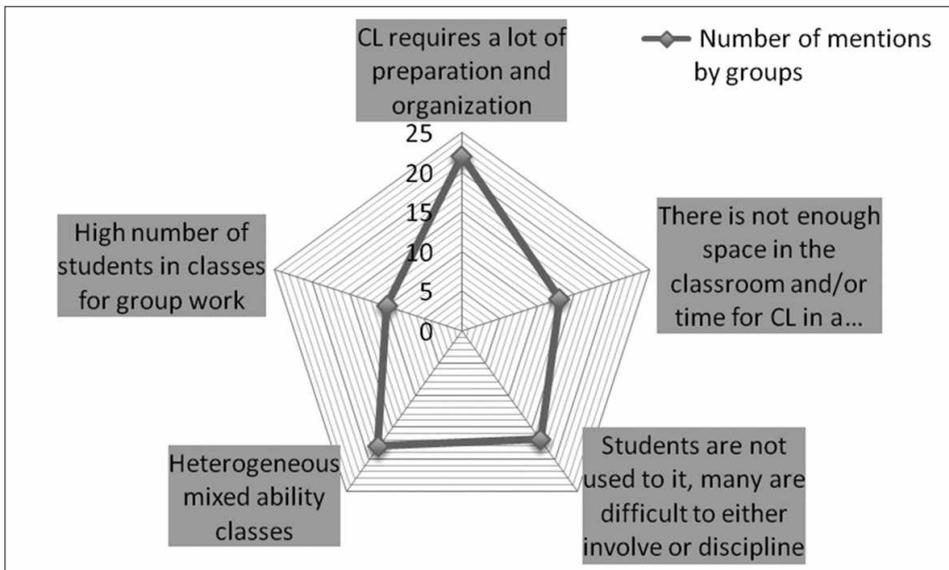


Chart 3. What difficulties do you (or would you) encounter when using cooperative learning? (n=32 groups of 3, 4 or 5 members)

It is interesting to note that many of the difficulties teachers think they would have with CL, especially the ones involving students' motivation, responsibility, autonomy, empathy and other personal qualities and attitudes, correspond precisely to the features that CL develops much more than traditional frontal teaching as described in Section 2.1.2. Another point of observation worth reflecting upon is that many of the difficulties and challenges listed by the participants focus on outside factors such as their students' abilities and behaviour or lack of time, space and resources. No group of teachers mentioned what may be some of the largest obstacles in the way of changing classroom practices, namely teachers' own reluctance to let go of traditional routines involving tighter control over what is happening in a classroom and their unwillingness to take risks by experimenting with something new even if it promises to develop the competences they consider essential. These findings are in

line with the results of the empirical studies by Lázár (2007, 2011) and Menyhei (2016) in Hungary and with the findings of Sercu et al. (2005) in a wider international context.

## 5 Conclusion

This study attempted to explore what policy documents require from learners relating to intercultural competence, what public school teachers know about, think of and do with cooperative learning in Hungarian classrooms in 2019, and whether CL develops or would develop the learners' intercultural competence. A small-scale study does not allow us to draw far-reaching conclusions but it is interesting to note that the great majority of the 128 participating public school teachers in this research had only vague ideas – if any – about the rules and principles of CL at the start of the workshops, despite the fact that CL had long been included in pre- and in-service teacher education programs. However, once they were familiarized with the principles and techniques of CL in the experiential workshop described in detail in Section 3.3 of this study, the participants could easily list all the competences and qualities that CL develops which, in turn, seem to correspond to a large extent to the attitude, skill and knowledge components of ICC adapted from Barrett and his colleagues (2014). However, according to the majority of the participants' self-reports they rarely use any cooperative structures in their lessons, despite the fact that they find the expected outcomes of CL very important or even essential for the development of their learners.

When describing the difficulties and challenges they encounter or would expect to encounter in implementing CL in their lessons, other than complaining about the time invested in preparing and organizing these activities, teachers tended to blame external factors such as a lack of resources or the students' selfishness, misbehaviour, inability to cooperate and lack of motivation to actively participate. Ironically, if teachers were to incorporate more cooperative structures in their lessons, it is precisely these qualities, skills and attitudes that they would be developing in their learners.

As a follow-up to the research described here it will be important and interesting to investigate why teachers did not even mention their own reluctance to reduce the amount of time devoted to frontal teaching in their classrooms and their own unwillingness to take risks by organizing the teaching-learning process along different lines from those we call 'traditional' and by encouraging a more learner-centered approach conducive to the development of intercultural competence, among other benefits. To this end, follow-up interviews are planned with a selection of the language teacher participants of the different workshops to gain insights into what factors influence teachers' beliefs about the aims of language teaching, the most efficient teaching methods and teachers' actual classroom behaviour.

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## APPENDIX

Sample survey poster filled in by a group of participants in one of the workshops

A csoport tagjai: P. M. K. (György), J. M. (Tünde)

1. Mennyire fontosak nekünk ezek az alapelvek és ezeknek a kompetenciáknak a fejlesztése?

Nem	Kicsit	Nagyon	Elengedhetetlen
			X X X X

2. Milyen gyakran használunk kooperatív tanulászervezési formákat?

Soha	Ritkán	Ióssként	Cyakra
	X X	X X	

3. Ilyen nehézségeink, fenntartásaink vannak a kooperatív tanulással (gondolattérkép):

```

graph TD
    A((NEHÉZSÉGEK)) --- B((MOTIVÁCIÓ HIÁNYA))
    A --- C((SZERVEZÉS SÉ!))
    A --- D((IDŐKERET Kétség!))
    A --- E((KÖLTSÉGETI HATÁSOK  
GALLO, VERSENYKÉPELÉS))
    A --- F((KOROSZTÁLY  
(Tel. fideszről oktatás)))
  
```

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# DEALING WITH GLOBAL, LOCAL AND INTERCULTURAL ISSUES FOR GLOBAL COMPETENCE DEVELOPMENT IN TEACHER TRAINING: A PILOT STUDY ON THE VIEWS OF UNIVERSITY TUTORS IN HUNGARY

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## Abstract

In today's divisive world, education needs to empower students to become active global citizens who are prepared for the challenges of the 21st century and who can solve local and global problems. The urgency of the implementation of global education is stressed by the fact that in many countries, OECD PISA has already started to measure students' global competence. As teachers are often seen as educational gatekeepers, who decide on the content and the quality of the learning experience, it is worth examining their views on the global dimension of education. This pilot study has a dual aim. First, it proposes an interview guide specially designed to explore teachers' views on *global competence development* (GCD). The other aim of the study, involving four participants working in an EFL teacher training programme in Budapest, is to reveal their views on GCD and their perceptions of their role in developing their students' global competence. Findings suggest that participants have a reasonable understanding of GCD, but they lack some knowledge about its dimensions. Also, they think that they play an important role in developing their students' GCD, mostly by selecting appropriate topics to raise their awareness of certain issues and by acting as role models. As the results indicate, it might be advisable to incorporate GCD more clearly, systematically and with well-defined goals in the EFL teacher training programme.

## 1 Introduction

Global education has gained considerable importance in English language teaching in the past three decades (Cates, 2002) as several authors have been advocating for the inclusion of real-world issues in the language classroom to provide students with meaningful content while also developing their language skills (Cates, 2002; Maley, 2004; Sampedro & Hillyard, 2004; Ruas, 2017). In 2014, the promotion of global education entered a new phase, when UNESCO proposed a new educational framework, called *Global Citizenship Education* (GCE), with the aim of nurturing global citizens and preparing students for the challenges of the 21st century (UNESCO, 2015). The urgency of implementing the GCE framework has been further emphasised by the fact that the OECD PISA started to assess students' global competence in 2018 (PISA, 2017).

Some of the challenges people face today include navigating through an increasing amount of information, distinguishing between fact and opinion, and

interpreting what is going on around them in the world (Oxfam, 2018; UNESCO, 2015). Therefore, the main aim of GCE is to provide students with the “opportunity to develop critical thinking about complex global issues in the safe space of the classroom” (Oxfam, 2018, p.1). In such an environment and with such an aim, there is a need to shift from “passive to active learning, from teacher- to student-centred learning, from language as structure to language for communication about the world” (Cates, 2002, p.45). As global classrooms are also learner-centred classrooms (Pike & Selby, 1988), in order to educate global citizens for this new reality, teachers need to assume new and different roles and reconsider what and how they teach (Cates, 2002).

Teachers are usually seen as educational gatekeepers (Thornton, 1991), who decide on the content and quality of the learning experience; thus, it is worth examining their views on the global dimension of education when it comes to the implementation of the GCE framework. In the Hungarian context, there is a dearth of research in the field of global education in ELT, so this paper is intended to fill part of the gap. The pilot study presented in this paper has two aims: a research methodological one and an empirical one. On the one hand, it is intended to validate a newly designed interview guide to be used to explore EFL teachers’ views on global competence development in Hungary. On the other hand, it aims to reveal EFL teacher trainers’ views on global competence development and their own perceived role in developing their students’ global competence in an EFL teacher training programme in Hungary.

## 2 Review of the literature

### 2.1 Global citizenship education and global competence development in ELT

The umbrella term *global education* (GE) has been widely used in the past 30 years to refer to an educational paradigm with the aim of nurturing students to become responsible citizens who can contribute to the creation of a better world. The present paper uses the term *global education* when referring to *global citizenship education* (GCE), which encapsulates “how education can develop the knowledge, skills, values and attitudes learners need for securing a world which is more just, peaceful, tolerant, inclusive, secure and sustainable” (UNESCO, 2014, p.9). It incorporates all the theories and methodologies that were already implemented by human rights education, peace education and education for sustainable development (UNESCO, 2014). Global education has widely influenced education systems all around the world (UNESCO, 2015) and the global component is present in the core curricula of several countries (e.g., the UK, Australia, Colombia, the Republic of Korea, etc.) (UNESCO, 2015).

Its significance is also supported by the fact that the OECD PISA started to assess students’ global competence in 2018. By their definition, *Global Competence*

is the capacity to examine local, global and intercultural issues, to understand and appreciate the perspectives and world views of others, to engage in open, appropriate and effective interactions with people from different cultures, and to act for collective well-being and sustainable development. (PISA, 2017, p.7)

A globally competent student thus has knowledge about the world and other cultures, has the skills to understand the world and take action, has the attitudes of openness, respect for people from different backgrounds and global mindedness, and values human dignity and diversity (PISA, 2017).

Several factors have contributed to the importance of the incorporation of the global dimension in ELT. Firstly, English has gained considerable importance in our increasingly interconnected and globalized world as there is greater contact between

people from various parts of the globe. As a result, the importance of teaching the language now lies in the preparation of students for intercultural dialogue (Gimenez & Sheehan, 2008). Secondly, in our ever-changing, fast-paced world, education in the 21st century has to cater for different needs than before: in order to prepare learners for an unpredictable job market, teachers now also have to develop their students' 21st century skills (NEA, n.d). According to the Partnership for 21st Century Skills, these include three main types of skills: *learning and innovation skills* (i.e., creativity, critical thinking, communication, collaboration); *information, media and technology skills* (i.e., information literacy, media literacy, ICT literacy) and *life and career skills* (i.e., flexibility and adaptability, initiative and self-direction, social and cross-cultural skills, productivity and accountability, leadership and responsibility) (Partnership for 21st Century Learning, n.d). The P21 Framework emphasises that these skills should be taught discretely in the context of the key subjects (e.g., Language Arts, World Languages, Mathematics, Science, History) and 21st century interdisciplinary themes (e.g., global awareness, environmental literacy, health literacy). Therefore, these skills can be developed during English lessons while students also work on their four basic language skills. Thirdly, people around the world have to deal with many global issues (e.g., radicalisation, racial and religious tension, and global warming) and it is getting harder than ever to understand and react to what is happening around us. Therefore, there is an increasing need in education to address these difficult issues in a protected environment, under the guidance of teachers, and to enable young people to react to them. As according to UNESCO MGIEP (2017), the language lesson is an "open-content space" (p.158), it lends itself to the discussion of real-world issues and to the development of the aforementioned skills and thus, it may be the perfect terrain for the development of students' global competence.

## 2.2 Global teachers' roles and competences

Teachers are instrumental in implementing the global perspective in their lessons because of their role as educational gatekeepers, who constantly make decisions on what is taught and how it is taught (Thornton, 1991). As Kirkwood-Tucker noted (1990, cited in Bourn, 2015, p.66), "teachers [are] more influential than textbooks as the primary source of information for students about global education." Given the fact that the aim of global education is to make the world a better and more just place, teachers who opt for the inclusion of the global perspective are often seen as agents of change (Bourn, 2015), hence the currently spreading term *global teachers*.

Nevertheless, this role is often perceived as controversial. Apart from the fact that global educators should create a new type of learning environment and promote new ways of learning, they are also expected to promote values committed to social justice (Bourn, 2015). For this reason, they are often accused of pushing political agendas and brainwashing students (Brown, 2009). According to the leading figures of critical pedagogy though (Freire, 2014; Giroux, 1997), education is an inherently political act and teachers are key actors in effecting change in their communities. Freire (1985) claims that education cannot be neutral and if educators want to make a difference, they cannot shelter their students from challenging issues in the classroom. Brown (2009) points it out that discussing "hot topics" and engaging in critical pedagogy comes with some moral dilemmas. According to him, even if the teacher has good intentions and wants to act as an agent of change, the question arises: how far should they "push their own personal beliefs and agendas" (p.269) in their mission to nurture critical thinkers? Sargent (2007) also addresses the dangers of brainwashing students; nonetheless, he posits that it is feasible to deal with controversial issues in the context of global education in a multidimensional way, without championing one view over others.

Besides their role as agents of change, global teachers are supposed to have specific characteristics. In order to be credible in their role of promoting global citizenship, teachers, first and foremost, must become global citizens themselves (Andreotti, 2012 as cited in Bourn, 2015). Several authors have attempted to draw up the profile of a competent global teacher and describe all the knowledge, skills and attitudes they need in order to be able to nurture global citizens. The Longview Foundation (n.d.), in its *Teacher Preparation for a Global Age* also claims that global teachers need to be global citizens, who have the following competences:

1. Knowledge and curiosity about the world's history, geography, cultures, environmental and economic systems and current international issues;
2. Language and cross-cultural skills to communicate effectively with people from other countries, understand multiple perspectives, and use primary sources from around the globe;
3. A commitment to ethical citizenship (p.7).

Apart from these competences, they also possess:

1. Knowledge of the international dimensions of their subject matter and a range of global issues;
2. Pedagogical skills to teach their students to analyse primary sources from around the world, appreciate multiple points of view, and recognise stereotyping;
3. A commitment to assisting students to become responsible citizens both of the world and their own communities (p.7).

UNESCO (2018, p.5) promotes a similar set of competences for global teachers: according to them, educators need to “[have] strong subject and pedagogic content knowledge, possess effective classroom management skills, readily adopt new technologies, and be inclusive and sensitive to the diverse needs of their students.” Based on Pike and Selby's (1988) more detailed profile, a global teacher:

1. is 'global centric' rather than ethnocentric or nation centric;
2. is concerned about culture and perspective;
3. is future-oriented;
4. is a facilitator;
5. has a profound belief in human potential;
6. is concerned with the development of the whole person;
7. employs a range of teaching/learning styles in the classroom;
8. sees learning as a life-long process;
9. tries to be congruent;
10. is rights-respectful and seeks to shift the focus and locus of power and decision-making in the classroom;
11. seeks functional interdependence across the curriculum;
12. is a community teacher (Pike & Selby, 1988, pp.272–274).

As it can be seen from the above, becoming a global teacher is not an easy undertaking, but requires a significant amount of preparation and new pedagogical thinking; nevertheless, failing to meet these requirements is seen as one of the greatest barriers to the implementation of GCE (UNESCO, 2018).

### 2.3 Teachers' views on global education

Becoming a global teacher also presupposes understanding the aims of global education and believing in its importance. Empirical studies show that *teacher agency* has an important role to play in the implementation of GCE in schools and that “[teachers’] perceptions and stances profoundly impact GCE outcomes even if the school or national education policy explicitly mark GCE as a priority – but especially in contexts that lack such clarity” (Goren, 2017, p.11). In what follows, a brief overview of such empirical studies from several teaching contexts in different parts of the world is given, citing examples of what views teachers hold on global education in Slovenia, Canada, Israel, and Turkey.

In Slovenia, Skinner (2012) conducted semi-structured interviews with teachers and headteachers in two high schools to inquire into their perceptions of global education. What she found was that although GCE is not explicitly included in the curriculum in Slovenia, teachers had a reasonable understanding of the premises of global education and they also had a positive attitude towards bringing the global perspective to their subjects. They also felt that including the global dimension in class was done “intuitively and was part of being a good teacher.” As one of them put it, “being a teacher is trying to teach them to be responsible grown-ups sooner or later, not just to teach them maths or whatever your subject is” (p.48). Many teachers equated global education with 21st century quality education. Apart from the transformative nature of GCE, they also praised it for its social justice dimension and its “active and critically reflective approaches” (p.48). Although most teachers spoke highly of the concept of global education, they also highlighted that it is often difficult to deal with global issues and involve students in active learning “due to time constraints and the quantity of curriculum material to cover” (p.59). They also noted that “the school system is creating pupils who are able to reproduce a lot of knowledge but without the skills to know how to apply [it] and make it relevant to everyday life”, and they felt that GCE can be a tool for bridging that “theoretical-practical gap” (p.68).

In her case study, Guo (2014) attempted to gain a deeper understanding of 45 Canadian teacher candidates' views on GCE during an Educating for Global Citizenship course that she taught. She found that although the candidates recognized the significance and their responsibility in nurturing global citizens, they “reported limited understanding of and experiences with global citizenship education” (p.8). Participants also indicated that although they had encountered “teachable moments” connected to themes of GCE, they could not fully exploit these moments given their lack of ability and proper training to do so. However, during the course, they “gained new understandings of global citizenship education” (p.10) and by the end of the course, all teacher candidates had indicated that “they could incorporate GCE topics in teaching practices” (p.11) no matter what their subject matter was. Among the benefits of GCE, they mentioned its “allowance of creativity and deviation from a typical curriculum” (p.11) and also its ability to serve as “an impetus to become knowledgeable in global issues and current affairs and getting creative with the given curriculum” (p.12). Finally, they also voiced their needs related to implementing GCE: they felt that they would need more practice-oriented professional development courses and more resources in order to successfully incorporate the global dimension.

In Israel, Goren and Yemini (2017) interviewed 15 teachers teaching in secular Jewish schools in Tel Aviv about their perceptions of GCE. As there is no mention of GCE in formal curricula, teachers agreed that “their own motivation and perceptions of their roles played a key part in the extent to which they introduced GCE-related contents in their classrooms” (p.18). All the participating teachers saw themselves as “agents of GCE” and all of them believed that it is their responsibility to prepare students “to function in a global society” (p.18). They also noted that while they felt

committed to GCE, they were “highly sceptical that all teachers would be inclined to incorporate it,” especially in schools lacking resources (p.18). One participant pointed out that in the end, “it all depends on the teacher. I think global citizenship is important, so I bring it into my classroom (p.18)”. As Goren and Yemini put it, teacher agency can become problematic “if the curriculum does not actively include global citizenship and its themes [and] the extent of GCE introduced into the classroom depends on teachers themselves” (p.18). According to them, these findings strongly suggest that GCE should be addressed in teacher education to raise trainees’ awareness and develop their pedagogical skills to deal with controversial issues; and a proper policy in this regard should also be created in Israel.

Başarir (2017) aimed to explore the perceptions of 13 English instructors teaching at Turkish universities regarding the integration of GCE into ELT courses. Three of the participating instructors stated that they felt they had no role in preparing students to become global citizens; however, 10 of them said that they had a responsibility to either act as an informer (n=6) or as a role-model (n=4) for their students. But only 5 participating teachers claimed that they deliberately incorporated the global dimension in their lessons, by setting up discussions about global issues, reading about global issues and reflecting global citizenship in their own behaviour. The rest of the participants stated that GCE was “irrelevant” in English lessons (p.417). All the participants claimed that the “current ELT curriculum they were following did not educate students as global citizens” (p.418). As Başarir concludes, the results clearly show “the lack of knowledge of the participants about the topic” and that teachers who are “unaware of their role and responsibilities in the development of global citizenship in their students, reflect their ideas into their classroom practices” (p. 420). Finally, she states that it would be useful to organise in-service training on the incorporation of GCE in order to effectively help teachers nurture global citizens.

Even though most of the above-mentioned studies were based on qualitative data collected from small samples of participants and were carried out in very different contexts among teachers with different levels of teaching experience, it is possible to identify some recurring themes. In most cases, the findings suggest that if teachers understand the main premises of global education, they tend to find it important. It seems that whether the global dimension is explicitly included in the main curriculum or not does not necessarily influence teachers’ perception of the importance of GCE (see Goren & Yemini, 2017). The perceived benefits of GCE include learning about global issues and being able to use learner-centred methodologies (Guo, 2014; Skinner, 2012). However, many participating teachers in these studies expressed their concerns about their insufficient training to deal with these issues in class, their lack of knowledge about global issues, the lack of support from educational stakeholders, the student’s lack of interest in these issues and time constraints (Başarir, 2017; Guo, 2014; Skinner, 2012). Whether teachers incorporate the global perspective or not, mostly depends on teacher agency, for it is the teachers who effectively act as educational gatekeepers, just as Thornton (1991) put it. Initial teacher training seems to play a significant role in this decision making, as trainees who have received training in dealing with global issues tend to have a better understanding of the global dimension and feel more confident about incorporating GCE themes in their lessons (Guo, 2014).

## 2.4 Rationale for the study

The Hungarian Government accepted the Nemzetközi Fejlesztési Stratégia (International Development Strategy) in 2015 (Government of Hungary, 2015), committing itself to the inclusion of global citizenship education on all levels of the Hungarian educational system (HAND, 2016). There seems to be “no accredited formal

global educational curriculum in any level yet" (CONCORD, 2018, p.72) but it is reported that the "work is ongoing regarding the integration of GE into the national curriculum at primary and secondary level" (p.72). Nevertheless, the Hungarian National Core Curriculum (NCC) already contains some aspects of global citizenship education. One of the stated overarching aims of public education is to "educate individuals who are committed to truth and fairness, the good and the beautiful, and to develop the intellectual, emotional, social and physical abilities that are required for the evolution of a harmonious personality" by helping them to

1. become responsible citizens;
2. develop objective self-knowledge and reliable ethical judgement;
3. find their place in the family, in small and large communities and in the world of work;
4. be able to make responsible decisions about their own lives and that of those in their care;
5. become able to gain information, form opinions and act independently;
6. get to know and understand natural, social and cultural phenomena and processes;
7. value the preservation of diversity of culture and the living nature and act accordingly (Government of Hungary, 2012, p.7).

The educational goals include *Sustainability and Environmental Awareness, Education for democratic citizenship, Development of self-knowledge and community skills* and *Media Literacy* (Government of Hungary, 2012). Moreover, the core competences students have to acquire by the end of their studies include *Social and civic competence* and the *Sense of initiative and entrepreneurship*. It is also important to note that based on the NCC, "special significance must be attributed to the formation and development of intercultural awareness" (p.49), which is an important part of global competence as well.

Although based on the educational goals the school should be the place where students become active democratic citizens, there is a widely held view in the Hungarian society that politics should be banned from schools (Hunyadi & Wessenauer, 2016). Nowadays, people associate politics with party politics, with all its potentially negative overtones, and other aspects of politics, including social and human rights issues, get banned from schools as well, so many teachers feel that they are not allowed to discuss public affairs with their students (Hunyadi & Wessenauer, 2016). As a result, students do not have the opportunity to discuss complex, often controversial issues under the guidance of their teachers (Hunyadi & Wessenauer, 2016). The negative consequences of the taboo of politics are quite apparent: several studies indicate that Hungarian students are apathetic and disillusioned with politics, which is manifested in their lack of interest and participation in public affairs (Gáti, 2010; Integrity lab, 2016; Szabó & Kern, 2011). However, other studies show that they want to make their voices heard, they want to talk about current issues, and they feel that their schools should have a role in preparing them to do so (Torney-Purta, Schwille, & Amadeo, 1999; Flash Eurobarometer 202, 2007). The majority of the participating students in the CIVED study (Torney-Purta et al., 1999) claimed that this dimension is missing from their education (Gáti, 2010). Adopting the global perspective could be a remedy to this situation, but first, it would be imperative to examine how Hungarian EFL teachers view GCD and how they see their role in fostering the above-mentioned competences.

Despite the relevance and urgency of the implementation of GCE, apart from two studies, inquiring into the presence of the global dimension in the pedagogical objectives in high schools (Molnár & Hörich as cited in Hain & Nguyen, 2012) and the

presence of the global dimension in teacher training (Hain & Nguyen, 2012), research on global education in Hungary is virtually non-existent. Moreover, there has not been any research into the global dimension in ELT apart from the author's own (Divéki, 2018). As Guo (2014) pointed out, initial teacher training has a great impact on novice teachers' views on the incorporation of the global perspective, so it would seem to be a logical step to start investigations in this context. The present study aims to fill this research gap by examining EFL teacher trainer's views on GCD.

## 2.5 Research questions

The following research questions arise based on the literature and the aims of the study:

RQ1 – What are the views of university tutors involved in EFL teacher training at a Hungarian university on developing students' global competence?

RQ 1.1 What do these university tutors involved in EFL teacher training understand by global competence development?

RQ 1.2 How do these university tutors involved in EFL teacher training view their role in developing students' global competence?

RQ2 – Does the interview guide elicit appropriate data to answer RQ1 and its sub-questions?

## 3 Methods

The following section comprises the detailed description of the participants and the setting of the study. It also outlines the methods of validating the proposed instrument and the methods of data collection and analysis. Finally, it addresses the steps taken to meet the quality criteria of qualitative studies.

### 3.1 Participants and setting

The participants of the study were selected using purposive sampling strategies. As one of the aims of the study was to reveal teacher trainers' views on global education in a teacher training institute, the most popular EFL teacher training programme at a prestigious university in Budapest was chosen as the context of this study.

Maximum variation sampling was used in order to ensure the greatest variety of participants. Apart from the exploration of the variety of responses, as Dörnyei (2007) suggests, the great benefit of this procedure is that it "underscores the commonalities" and in this way, any pattern the researcher finds might be assumed to be "reasonably stable" in the given population (p.128). What the participants had in common was that they all teach the courses *Language Practice 1* and *2*, a compulsory two-term course (approximately 100 hours) for all first-year English majors and EFL teacher trainees.

Four participants, two males and two females, were selected for this pilot study, representing different age groups and having different lengths of teaching experience. Two of the participants were core members of the selected department (one of them was retired), the other two tutors were temporary lecturers. Even though three of them were teachers of other subjects as well, they were mainly involved in teaching English at the time of the interviews.

<b>Pseudonym</b>	Ilona	Ulrich	Adél	Zsigmond
<b>Teaching experience</b>	26 years	35 years	4 years	39 years
<b>Teaching experience in the research context</b>	3 years	26 years	3 years	28 years
<b>Graduated from</b>	University of Pécs	University of Leipzig	Eötvös Loránd University, Budapest	Eötvös Loránd University, Budapest
<b>Other subjects ever taught</b>	-	German as a foreign language	Hungarian language and literature	Geography
<b>Core member</b>	no	yes	no	yes (retired)

Table 1. Interviewee's profiles

### 3.2 Validation of the instrument

One of the aims of this study was to propose and validate a new instrument to be used to gain insight into teachers' views on global competence development. The following steps were taken to design and validate the interview guide:

1. Review of the literature;
2. Self-interview and reflection;
3. Writing up broad themes based on the literature and reflection;
4. Developing questions based on the themes, creating the first draft of the interview schedule;
5. Subjecting the first draft to expert judgement (to the author's PhD supervisor);
6. Correcting the first draft of the interview schedule, creating the second draft and its English version;
7. Subjecting the second draft and its English translation to expert judgement (to the author's PhD supervisor and fellow PhD students);
8. Correcting the second draft and finalising the interview schedule to be piloted;
9. Conducting the four pilot interviews;
10. Creating the transcripts;
11. Analysing the data;
12. Drawing conclusions about whether the interview guide elicited appropriate data;
13. Finalising the interview guide based on these findings.

The above-mentioned steps are further elaborated on in Sections 3.3, 3.4 and 4.3.

### 3.3 Methods of data collection

To tap into teacher trainers' views on global competence development, semi-structured interviews were conducted. The languages of the interviews were Hungarian and English as in one case the interviewee and the interviewer did not share the same mother tongue. First, the Hungarian instrument was prepared and then it was translated to English and checked by the author's supervisor and fellow students in the PhD Programme she attends. The instrument was designed for collecting data

for two different research projects: the present one and one on teachers' attitudes towards teaching global, local and intercultural issues; thus only half of the interview schedule focused on views on GCD and university tutors' perceived role in GCD.

During the interviews, the tutors were asked to briefly define what knowledge, skills and attitudes they believe make someone successful in the 21<sup>st</sup> century. Then they were invited to enumerate the components of global competence, to ponder the importance of global competence development, whether they think they are globally competent, and whether they consider themselves as global citizens. They also had to draw up the profile of a global teacher and were asked to think about their role and whether they consider themselves to be *educators* or *language teachers*. Finally, they were asked about how they see the role of GCD in EFL teacher training.

The interview questions were developed on the basis of the literature and the author's own interest in the topic. First, the main topics were drawn up and the first draft of the interview protocol was developed based on these themes. The first draft was subjected to expert judgement during a consultation session with the author's PhD supervisor. The main modifications were in connection with the order of the questions, and the order of the two main parts of the interview was switched. The second draft was handed to the supervisor and to the author's course mates and Research Seminar course tutor at her PhD programme. At this stage of validation, only some minor changes were implemented, and the interview guide for the pilot study was finalised (for the interview guide used in the pilot study, see Appendix A).

### 3.4 Procedures of data collection and analysis

The interviews took place in the training institution, in the tutors' offices between 14<sup>th</sup> March 2019 and 25<sup>th</sup> March 2019. The interviews lasted between 40 and 60 minutes and they were audio-recorded with two mobile devices after the participants' consent was obtained.

The interview data were transcribed right after the interviews. After the preparation of the transcripts, the initial coding of the data began by reading the scripts carefully and then labelling and commenting on the script. Using the constant comparative method, "designed to identify themes and patterns in qualitative data" (Maykut & Morehouse, 1994, p.159), the data were broken down into meaningful units and coded into categories. Each new unit of meaning was then subjected to analysis, compared to the other meaningful chunks and then, grouped with other units of meaning. If there was no already existing similar unit, a new category was formed (Maykut & Morehouse, 1994).

Throughout the validation process, the author went into great lengths to ensure that the study would meet the quality criteria of qualitative studies. The *credibility* of the study was established by using member checking; the transcripts were sent back to the participants to give them the opportunity to check and correct what they had said in the interview. The parts they deemed unsuitable were taken out of the transcripts and were not subjected to analysis. The researcher aimed to meet the criteria of *transferability* by attempting to give a detailed description of the research context and the procedures. The *dependability* of the study was ensured by the use of the same semi-structured interview guide and mostly asking the same questions of the participants in order to avoid bias. Finally, the *confirmability*, or the neutrality of the study was established by the help of a co-coder, whose codes were compared to the researcher's.

## 4 Results and discussion

### 4.1 What do teachers mean by global competence development?

#### 4.1.1 Succeeding in the 21<sup>st</sup> century

Educational stakeholders have been stressing the importance of developing students' 21<sup>st</sup> century skills in recent years (NEA, n.d.) and 21<sup>st</sup> century skills are inherent to global competence as well. Therefore, instead of asking participants directly about the components of GC, they were asked to enumerate what knowledge, skills and attitudes a student should have in order to succeed in the 21<sup>st</sup> century.

Knowledge	Skills	Attitudes
Encyclopaedic knowledge professional, expert knowledge subject knowledge self-knowledge	<p><i>Learning and innovation skills:</i> Reflection Having an opinion Argumentation Problem-solving Creating something new Having ideas Cooperation Ability to think Critical thinking Language skills</p> <p><i>Information, media and technology skills:</i> Presentation skills</p> <p><i>Life and career skills:</i> Listening to each other, active listening Changing perspectives Holding ideas loosely Respecting each other's points of view Interpersonal, social skills Dealing with conflicts Making compromises</p>	Openness Empathy Criticality Positivity Life-affirming attitude

Table 2. 21<sup>st</sup> century expectations from students based on the participants' answers

Even though there have been several attempts to establish a framework for 21<sup>st</sup> century skills (Partnership for 21<sup>st</sup> Century Learning, n.d.), not much has been said about knowledge and attitudes in these discussions. This also became apparent in the participants' answers. They had no difficulties in enumerating skills that would fit the P21 framework (see Section 2.1), but they were more hesitant when it came to knowledge or attitudes (see Table 2). Three of the participants questioned whether *encyclopaedic knowledge* is important in the 21<sup>st</sup> century and they claimed that it is more important to know where to find this sort of information. They placed more emphasis on professional, expert knowledge in one particular area and self-knowledge. When it came to attitudes, most of the participants mentioned openness in one way or another, and empathy, positivity and a life-affirming attitude were also mentioned.

#### 4.1.2 Being globally competent

After discussing what makes a student successful in the 21<sup>st</sup> century, the participating tutors were shown a definition of global competence and were invited to ponder what makes someone a globally competent citizen or a global citizen. Ulrich also gave his own definition of a global citizen; as he put it:

a global citizen is someone who is very much rooted locally... [...] You know, a good local citizen. [...] You know, people who have the heart in the community, who were brought up in the community and who care about the community... and because they care they see that for this community to thrive in the long run, they need to look beyond... and to understand that they are like in a spider's web... if they do one thing, it starts wobbling down and the other way around. So, to me, it's the best of the local citizen, with a view to the world. (T/U-8)

The last part of Ulrich's definition appeared in all four participants' answers, mostly when it came to enumerating the components of the knowledge dimension of global competence. All of them stated that a global citizen should be *well-informed* and should have *knowledge about the world*. Being well-informed meant something different to each of the participants, as it entails *knowledge of the local culture* to Zsigmond (T/Zs-6), *knowledge of other cultures* to Ulrich (T/U-9), *being up-to-date* to Adél (T/A-7) and *some encyclopaedic knowledge* (e.g. knowledge about 20<sup>th</sup> century history, literature, geography, mathematics) to Ilona (T/I-6) and Adél (T/A-7).

When asked about the skills needed for being globally competent, most of them apologised for repeating themselves, as the skills they listed corresponded to the ones they mentioned for succeeding in the 21<sup>st</sup> century. As for attitudes, they mentioned the same ones as in the previous case, for 21<sup>st</sup> century competences, e.g. empathy and openness, completing the list with *tolerance*, *flexibility*, *sociability*, *caring about the community*, and *thinking big*.

The participating tutors may thus claim to have a reasonable understanding of the components of global competence, but they failed to mention some important elements of the three dimensions. When it comes to the knowledge dimension, the PISA framework includes the knowledge of global, local and intercultural issues, which were not specifically mentioned by the participants. According to PISA (2017), the skills to understand the world and take action include reasoning, efficient and respectful communication, perspective taking, conflict management and resolution and adaptability, which were all mentioned in the participants' answers. The participants mentioned the attitudes listed by PISA as well, emphasising openness and respect for people from different cultural backgrounds, but only one of them mentioned global-mindedness, or being a "citizen of the world with commitment and obligation toward the planet and others, irrespective of their particular or national background" (PISA, 2017, p.17).

#### 4.1.3 Global competence development in university tutors' lessons

In order to explore what tutors really meant by global competence development, they were asked what opportunities their students have in their lessons to develop the above-mentioned knowledge, skills and attitudes. All the tutors said that they do bring global, local and intercultural issues into class to discuss, and they also deal with current issues. Even though they deliberately bring in different topics, issues generally crop up and when they do, the tutors usually address them. However, they do not include these topics systematically and the aim of developing students' global competence is not emphasised.

As they mentioned, it is more important to create the necessary conditions than to push students in this direction. As Ulrich put it,

I think the ability to think critically, to engage with texts, I create a sort of ground for this in various ways... to what extent they take up on that, I don't know, it's hard for me to tell. [...] It's more like a flowerbed. I throw in a couple of seeds and I try to create an atmosphere which is conducive to grow[ing] this kind of stuff. And how big the plants are I can't tell. (T/U-11)

Two tutors, Adél and Ulrich also pointed out that the fact that students can choose their own topics to bring in for discussion can also contribute to GCD. They both have news circle activities, where students have to talk about a news item they have read for the lesson, share their reflections on them and comment on each other's news items. With this activity, they try to "force students to read" (T/U-11) and make them take a stand, "state their opinion" and "react to anything" (T/A-9). The other tutors also find it important to make their students take a stand in connection with anything. According to Zsigmond,

we have to force these things in order to make them take a stand. If possible, we have to make it compulsory for them to look up things, so that they cannot get out of answering questions by saying "I don't know". (T/Zs-7)

Ilona expressed her concerns about her students' apathy and lack of interest and added that sometimes when she addresses an issue in class, she would be happy if at least "one out of 15 students did some further research in the topic" (T/I-7).

To sum up, giving students the opportunity to research certain topics was the most common answer among the four tutors, which they include in their lessons and outside the lessons to make students more interested in some issues and to make them take a stand.

## **4.2 How do teachers view their role in developing students' GCD?**

### **4.2.1 Whose responsibility is it to develop students' global competence?**

All four tutors shared the view that "educating students who are in [their] care" is part of being a teacher (T/I-8). Acknowledging that mostly language teachers take on this task as it is more easily done in language classes, the participating tutors stated that developing students' global competence should be every teacher's responsibility – no matter what their subject is. However, there seemed to be a consensus that it is not only teachers' responsibility to develop students' global competence. Ulrich and Ilona emphasised the students' own responsibility in developing their global competence. According to Ilona, students "should have an inner need" (T/I-3) to develop and to become more knowledgeable about the world. As Ulrich put it, teachers can only create the right conditions and guide the students but cannot develop anyone, "it is [the students'] task ultimately" (T/U-12).

The tutors also mentioned two other factors that need to be taken into consideration: the family's and the peers' role. According to Zsigmond, "the students' family plays a key role" (T/Zs-7) in nurturing them to become global citizens, as if it is the norm in the family, it will be an important aspect in their education. As Adél put it, "even though [her students] are over 18 and they have moved out of home, whatever they have brought from home is determining and is going to be a determining factor as they become adults" (T/A-10). Ilona and Ulrich emphasised the role of the peers,

as they think that through discussions, students can effectively develop each other's global competence.

#### 4.2.2 Language teacher or educator?

The tutors were also asked whether they consider themselves as English language teachers or educators. All of them chose the latter. Ilona, who also teaches in a secondary school, said that she "cannot shake off this role" (T/I-4) and university students also need to be *educated*. As she said, she sometimes educates students by intervening in situations when they disturb each other but she also educates by bringing in certain issues to discuss and therefore by forming opinions. Adél views her role similarly, as she puts it,

I don't just want to teach them the language, but I'd like to encourage them to think, to form opinions and to be more open-minded... not just to say what they think but also to be more open to different points of view and different opinions. (T/A-6)

The determination seemed to be less pronounced in Zsigmond's answer to this question:

Well yes [I do feel like an educator], but well... how to [put it, not with a sense of vocation and it was never a religious mission, I've never had that, not even when I was teaching in a high school. But as I was there, I felt that maybe I should... a little bit... but not forcefully... Maybe that's how everyone feels, the difference lies in how forcefully they do it. Whether they force their own opinion on the students. [...] I would like my students – even if it's not that fashionable to say nowadays – to see the world in a more liberal way. (T/Zs-4)

Just as it was pointed out by Brown (in Section 2.2), Zsigmond also mentioned that it is very difficult to see that fine line that should not be crossed when talking about controversial issues and when presenting one's opinion so that it does not become indoctrination.

Even though the question was about how they see their role in educating young adults, and whether they consider themselves to be simply their language teachers or their educators, like Zsigmond, Ulrich also addressed the political dimension of education:

There is no such thing as value-free education. I think there are certain values and people may not share them... but it's what discourse analysts and conversation analysts say... you cannot not communicate. And I say that you cannot not educate. Either through its absence... Because of that, I choose to be fully fronted educational, but it doesn't mean lecturing or... but I have views and [these young people are] still very malleable, who are looking for something... they are trying to figure out their identity, they are trying to make key decisions in their lives, they will be the next generation... and so... I have a role. So, I'm absolutely, unapologetically educational. (T/U-6)

After expressing his strong beliefs about his role, Ulrich also pointed it out that unfortunately there are some teachers in the institution who completely reject the role of educators and regard themselves solely as language instructors or depending on their subject, as academics.

In sum, all the participants see themselves as language teaching educators, and to varying degrees feel that they have a role in fostering their students' global competence.

#### 4.2.3 Being a globally aware teacher

The participants were also asked to draw up the profile of a globally aware teacher. First, they mentioned characteristics of global citizens, such as tolerance, empathy, and being critical, but when asked about how it can be seen in the classroom, they gave more detailed answers. They agreed that the fact that someone is a globally aware teacher is manifested in the atmosphere they create. Ilona and Adél also commented that it all boils down to how the teacher reacts to certain moments and how they relate to their students. As Ilona put it, if she is globally aware, she needs to “stay authentic... so that everything [she] say[s] and do[es] should be in accordance with what [she] would like to represent” (T/I-7). As Adél worded it, “somehow you can just feel it... the atmosphere created is the reflection of who the teacher is” (T/A-9). They also seemed to agree that whether someone is a globally aware teacher or not does not necessarily come down to deliberate planning. They believe that if someone is a global citizen and has global awareness, they are going to be globally aware teachers as well, because it is not something they can shake off.

According to Adél, it can also be seen from what kind of topics they discuss in their lessons. However, the way they discuss them also matters. Ulrich commented that it is essential that teachers have a sort of meta-awareness. In his view, they have to be cautious about not becoming preachers, because “nobody likes to be preached at” (T/U-10). He points out that globally aware teachers must have a critical faculty and acknowledge that they do have a power, but they should never misuse this power to force issues. He went on to say that he should teach issues that are important to him only if he really thinks that they would also be useful for his students, but he should not address them to simply “feed [his] own little pet ego or cause” (T/U-10).

All the participants emphasised that the most important thing a globally aware teacher can do for their students is to be a role model for them. Zsigmond does not really believe in skills development in the lesson, but he acknowledged the teacher's role and as he put it, “all it takes is a charismatic teacher” (T/Zs-7) to raise students' awareness to certain issues. Ilona also highlighted the importance of the teacher as a model by saying that if one is a global citizen then it will be present in the way they live and the way they do things in the lessons and through that, the students will get a model to follow.

#### 4.2.4 Global competence development in teacher education

All the tutors agreed that it is essential that this dimension should be present in teacher training and they all considered it extremely important. However, as the participants have been involved in EFL teacher training for different lengths of time and in different ways, they have quite a different perspective of the training offered in the institute.

Adél's case can be considered special, as she graduated from the same institute four years ago, so she has a view of the training both as a former student and a tutor. She believes that GCD is present in the training “in some ways,” as during the English teacher training MA course, tutors aimed to “make students more open”, students “could always state their opinion” and “creativity was embraced in the lessons” (T/A-10). She also added that she might have been lucky, because her teachers loved bringing in global topics to the lessons. However, she admitted that she had heard

that in some other teacher training programmes teachers are “lagging behind and using old techniques” and she concluded by saying that there is “a lot of room for development” in this programme as well (T/A-10).

Zsigmond and Ulrich also agreed that it is present in some ways, but not clearly. Zsigmond said that he could not imagine it being part of the materials in methodology lessons, although it would be important to include this dimension somehow in the programme. Ulrich does not believe that there should be a *global issues* training component either, but he said that this should be more emphasised in the programme. He mentioned that “there is something about it in the lecture series” the department is offering, but there are no elective courses students could take to learn more about it. However, he rounded it up by saying that “a training programme like [theirs] should at least be clear about – particularly as these new competences are being seen as worth measuring – where [they] stand and what it is that [they] can contribute” (T/U-13).

They also agreed on the reasons why they think it is important to involve GCD in the EFL teacher training. Firstly, they think that everybody would need global competence, as “they are all people and they are all touched by these issues” (T/U-11). Secondly, because they agreed that in order to be a globally aware teacher, one needs to become a global citizen first. As Ilona explained, “if [students] get a model, they will become [global citizens] and they will be able to pass it on in an authentic way” (T/I-8). Taking everything into consideration, what became apparent from their answers is that although global competence development is not a clearly stated goal in the teacher training programme, personally they are all doing their best to include global topics in their lessons and to develop their students to become successful 21<sup>st</sup> century citizens.

#### **4.3 Does the interview guide elicit appropriate data to answer RQ1 and its sub-questions?**

Based on the research, it can be claimed that the interview guide yielded sufficient and appropriate data for analysis and even from the four interviews conducted, several themes emerged that were helpful to answer the research questions. However, even though the interview guide was successful in eliciting interesting and meaningful answers from the participants, the findings indicate that some modifications will need to be made in it. These modifications will mostly involve adding more clarification probes to be put to the participants in order to make the interviews more dependable by ensuring that cross-interview comparisons are feasible.

In order to obtain appropriate answers to the question “What are the characteristics of a globally aware teacher?”, there should be a follow-up question asking about how being globally aware is manifested in the lessons, because first, the participants started to talk about the characteristics of global citizens disregarding the fact that the question was about teachers. Also, even though initially the question “Whose responsibility and task do you think it is to develop students’ global competence?” referred to responsibilities in the teacher training programme, the participants went into high school teachers’, parents’ and other students’ responsibilities. So, a possible modification to this question would be “Whose responsibility and task do you think it is to develop students’ global competence at the university?” Moreover, the brainstorming question (*Could you mention some global, local and intercultural issues?*), which was designed to activate the participants’ schemata, proved to be superfluous as participants started to list the global, local, and intercultural issues they deal with in class even if it was clarified that they should not think about what they teach in that part of the interview. Consequently, this question will need to be deleted from

the interview schedule. Finally, instead of asking the question “What knowledge, skills and attitudes do you think university students need to succeed in the 21st century?”, it seems to be more advisable to break it down into specific sub-questions (e.g., *What knowledge do you think students need to succeed in the 21st century?*) in order to make sure participants do not leave out any of the three components.

The above-mentioned problems do not undermine the trustworthiness of the research as the answers received proved to be useful on the whole, but some questions need to be worded more clearly in order to get the type of answer anticipated.

## 5 Conclusion

In this study, on the one hand, the author intended to validate an interview guide designed to inquire into teachers’ views on global competence development. On the other hand, she aimed to reveal how tutors working in EFL teacher training view global competence development and their role in developing students’ global competence. It emerges that the designed instrument is capable of yielding appropriate insights to answer the empirical research questions of the study, so it can be used with some minor modifications in future research on Hungarian secondary school EFL teachers’ and EFL teacher trainers’ views on GCD. Based on the findings, it seems that EFL teacher trainers have a reasonable understanding of global competence, especially the skills and attitudes students need to be globally competent, but they are not entirely sure about what the knowledge component entails. It also becomes apparent from the data that the participants believe that global competence development is important, and that they have an essential role in developing their students’ global competence as educators. Their most important role, in their view, is to bring into the classroom some local, global and intercultural issues to encourage their students to think and state their opinion. Apart from that, they also believe that they need to act as role models as global citizens in order to nurture the future generation of global citizens.

Although it has brought novel results, the research presented here has its limitations. Given the fact that it was a pilot study, it only gained insight into the views of four teacher trainers. In order to get a more detailed picture, further research would be needed involving more tutors. Moreover, the credibility of the study could be increased by triangulation by conducting lesson observations and by involving other perspectives (e.g., the students’ points of view). The *dependability* quality criterion of qualitative studies could be met by following as closely as possible an updated, more detailed interview schedule in order to level out any bias.

As teachers’ views on global competence development had not been explored before in Hungary, the present study filled in an important research gap. Guo (2014) pointed out the importance of the incorporation of the global perspective in initial teacher training in order to achieve that novice teachers become more likely to incorporate it in their lessons. The participants of this small-scale interview study also agree that it would definitely be worthwhile to include GCD more clearly in the EFL teaching programme, because even though it is present in some tutors’ lessons in some ways, there is room for development. Further research could include exploring teacher trainee’s views on GCD and the type of education they get in the same teacher training programme in teaching about local, global and intercultural issues, as it would be interesting to compare their perceptions to those of their tutors. Furthermore, the next step of the author’s research will involve gaining insight into secondary school EFL teachers’ views on GCD and how they compare to EFL teacher trainers’ views in order to draw some conclusions to serve as a basis for pedagogical recommendations.

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## APPENDIX A

### Interview schedule on the views of teacher trainers on global competence development

Dear Colleague,

Thank you for accepting the interview and contributing to my doctoral research. I'm Rita Divéki, a second-year student in the Language Pedagogy PhD Programme at ELTE. My research field is global competence development and the aim of these interviews is exploring teachers' views on global competence development and dealing with global issues in class. There are no right answers, I'm interested in your experiences and your attitudes towards these issues. I'm going to use what you're saying for research purposes. You're going to be assigned a pseudonym during the research project and no third parties will be able to identify you. After the recording, I'm going to transcribe the interview and send it back to you for member checking. If you were interested, I would gladly share the results with you and if you consent to the interview being recorded, we can start.

#### Background questions:

1. How long have you been teaching?
2. Where did you go to university?
3. What subjects do you teach?
4. Where and in which institute?
5. How long have you been teaching here?
6. Have you ever taught or lived abroad?

#### Interview questions:

1. What do you enjoy most in teaching language practice for first-year students?

**When it comes to this course, teachers are quite free as though the syllabus consists of teaching the grammar units of Michael Vince's Advanced Languages Practice book, we're free to choose the topics to discuss in the lesson.**

2. How do you design the course? (*How do you choose the topics?*)
3. What topics do you most enjoy dealing with in class? (*Could you list some please?*)
4. Are there any topics you don't particularly enjoy dealing with in class? (*Could you list some please?*)
5. Are there any taboo topics in your classes? (*Why wouldn't you bring them in class?*)

**The next question is only for brainstorming, so do not think of topics you teach. Could you mention some global, local and intercultural issues?**

6. What global, local and intercultural issues do you usually deal with in class?
7. What global, local and intercultural issues would you never bring into class?
8. How do you feel about dealing with global, local and intercultural issues in class?
9. How often do you deal with such issues in class?
10. How important do you think it is to deal with such issues in class and why?
11. What does it depend on whether you bring in global, local and intercultural issues to deal with in class? (*What influences your decision in bringing in such issues? What do you take into consideration when selecting the topic? What prevents you from bringing in certain issues to class?*)
12. Do you consider yourself to be a language teacher exclusively or more like an educator?
13. What knowledge, skills and attitude do you think university students need to succeed in the 21st century?

**You might have heard about the fact that from 2018 on the OECD PISA has started to measure students' global competence. According to my definition, global competence comprises the knowledge, skills and attitudes which make enable students to succeed in the 21st century labour market and empower them to live as democratic, active, conscious and globally aware citizens. For the latter, the literature uses the term global citizen.**

14. What do you think makes someone a global citizen? (*What knowledge do they have? What attitudes do they have? What skills do they have?*)
15. Do you consider yourself to be a global citizen? (*To what extent do you consider yourself to be a global citizen? What do you do in order to be one? How do you develop yourself in this role?*)
16. What are the characteristics of a globally aware teacher or a global teacher?
17. What opportunities do your students have in your class to develop their above-mentioned knowledge, skills and attitudes?

**Students taking part in the programmes run by the Institute are going to become language teachers and other English-speaking experts (interpreters, translators... etc.)**

18. Do you think it is important to deal with global competence development in this context? Why?
19. Whose responsibility and task do you think it is to develop their global competence?
20. To what extent do you think it is important to involve global competence development in EFL teacher training?

**Thank you for the interview. Should you want to say anything else in connection with the topic, you're welcome.**

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# **RESISTANT-DISCOURSE-BASED PEDAGOGIES: IMPLICATIONS FOR SOUTH AMERICAN TEACHERS' PROFESSIONAL DEVELOPMENT**

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## **Abstract**

Discourses of resistance have emerged in South America as an alternative to challenge the monolingual, hegemonic, and hierarchical structures to construct knowledge. As a result, new pedagogies have been developed following the resistance-inspired perspective at the educational level. Although challenges that teachers from different communities face have been widely documented, research also indicates that teachers' professional development (TPD) programs oriented by discourses of resistance, deserve deeper scrutiny. This paper aims, first, at synthesizing the extant literature to develop an evidence-based framework of resistant TPD and, second, at analyzing the possible implications of this resistant-discourse in the educational settings of South America. Data was collected through a systematic online literature review process of the major South American peer-reviewed journals published between 2000 and 2018, and was evaluated using content and interpretative analysis. Results suggest that although pedagogies driven by discourses of resistance promote teachers' empowerment, they also lean towards diminishing teachers' voices and professional growth.

## **1 Introduction**

South American teacher education is characterized by vastness and complexity due to the uniqueness of the various communities and populations that interact in this ample territory through different languages and dialects. However, education in South America has been framed on the coexistence of different languages and cultures in the same territory; yet, the educational models do not seem to be balanced, as some structures enjoy a privileged position over others due to the fact that they are grounded on *monolingual*, *hegemonic*, and *hierarchical* approaches of teaching and learning (Estacio & Camargo, 2018).

Consequently, the widely applied model has established vertical relationships between participants, has restrained linguistic and cultural practices to standardized and colonial canons, and it has confined culture to essentialist perspectives that scarcely recognize the influence of ideology and the marginalization of non-Western cultural realities (Holliday, 2011). In this context, having a standardized model of education rooted in economic, political, and cultural issues has not only had implications in the linguistic field (Estacio, 2017), but also, on a purposeful and monolithic vision of culture (Nuñez-Pardo, 2018), and on teachers' professional development (hereafter TPD).

Thus, South American studies have shown that a linear view of pedagogical methodologies has taken root, disregarding the individual experiences and realities of the population in which educational processes are conducted (Estacio & Camargo, 2018). Moreover, TPD research has mostly reported on proposals for improving institutional practices and has described experiences in treating specific problems of professional training events, typically from the perspective of only one department or language program director (Allen & Negueruela-Azarola, 2010).

As a response to widespread conventional approaches, discourses of resistance have emerged in South America aiming at challenging the taken-for-granted structures by regaining and valuing ethnic, linguistic, and cultural identities with a view to reducing inequalities. Though several TPD programs advocating teachers' reflective praxis and their voices within curriculum and material design have followed the resistance-inspired perspective, it seems necessary to dig deeper into the concept of resistance within the educational setting and teachers' discourses towards it.

The present study is intended to contribute to the field by synthesizing the extant literature to develop (from the literature) an evidence-based framework for resistance in South American TPD. Conjointly, it strives to gain a deep understanding of resistance-focused TPD developed locally and from the perspective of current South American research and outlook.

## 2 Theoretical background

### 2.1 Definition of key terms

In order to unveil the way *discourses of resistance* have been enacted in South American contexts, it is crucial to conceptualize the terms *discourses of resistance* and *professional development* to establish a common understanding of how those concepts inform the present research.

#### 2.1.1 Discourses of resistance

Discourses, in Gee's (1999) view, can be understood as an amalgamation of human language and non-language; that is, symbols, feelings, thoughts, behaviors, and objects that represent a part of the world and portray different identities, activities, and meanings. As a result, they are developed, transformed, and either legalized or discarded by constantly moving contexts and realities. Given this characteristic, discourses, or *systems of knowledge* as established by Foucault (2005), circle under pre-established circumstances aiming at shaping societies and exercising control through educational systems and policies.

Indeed, language per se, as the vehicle to perpetuate *naturalized discourses* (Fairclough, 2003), has been condemned under the *New Capitalism* to be uniform and unique as the emphasis is on the global economy expansion (Humes, 2000). Consequently, notions such as powerful and powerless countries, native and non-

native speakers or poor and rich cultures have arisen and have impacted on TPD as they serve as foundations for shaping the view of the world and their inhabitants' identities. Considering this, over the years attempts have been made to reconstruct and deconstruct *naturalized* discourses rooted in *hegemonic*, *colonial* and *monolingual* notions by different scholars who address tensions, critiques, and trends in the educational field to redefine understandings and contemplate new alternatives in terms of approaches and methodologies, constituting a *discourse of resistance*.

To analyze this kind of discourse, scholars have mainly used critical discourse analysis as it focuses on the study of power and dominance in relationships within day-to-day social interactions (Fairclough, 2003), from two main aspects: (a) *top-down*, relations of dominance and (b) *bottom-up* relations of resistance. On the one hand, *top down* discourses have been acknowledged as the ones depicted by Western cultures who disseminate their power over other territories using their privileged position in the socio-cultural and economic spheres of society.

On the other hand, *bottom-up* discourses of resistance have emerged since 1980 as a rising trend of radical pedagogical models which study tensions and conflicts that non-favored populations have faced over the years, in order to empower them in the development of educational practices and policies (Singh, 2001). Hence, scholars such as Giroux and McClaren (1986), Hickling-Hudson (1998), Luke and Gore (1992), and Maher and Thompson Tetreault (1997) have united their efforts to analyze these tensions in different spheres such as post-structural pedagogies, feminist pedagogies, pedagogies of hope and pedagogies of whiteness.

Nonetheless, even if scholars have recognized the existence of these two aspects, *top-down* and *bottom-up*, some of them have focused their studies on understanding the top-down discourse as a key element in discourse analysis. Such is the case of van Dijk (1983), who argues that in spite of the necessity of an arising analysis of resistance in a wider theory of power, his approach has, as a core, the elites and their discursive strategies for the maintenance of inequality.

Based on the aforementioned, within the field of critical pedagogies research, advancement has been acknowledged as successful based on the rate of inclusion of new voices in the creation of policies of differences. As a result, a considerable number of pedagogies that are expected to adjust to the membership of education have arisen under the premise of involving all actors so that all voices and differences can be heard and taken into account in the decision-making processes. Thus it becomes relevant for us as teacher-researchers first to create an understanding of the way *bottom-up* resistant discourses are portrayed in the educational field and second, to analyze how these critical pedagogies have been addressed in recent years in South American educational contexts in terms of TPD. With this in mind, different perspectives of TPD are explored.

## 2.1.2 Teachers' professional development

According to Ferrer and Poole (2018), professional development programs (TPD) can emerge due to *intrinsic* or *extrinsic* motivation. The first one reflects teachers' desire to improve their practices and gain individual satisfaction; while the second one responds to the idea of maintaining a position, obtaining a better salary or a promotion. Within the educational field, both motivations seem to be present: the aim of improving oneself by expanding one's knowledge and expertise, and the expectation of being promoted.

As reported by Camargo (2018), TPD has mostly dealt with the concept of training teachers under the *Transmission Model*, which focused its efforts on providing educators with formal education programs about methodologies, materials and didactics that have been copied and applied in different countries regardless of the

actors' needs and backgrounds. Under this model, teachers' voices and needs are not heard, and rigorous *social truths* transmitted through the curriculum (Abrahams & Farias, 2010) and *hegemonic* and *colonial* discourses are spread (Estacio & Camargo, 2018).

Because of this, both teachers and scholars have expressed the need to conceive TPD as a process aiming at assessing and re-exploring educational approaches, methodologies and perspectives, and the way these are carried through in local contexts and realities (Camargo, 2018). Olaya (2018) states that by embracing TPD from a reflective and critical perspective, both teachers and students are empowered and are able to underline the importance of coping with constraints such as time, resources, and the social situation present in many educational contexts. Likewise, Questa-Tortero, Rodríguez-Gómez and Meneses (2018) reported that the importance of collaboration among teachers goes beyond the ideal of transforming and designing a society that is in constant change, but means developing an organizational culture of collaborative work that allows them to interact and propose initiatives to guarantee quality in the educational system.

With respect to this matter, Evans (2002) identified both *attitudinal* and *functional development* as key elements of TPD and states that the former, as its name implies, "is concerned with the process through which teachers modify their attitudes towards their profession while the second one deals with the process through which teachers' professional work may be improved" (p.251). In this sense, it can be argued that the need to renew pedagogical practices is a response grounded not merely in the professional sphere, but on both personal and communal claims.

Considering the above, the purpose of TPD, in a collaborative and reflective model, is to enact pedagogical strategies that effectively meet the needs of the institutions, programs, teachers, students, keeping in mind their contexts. To do so, researchers have focused on (a) intercultural-language variations and the use of L1; (b) curriculum renewal-linked professional development programs, (c) peer coaching.

### 3 Methods

The present study is part of a two-year investigation about resistance in South American teacher education. This paper focuses on resistant-discourse based TPD and it follows a theoretical-reflective research approach with a view to proposing a framework informed by current research in the field. The study started with a review of TPD resistant literature in order to establish common understandings of resistance in TPD and to identify key elements and/or features of resistant-based pedagogies.

#### 3.1 The corpus

The systematic review process included an online literature search of major databases (Google académico, Eureka, SAGE, Science Direct and Taylor & Francis) and journals on language teaching and applied linguistics in eleven countries of South America (Appendix A) (Argentina, Bolivia, Brazil, Colombia, Chile, Ecuador, Guyana, Paraguay, Peru, Uruguay and Venezuela) with the following criteria:

- Keywords, and/or title and/or abstract including 'professional development', 'resistance' or 'resistant discourse' and 'discourses of resistance'
- Focusing on resistance of practicing and pre-service teachers in South America
- Year of publication between 2000 and 2018
- Peer reviewed journal articles and chapters from edited books

A set of 130 texts resulted from the online literature search; the texts comprised 25 book chapters and 85 peer-reviewed journal articles. Texts were organized in an Excel file and classified according to their country.

### 3.2 Data analysis

With the intention of understanding the possible implications of resistant-discourse based pedagogies on South American teachers' professional development, three main rounds of data analysis were conducted with the dataset. The first round focused on content analysis. A careful examination of the abstracts was conducted by the three researchers, who worked independently examining at least four countries each. Criterion Sampling (Patton, 2002) was used as the researchers concentrated on the aim of the paper, the methodology, the participants and the data sources in order to examine their relevance and compatibility with the research topic. The initial examination enabled us to keep 36 texts, which were organized in an Excel file and classified according to their country. Then, general themes among the corresponding countries were established and socialized during a debriefing session, which according to Davis (1995), allows researchers to share and examine information in order to identify commonalities. By doing this, it was possible to agree on a list of elements that were common across countries (see Appendix B).

With these elements in mind, a second round of analysis was conducted. This phase aimed at examining the body of these texts through the discourse tradition of *Qualitative Content Analysis*, which explores the relationships among the concepts found in a text (Schreier, 2012), allowing researchers to go beyond the purpose of merely describing and interpreting sequential patterns within discourses, and to analyze these discourses within a context (Patton, 2002). In order to identify different understandings and key elements of resistance in South American TPD programs, the authors were able to define the list of elements emerging from the first round of analysis, and look at data using the color-coding scheme. The elements were then quantified and grouped according to the density each one had so as to be able to understand and visualize the relationships among them (See appendix B).

After this, it was relevant to problematize and examine in depth the emerging features in the second round; thus a third round of analysis was conducted using critical discourse analysis (Fairclough, 1994, 2003) procedures. The three researchers worked together and were able to establish complex relations among concepts that were apparently unlinked and after a process of sorting and grouping understandings of resistant-discoursed based pedagogies, two main categories emerged: (1) Including bottom-up realities, (2) Promoting over-and-above collaboration and reflective practice.

## 4 Results and discussion

The results that are presented in this section have emerged from the analysis of different TPD programs developed in South America; thus, they are the accounts of local experiences in teacher training and education. Since this study is not fuelled by concerns of generalization, the findings should be examined with caution; they are partial and non-exhaustive, as it is difficult to provide a complete picture of the whole vast extension of the South American context. In this paper, the authors have translated all quotations from French, Portuguese and Spanish into English; due to limitations of space only the English versions are provided. As mentioned above, the analysis of the collected data resulted in two main categories: (1) including bottom-up realities and (2) promoting over-and-above collaboration and reflective practice.

#### 4.1 Including bottom-up realities

This category describes how South American resistant TPD programs found their roots in the need to build their own schools, '*escuelas propias*', such as schools for indigenous people or minority groups. The aforementioned necessity is grounded on *bottom-up* discourses, which lead to a careful examination of contexts and realities in order to build up educational proposals with particular methodologies that respond to the circumstances of the setting.

As examples, Jaramillo and Carreon (2014), in their analysis of the pedagogy of living well (*bienvivir*) in Latin America, emphasized how this multi-layered approach recognizes and addresses the entanglement of social realities as well as visions, values and traditions of communities to shape its aims. Additionally, García-Carrión, Gómez, Molina and Ionescu's (2017) seminal work across schools in Colombia, Peru and Brazil, indicates that their TPD programs based on Learning Communities accounted for "the needs and realities of each school and community to ultimately improve [teachers and] students' learning and development" (p.54). Another example is the Ecuadorian university program for indigenous people (Intercultural Bilingual Education), which was designed to assure the continuity of community languages, knowledge systems and values as well as the final goal of a liberating educational process (Villagómez, 2018).

In order to give value, different South American authors such as Freire (2001), Rodríguez (2008), and Villagómez (2018) have focused their studies on the empowerment of South American educators and students, as they are placed as the key actors of education processes all over the continent. Likewise, Santos (2007) has shared an optimistic view in which globalization allows emergent discourses and actors from underdeveloped countries to take their places and participate in a human change, in which not only knowledge is valued but the human being itself as an essential part of society. Thus, to grasp how human change can be possible, it is imperative to analyze on-site realities as proposed by Paraquett (2009). She states that learning a foreign language is a process that requires an awareness of one's own context; then, when students know themselves, their own culture and idiosyncrasies, they can understand what a foreign speaker and culture is like.

Similarly, the inclusion of *bottom-up* realities has also facilitated the revitalization of ethnic, cultural and linguistic sources; promoting the deliverance of cultural identities and traditions of diverse populations. For instance, the model of the Bolivian Indigenous University Guaraní and of the Lowlands Peoples "Apiaguaki Tüpa" (UNIBOL) constructs their 'own education' aiming at conducting research and creating science and theory using various indigenous languages. Students at UNIBOL are encouraged to elaborate and theorize from their own linguistic code, for their own purposes and through their own voices (Delgadillo, 2018).

This finding is not only in line with Barrett, Byram, Lázár, Mompoin-Gaillard and Philippou's (2014) ideas about the important role that language plays in constructing cultural agency, but it also brings into focus the possibilities favored by the inclusion of *bottom-up* realities by giving student-teachers a voice. This voice is a non-conventional one (Kramsch & Lam, 1999) that is connected to personal purposes and is not governed by subordination and powerlessness regarding their native culture. Rather, it offers "the opportunity for personal meanings, pleasure and power [...]. [student-teachers] construct their personal meanings at the boundaries [of] their own everyday life" (Kramsch, 1993, p.238).

Indeed, in-context educational discourses have emerged not only with teachers and students as the main actors, but have also influenced educational policies. That is the case of the Brazilian documents *Lei de Diretrizes [Law of Guidelines and Bases]* (1996) and the *[Parâmetros curriculares nacionais] [National curricular parameters]*

(2006), which “suggest action and ideologies according to the Brazilian local context and define their pedagogical practices” (Paraquett, 2009, p.2). This shows that local actions, such as the ones carried out by students and educators, can have large scale results and change the status quo of a traditional society.

In this sense, TPD programs that include bottom-up realities do not merely observe contextual factors and address diversity in isolation; most importantly, they tend to adopt them as a field of research and a target for knowledge construction. This has allowed TPD to be endowed with additional specificity and meaningfulness that are often absent from regular teacher educational approaches. According to Villagómez (2018), resistant pedagogies not only embrace the analysis of realities as problematic fields and targets of knowledge, but also serve as measures to delimit observations and interventions

Although careful reading of contextual aspects, surroundings and frames of reference is a *sine qua non* to offer alternative pedagogies as previously displayed, it equally conveys ideas of distinctiveness and otherness. Based on principles of pedagogical sovereignty (Vergara, 2011), resistance-focused pedagogies have also perpetuated the hierarchical schema inherited from the colonial model (Weinberg, 1995) by insisting on the differentiation between ‘own pedagogies’ and Hispanic ones. On this account, including bottom-up realities can be said to disguise or hide *hegemonic* and *colonial* discourses.

On the one hand, it is essential to point out that in addition to enforced differentiation, partial and unbalanced revalorization also arose in resistant TPD. Indeed, the recognition of excluded populations is at the core of resistance-discourse based pedagogies, but the latter hardly include historicity and holistic perspectives, with the result that communities are still presented in fragmented, simplistic and unconnected fashions. In fact, linguistic perceptions of citizens who live in places where different languages converge are clear examples of a fragmented perspective in which the resistant-focused discourses seem to be overshadowed by the ideas of distinctiveness created by colonial discourses. Such is the case of a study reported by Rojas Molina (2008), who highlighted the linguistic situation of a border area located in the edges of Brazil, Colombia and Peru, where the inhabitants do not recognize their vernacular linguistic varieties as socially accepted, but instead privilege the standard varieties of Spanish and Portuguese spoken in the capital cities of these countries as the model to be followed.

Although the first questions of the interview generated low levels of recognition of local speaking varieties, through further inquiry and observation, all interviewed participants showed high levels of awareness and recognition of their local varieties; however, this recognition is revealed through a continuous comparison and stigmatization between their local variety (vernacular area) and the varieties used in the main cities (Rio de Janeiro, São Paulo, Bogotá and Lima), which still enjoy higher social and linguistic prestige in their area. (Rojas Molina, 2008, pp.260–261) [authors’ translation from Spanish]

Thus, despite the fact that this situation shows that resistant discourses have emerged and empowered speakers of vernacular varieties of language to use those varieties freely and recognize them as part of their cultural wealth, they still position the standardized linguistic forms at a superior level, and their own variety is stigmatized and marks the speakers’ otherness as a colonial discourse perpetuated by colonized citizens. Thus, it is evident not only that colonialism is perpetuated by powerful countries, but also that colonized citizens enrich those discourses when they disregard their own local varieties.

Following the same trend of thought, Chinellato Díaz (2016) explains a similar phenomenon in a border area located in the Venezuelan and Brazilian territories where its inhabitants use a vernacular linguistic variety called *Portuñol*, which is a mixture of Spanish and Portuguese linguistic structures and is used mainly to carry out business between the dwellers of this border area. In his article, he gave an example of linguistic distinctiveness created by a resistant-based discourse, taking into consideration that Venezuelan citizens label the Portuguese language as the prestigious one when it is compared with their own language.

A glance at the linguistic attitudes of the Venezuelan border area citizens regarding the Portuguese language, shows that there still exists a favorable tendency towards the Brazilians' language, which is expressed through opinions that position the Portuguese language, on a cognitive level as a "necessary" and "important" language; and on the affective level as a "beautiful" and "pleasurable" language. (Chillenato, 2016, p.221) [authors' translation from Spanish]

Hence, resistant-based discourses have made Venezuelan citizens aware of the importance of using both languages as a translanguaging representation in which these languages play an important role in the interaction of the citizens of that border area. However, this discourse is overshadowed by the linguistic attitudes of Venezuelan citizens, in which their own language is underrated and under-positioned; this is a clear example of how colonial discourses are still implicit but concealed in resilient discourses.

To sum up, in this category the inclusion of bottom-up realities has emerged from the necessity to recognize contexts and contents as appropriate for specific instructional settings and as a way to verbalize painful experiences with the dominant authorities. As a result, resistant TPD programs have advocated for empowerment and revitalization of ethnic, cultural and linguistic resources as well for alternative voices for minority groups. However, recognition of particularities has also insisted on differentiation, otherness and segmentation of populations; and even though fragmentation may represent a solution to the controversy of social representativeness; cultural complexity and broader rationalities should not be disregarded; nor should the intrinsic tension produced by historical epistemological racism (González, 2011) and intelligence inequalities (Delgadillo, 2018). The following category has also developed in this context of tension.

#### **4.2 Promoting over-and-above collaboration and reflective practice**

This second category includes TPD programs driven by principles of diversity, multiculturalism, and multilingualism, which seem to support linguistic coexistence and collaboration among plural groups. This is the case of the Guyanese initiative called *mother tongue participant* (ILM-Intervenants en Langue Maternelle), formerly *bilingual cultural mediators* (MCB-Mediateurs Culturels Bilingues). Their main goal is to support the transfer of competences between languages as well as to open a full-fledged place for every single Guyanese language in the region (Launey & Lescure, 2017).

In addition to collaborative linguistic coexistence, elements in this category designate the pedagogical practices and actions taken not only to apparently resist *hegemonic* and *colonial* discourses, but also to be empowered and engaged in critical praxis (González, 2007). Hence, their goal is to facilitate encounters between various people belonging to different communities as well as people who have different education, to embrace their professional and linguistic background while validating their knowledge and expertise. As for instance, in a K-12 school in Colombia involving both EFL and content-area teachers:

[...] it was displayed that teachers resisted somehow these discourses by being involved in a community of teachers as they were encouraged to reflect, question, and vision new alternatives for bilingual education withstanding of learners, teachers, and school' needs. By doing so, they made decisions, contributed, and assumed responsibilities through dialogue and peer coaching; tools that served as an opportunity for de-privatizing their pedagogical practices while supporting the group's individual and collective professional development. (Camargo, 2017, pp.106-107)

On top of this, it was revealed that when professional expertise and knowledge among peers were endorsed, positive feelings such as trust, self-confidence and willingness were fostered, having a direct impact on the teacher's personal and professional identities and naturally, on their pedagogical practices. Even though the examination of teacher identity is beyond the scope of the present paper, resistant TPD calls on various memberships and affiliations that many teachers never realized they had. Consequently, professional identity may be problematic, since it can either be dysfunctional or not actively considered at all by the setting (Servage, 2009). In other words, professional identity may be fraught with diffuse, implicit and unexamined assumptions that offer, "few opportunities to openly express, test, and refine beliefs and practices" (Servage, 2009, p.153). The following excerpt taken from a Brazilian context reveals the issue previously discussed:

Interestingly, the majority of the student teachers agreed that their different backgrounds, especially their diverse teaching experiences, were an enriching component that allowed them to function complementarily. Because of this diversity, they were able to supplement each other in their weaknesses. (Vacilotto & Cummings, 2007, p.156)

Bearing this in mind, it can be asserted that further collaborative structures seem to encourage the disclosure of personal opinions and convictions with a view to looking at them afresh through reflective practice. This requires a process of observation, analysis, and collection of further evidence about various aspects pertaining to individuals per se, in order to allow for a more critical perspective and facilitate teachers' understanding about their roles and pedagogical practices (Richards & Farrell, 2005). The following excerpt from a resistant TPD program exemplifies this issue:

Constructing collective knowledge relies upon the strengthening of class-consciousness that reinforces the class character of social actors [...]. But in *buenvivir*, critique is accompanied by a radical questioning outside of developmentalist paradigms. [...] Constructing collective knowledge through dialogue strengthens political identities and sets forward a liberating practice based upon the rubric of living well as opposed to living better at the expense of others and nature. (Jaramillo & Carreon, 2014, p.398)

This finding reveals the heavy expectations that collaborative and reflective practice may bring to the process of teacher training. Although enrichment informed by reflection seems to be a valid improvement motivated by resistant TPD, it has also encapsulated teacher training within an unaccomplished and 'in-renovation' structure. In other words, resistant pedagogies have also been considered as emergent and uncompleted products that always require further reflection and development as their effectiveness is being measured with standardized and often foreign-constructed tests taken by the learners. That is, they are expected to have

immediate effects on the learner's learning process, as reported in Majerowicz and Montero's (2018) study of a large-scale national teacher coaching program in Peru:

We find that this kind of program, which provides continuous support to teachers over the entire school year focusing on practical classroom skills, has large, positive effects of between 0.24 and 0.34 SD on student learning outcomes measured in standardized test scores. Moreover, we find that all students along the test score distribution are benefiting from the program. (Majerowicz & Montero, 2018, p.30)

Bearing this in mind, what may be problematic here is, first, the minimization of populations through perpetual recreation and the 'under construction' label allocated to non-Western rationalities and, second, the limited acknowledgment given to TPD programs carried out in South America based on the constant comparison between western and non-western concepts of the world and societal development. The text cited below helps better illustrate this issue:

In some cases, teacher training is dismissed for the purposes of educational policies reforms. [...] It is necessary to promote teacher training as a core aspect of education but teachers' own expertise and praxis should not be disregarded. [...] Teachers' professional development is more than simple training, it is the product of pedagogical development, experience, knowledge, and a deep understanding of individual emotions and feelings of teachers as influential agents of educational processes. (Aguavil & Andino, 2019, p.85) [authors' translation from Spanish]

Supplementary to the aspects presented above, it has to be noted that *colonial* discourses with regard to knowledge construction are perpetrated by colonized citizens, meaning that TPD programs in most, if not all South American countries take the form of *peer coaching programs* where different educators reflect, interchange, and re-examine their practices (Rodríguez, 2008; Abad 2013; Alliaud & Vezub, 2014; García-Carrión et al., 2017; Questa-Tortero et al., 2018). *Coaching* is understood mainly as a transfer process where an expert teacher (in terms of age, studies, experience) and a novice revise methodologies and approaches to a specific subject. Consequently, the idea of legitimizing knowledge still depends on vertical relations:

The newly qualified teacher (NQT) and the novice teacher both require someone to advise and support them [...] someone with whom to engage in the ongoing reflective discussion about the teaching-learning process. Novice teachers need a mentor teacher, who knows how to support, guide and supervise them [...] similarly; NQTs need a friendly knowing hand that will provide them with awareness, support, and company. This accompanying figure is the mentor. [...] The [...] 'wise counselor', guide, and adviser to younger or newer colleagues. (Abrahams & Farias, 2010, pp.114-115)

From the previous citation, it is possible to assert that relationships such as expert-novice, mentor-mentee, counsellor-counselled are established from the very beginning. Even though reflective and collaborative practice is promoted, this practice might disregard trainees' background, previous knowledge and experience. In addition, it hardly facilitates partnership where mutual relationships between equals take shape and where each participant contributes and learns from the other. Thus resistant-discourse based pedagogies, as elaborated in this category, are heavily grounded on an inequality axiom though they are based on reflective and collaborative practice.

This is due to the fact that there are obvious inequalities among languages and communities as well as unbalanced relationships between participants.

In addition, it is important to note that the inequality axiom of South American resistant pedagogies has been favored by a historical context of tension. In fact, these initiatives were born between subjugation and liberation, negation and valorization, exclusion and integration, and between autonomy and dependency. Those latent tensions are deeply rooted in feelings of ethnic and linguistic shame that ultimately play a central role in the establishment of collaborative relations. Consequently, positive aims connected to collaboration are in contrast with the prevalent sense of ethnic shame and linguistic self-devaluation inherited over generations and thus, they enable us to uncover the remarkable influence of painful colonial violence and segregation throughout history in the promotion of collaborative structures. The following excerpt supports this statement:

It is too early to predict the outcomes of the national bilingualism program set by the MEN, but it is worrisome to see how this project is repeating the same patterns of inequality, discrimination, marginalization, and segregation that were used to impose Spanish more than five hundred years ago. It is easy today to associate indigenous peoples and most Afro-Colombians with poverty and backwardness and to blame them for that, but if we look closer and carefully, we can see that the causes of their disadvantaged situation have profound roots embedded in our history and in an ideology of superiority vs. inferiority. (Guerrero, 2009, p.21)

Summing up, the continuous collaborative and reflective process, supported by resistant-discourse based pedagogies, suggests the need to apprehend and validate linguistic and cultural encounters, in order to provide for educators an opportunity to rethink, acknowledge and legitimize the use of the many languages spoken in South American territories. Nonetheless, it also conveys ideas of emergent and uncompleted pedagogies, which result in the minimization of populations and the perpetuation of vertical relationships deeply grounded in an axiom of inequality prompted by a historical context of tension and segregation.

## 5 Conclusions

In an attempt to summarize the results of this study, it is important to highlight that our main purpose was to depict and understand the *discourses of resistance* that have emerged in South America within a professional development context so as to obtain a general overview of the current state of this educational field and the way it has been spread in this territory over the last decades. Taking into account the categories previously discussed, it can be asserted that the discourses addressed here deal with the notions of both the *bottom-up* and *top-down* aspects (Fairclough, 1994), which produce a complex network of intertwined routes leading in many different directions.

At the outset, the bottom-up realities are said to be grounded in painful experiences and rooted in the desire to be recognized and valued as a legitimate context where different linguistic, socio-cultural, and ethnic realities converge. In this way, the population becomes empowered and minority groups' voices get to be heard. However, these bottom-up realities also implicitly perpetuate colonial ideas of differentiation and otherness because history is left aside and people go on being divided, leading to a fragmentation that still exists. In addition, it was evidenced that colonized citizens help in the perpetuation of colonial discourses (e.g., stratification of linguistic forms, inherent feelings of shame and inferiority).

Alternatively, the top-down discourses of resistance in TPD that have arisen in the diverse communities in South America are based on plurilingual and multicultural principles and plead for collaboration and critical reflection. This has favored encounters between people and has allowed teachers' identities to be revealed when observing, analyzing, and revising mutual pedagogical practices and approaches. Nevertheless, it was also noted that the notion of collaboration is based on an inequality axiom promoted by a historical context of tension and segregation. Besides, these pedagogies are labeled as emergent or unfinished because of two factors: (a) minimization of populations and (b) establishment of external canons and western realities as the only existing ones.

Finally, it was found that the resistant-discourse-based pedagogies studied here are also fuelled by movements that aim to defy hegemonic and homogeneous structures. For this reason the content of TPD programs should be problematized because they are often unconsciously associated with a certain set of long established - and in some cases mandated - ideas that reinforce limited visions of teachers, schools and classrooms. Mainstream TPD should be committed to a critical consideration of teacher education in order to continue to address the important challenge of endowing TPD with critical approaches that allow teachers to examine issues from multiple perspectives, to de-centre from personal orientations and recognize TPD as dynamic sites where previous knowledge, praxis and ideologies correlate.

## **6. Pedagogical implications and suggestions for further research**

Based on the characteristics and understandings of resistant TPD presented above, the findings presented here not only helped us to clarify meanings about resistant discourses applied to TPD but also enabled us to create awareness about some issues that have been overlooked in the Latin American context.

To start with, the findings of this study provide evidence that the content of resistant-discourse based TPD is centered on cultural and linguistic identities as well as contextual characteristics responding to bottom-up dynamics. Moreover, the inclusion of contextual realities in teacher training in general could be prompted by the need for a deep understanding of a particular community, and even more by the desire to comprehend how individuals from that community conduct themselves, fulfill actions and use socio-cultural knowledge to manage local situations (Arens, 2010). As a result, the "new unit of teaching can no longer be the word, sentence, paragraph, icon or sign, [...] instead our target for teaching and learning needs to be the field of action and agency of an individual within [...] communities" (Arens, 2010, p.322).

In this same vein, including bottom-up realities may be a way to go beyond a mere presentation of minority groups, and cover a wide range of contexts. For instance, the option of giving voice to teachers-in-trainings' home cultures (which are generally absent from instructional materials) is regarded as an opportunity to access particular discourses of personhood and rationalities. Consequently, designers of TPD programs may also want to re-examine instructional content, approaches and assessments to ascertain that objectives in the areas of bottom-up discourses are met.

Although this paper did not aim to identify a definite cause-and-effect relationship between collaborative-reflective practice and resistant TPD, some of the findings give an indication of areas that may be helpful in understanding the role collaboration and reflection can play in teacher education. First, it would be worth favoring flexible and horizontal configurations for participation. Hence, teacher trainees could take their places as legitimate "users and producers of theory in their own right, for their own means and as appropriate for their own instructional contexts" (Johnson, 2006, p.240).

Secondly, more opportunities for collaborative and reflective practice, under the same conditions, are also needed so that teachers-in-training can develop real partnership with others. Furthermore, the results of this study draw attention to the value of extended collaborative and reflective partnerships in teacher training.

Even though bottom-up realities and collaborative-reflective practice seem almost too easy to defend, their inclusion into general teacher education should entail a high degree of planning because this change needs to be modeled, explicitly planned and controlled throughout the process of training. Collaboration and reflection, then, need to be closely monitored and supported by well-defined guidelines, clear goals and above all by well-trained teacher trainers. In this way, the inclusion of bottom-up realities and collaborative-reflective practice in teacher education presupposes not only the planning of activities and syllabi but also the training of the trainers.

Finally, the effects of resistant TPD programs need to be studied further. It would be useful to conduct qualitative studies with teachers to reveal whether and how they apply resistant models and practices in their own classrooms. Therefore, future research on the issue would require formal follow-up in order to provide further evidence for the outcomes presented here. In addition, it would also be useful to record retrospective perceptions of positive and negative aspects of resistant TPDs from the point of view of practicing teachers and learners, in order to substantiate the findings of the current paper.

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## APPENDIX A

### List of South American journals consulted

COUNTRY	JOURNAL
COLOMBIA	<ul style="list-style-type: none"> <li>• Colombian Applied Linguistics</li> <li>• Íkala</li> <li>• Revista de lenguaje y cultura</li> <li>• Matices en lenguas extranjeras</li> <li>• Revista electrónica</li> <li>• Lenguaje</li> <li>• Profile</li> <li>• Folios</li> </ul>
VENEZUELA	<ul style="list-style-type: none"> <li>• Entre lenguas</li> <li>• Lengua y habla</li> <li>• Revista clave</li> <li>• Boletín de Lingüística</li> </ul>
EQUATOR	<ul style="list-style-type: none"> <li>• Chakiñan</li> <li>• Alteridad</li> <li>• Comhumanitas</li> </ul>
PERU	<ul style="list-style-type: none"> <li>• Lexis</li> </ul>
BOLIVIA	<ul style="list-style-type: none"> <li>• Bolivian Studies Journal</li> <li>• Punto Cero</li> <li>• Tinkazos</li> <li>• Página y Signos</li> </ul>
ARGENTINA	<ul style="list-style-type: none"> <li>• AJAL</li> <li>• Anclajes</li> <li>• Nueva Revista de Lenguas extranjeras</li> <li>• Revista Lenguas Vivas</li> <li>• Signo y seña</li> </ul>

CHILI	<ul style="list-style-type: none"> <li>• Revista de lingüística teórica y aplicada</li> <li>• Revista Signos</li> <li>• Onomazein</li> <li>• Literatura y Lingüística</li> <li>• Lenguas Modernas</li> <li>• Estudios Filológicos</li> <li>• Cogency</li> </ul>
URUGUAY	<ul style="list-style-type: none"> <li>• Lingüística</li> <li>• Cuadernos de Investigación Educativa</li> <li>• Revista Humanidades</li> </ul>
BRAZIL	<ul style="list-style-type: none"> <li>• Boletimdo Museu Paraense Emilio</li> <li>• Goeldi:Ciencias Humanas</li> <li>• Calidoscopio</li> <li>• Machado de Assis em Linha</li> <li>• Cadernos de Linguagem e Sociedade -</li> <li>• Papers on Language and Society</li> <li>• Espaco Plural</li> <li>• Revista Brasileira de Linguistica Aplicada</li> <li>• Texto Livre</li> <li>• BELT</li> </ul>
PARAGUAY	<ul style="list-style-type: none"> <li>• Acción, Revista Paraguaya de Reflexión y Diálogo</li> <li>• Suplemento Antropológico: Revista del Centro de Estudios Antropológicos</li> <li>• Revista de estudios paraguayos</li> <li>• Revista paraguaya de sociología</li> <li>• Población y desarrollo</li> <li>• Revista Paraguaya de Educación</li> <li>• Revista Paraguaya de ciencias sociales</li> <li>• Revista Internacional de Investigación en Ciencias Sociales</li> <li>• Revista científica Estudios e investigaciones</li> </ul>
GUYANA	<ul style="list-style-type: none"> <li>• Langue et cité (Bulletin de l'observatoire des pratiques linguistiques)</li> <li>• Repositorio de tesis</li> <li>• Amerindia</li> <li>• Faits de langue</li> <li>• Liste des publications et communications 2017 (sedy)</li> <li>• Africultures</li> <li>• Revue française de linguistique appliquée</li> </ul>

**APPENDIX B****Data reduction (second round of analysis)**

<b>MAIN PATTERNS</b>	<b>COMMONALITIES ACROSS COUNTRIES</b>	<b>DESCRIPTION OR STATEMENT OF MEANING</b>	<b>DENSITY</b>	
<b>Resistance as alternative and differentiated pedagogies</b>	Based on context and particular realities	Reads and takes into account setting and contextual realities	49	
		Adopts context as a field of research and target for knowledge construction	12	
		Aims at invigorating ethnic, cultural and linguistic sources and resources	17	
		Aims at revitalizing cultural identities and traditions	14	
		Recognizes populations in a fragmented, simplistic and unconnected way (no historicity or holistic perspective for cultural complexity)	11	
		Conveys ideas of distinctiveness and otherness (enforce differentiation)	18	
	Unbalanced revitalization of ethnic, cultural and linguistic sources	Colonial discourses perpetrated by colonized citizens	20	
		Perpetuates hierarchical schema inherited from the colonial model (e.g. vertical relations)	70	
		Activist-oriented	Validates resistance within educational settings	0
			Political training of Teachers	15
			Grounded on a painful experience of colonial violence	11
			Influenced by a deep desire to defy the power of the hegemonic and homogeneous state	24

<b>In motion and unfinished pedagogies</b>	Driven by principles of diversity, multiculturalism and multilingualism	Based on encounters among diverse populations	29
		Knowing own culture by recognizing the otherness	0
		Support Linguistics coexistence	30
	Grounded on collaboration and reflective practice	Promotes collaboration among plural groups (it might affect teachers' identity; it fosters positive feelings/emotions such as trust, confidence, etc.).	53
		Requires observation, analysis and collection of further evidence	0
		Promotes reflection on pedagogical practices (to be aware, to change) and it is expected to have an incidence on Ss' learning	39
	Minimization of populations	Minimization of populations on the behalf of perpetual recreation and 'under construction' label allocated to non-Western rationalities.	29
		Unaccomplished and 'in-renovation' structures	1
		Emergent and uncompleted products	8

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# **CULTURAL VALUE ORIENTATION ANALYSIS OF A HUNGARIAN EDUCATIONAL INSTITUTION: A CASE STUDY**

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## **Abstract**

Stemming from personal interest, this exploratory case study (Creswell, 2007) aimed to explore everyday cases of dissatisfaction such as the alleged lack of respect towards teachers, and students' unwillingness to study, or the differing expectations of students, teachers and parents in a state secondary school in Budapest, Hungary. The research was intended (1) to showcase situations where expectations were 'off', and (2) to highlight the possible sources of misunderstandings or problematic forms of behaviour. Thus, it set out to examine whether the complaints of teachers and students could be analyzed in terms of cultural value orientation theory (Hofstede, Hofstede & Minkov, 2010; Trompenaars & Hampden-Turner, 1998; Hall, 1976; Furka, 2013), and if so, which dimensions were detectable. Data collection involved the triangulation of data from questionnaires filled in by students (aged 14-18) and teachers in the same institution, as well as interviews with focus groups and individual teachers. Data analysis applied the constant comparative method of Grounded Theory (Glaser & Strauss, 1967; Creswell, 2007) for the interviews, and general statistical procedures for the questionnaires. Results show that differences in power distance and uncertainty avoidance in the stakeholders' value systems might be responsible for the dissatisfaction. If they are not addressed explicitly, such value differences might lead to a decrease in performance output and job satisfaction, as well as a deteriorating school image.

## **1 Introduction – context and the problem**

I started out in the world of language schools and corporate language teaching in Hungary and obtained some international experience later on. As a language learner I had many native speaker teachers from all around the world, as well as some Canadian relatives to practice with. As a result, I instinctively developed a second identity while learning English and acquired some of its cultural values (Brown, 1986). In addition, as Rogoff (1990) and Nespov (1987) also suggest, I started teaching as I was taught, mimicking a lot of the native teachers' teaching practices and the values behind them (Vygostky, 1980; Rogers, 1983). When I started working in Hungarian state secondary education, I encountered circumstances that I had different reactions to than my colleagues, which forced me to consider the situation. For example, the staffroom was always echoing with how this or that student did not behave respectfully, or failed to do their homework, or kept demanding that their rights be observed whereas they did not fulfill their responsibilities. At the end of the outbursts such general statements were uttered as "this generation is not like ours used to be" or "who do they think they are?"

Reflecting on the recurring staffroom discussions I identified six topics as distinguishable concerns: (1) the alleged discrepancy between education and real-life needs, (2) problems with rote learning, (3) students' lack of skill in manipulating data, (4) students' lack of respect towards teachers, (5) recommended teaching methods and available books not suitable for preparing students for school-leaving exams, and (6) students overburdened with workload, and their complaints considered as "whining". These issues caused constant dissatisfaction in both parties, resulting in mistrust and finger-pointing. The situation became very similar to instances of miscommunication or communication breakdown between interlocutors from different cultural backgrounds (Hofstede, 1980). Therefore, I set out to investigate whether these rifts may be linked to value differences between the stakeholders, and if they can be categorized along the lines of cultural dimensions. The following specific research questions emerged:

1. Could the rift manifested in the complaints from teachers and students in a Hungarian state secondary institution be connected to value differences between the participants?

2. If so, can the value differences behind the rift manifested in the complaints from teachers and students in a Hungarian state secondary institution be linked to cultural dimensions?

## 2 Theoretical background: cultural value orientations framework

In the business world, communication breakdown due to cultural differences has been in the limelight for 40 years, and entire fields of research have developed around the concept. Business management (Hofstede, Hofstede, & Minkov, 2010; Trompenaars & Hampden-Turner, 1998; Jarjabka, 2010), social psychology (Schwartz & Sagiv, 1995; Schwartz, 2006; Inglehart, 2008), intercultural communication studies (Bennett, 1986; Chen & Starosta, 1998), the field of cross-cultural pedagogy (Grobman, 2001; Gay, 2010; Hohman, 2013), second language acquisition (SLA) (Brown, 2000; Tarone & Yule, 1989), and foreign language teaching methodology (Furka, 2013; Holló, 2008, 2014; Lázár, 2006; Barrett et al., 2014; Byram, 1997) all set out to examine the phenomena brought about by differing cultural backgrounds.

Culture is defined as "the behaviours and beliefs characteristic of a particular social, ethnic or age group" ([www.dictionary.com](http://www.dictionary.com)). It can take many forms and shapes. In the educational environment, we might distinguish *classroom culture*, i.e., the collective rules and features that implicitly or explicitly govern activities in the classroom, define educational values, beliefs and processes, such as teacher's instructions, accepted behaviour by students, or attitudes to classroom events (Levin, 2009). In addition, pedagogical literature distinguishes *cultures of learning* where various values and beliefs are attached to learning methods, goals and textbooks, and thus form part of the so-called "hidden curriculum" (Cortazzi & Jin, 1996). *School culture* on the other hand is described by Fullan (2007) as the guiding beliefs and values evident in the way a school operates (as cited in Waldron & McLeskey, 2010, p.2). Finally, the unit of *national culture* comes into the picture, defined as "the collective programming of the mind that distinguishes the members of one group or category of people from others" (Hofstede, Hofstede, & Minkov, 2010, p.6), and is equally important since national culture permeates all organizational culture units, and thus educational systems and schools themselves (Minkov, 2013).

The characteristics of culture can be grouped into dimensions. Furka (2013) provides an overview of the dimensions that scientific literature has worked with both quantitatively and qualitatively, and provides an analytical framework with which cultural value orientations and the problems arising from such variations can be understood. She shows that the 12 dimensions most widely used in research are:

- (1) *low versus high power distance* (LPDI-HPDI), which refers to the extent to which societies or groups accept the fact that power is distributed unequally among members of the society (Hofstede, Hofstede, & Minkov, 2010).
- (2) *collectivist versus individual*, based on the idea that some cultures have stronger ties (COLL) between members of the society than others (IDV) (Hofstede, Hofstede, & Minkov, 2010).
- (3) *feminine versus masculine*, depicting tendencies of the distribution of emotional roles of being caring and more modest (FEM) or assertive and competitive (MAS) (Hofstede, Hofstede, & Minkov, 2010).
- (4) *specific versus diffuse* (SPEC-DIFF), where *specific* cultures compartmentalize the areas of life and engage others to various degrees, whereas in *diffuse* ones the boundaries are less clear (Trompenaars & Woolliams, 2003).
- (5) *achievement versus ascription* (ACH-ASCR), where the former focuses on what one achieves with their actions as opposed to what one is ascribed to or was born into (Trompenaars & Woolliams, 2003).
- (6) *high context and low context* (HCON-LCON) cultures where the latter use explicit codes to convey the mass of information, whereas *high* context-dependent cultures code the message in the physical context, or it is already internalized in the person (Hall, 1966).
- (7) *universalism versus particularism* (UNIV-PART), depending on how far cultures tend to "follow the rules" regardless of the participants or the particular situation (Trompenaars & Hampden-Turner, 1998).
- (8) *neutral versus affective* (NEUTR-AFF), where the former does not show either positive or negative emotions to the outside world (Trompenaars & Woolliams, 2003).
- (9) *inner versus outer direction* (INNER-OUTER), where *inner* orientation means that nature can be dominated and the point of departure for determining correct action is the person. *Outer* orientation means a greater entity that we cannot influence or change controls our lives (Trompenaars & Woolliams, 2003).
- (10) *short or long-term oriented cultures* (STO-LTO), where the former hold past and present values such as national pride, respect for tradition, fulfilling social obligation, and the preservation of "face" (Ting-Toomey & Kurogi, 1998) in high esteem. *Long-term* oriented cultures focus on issues related to the future, such as saving up, persistence and adapting to changing circumstances. (Hofstede, Hofstede, & Minkov, 2010).
- (11) *uncertainty tolerating or avoiding* (low-high UAI) (Hofstede, Hofstede, & Minkov, 2010).
- (12) *monochronic versus polychronic* cultures (MONO\_POLY), where the former tend to use time as a linear scheduling framework and focus on intensified contact with one, two or maximum three people at a time (Hall, 1966).

Furka (2013) also highlights the problem of using dimensions as a concept, which Hofstede (1995) had earlier addressed as well. It must be taken into consideration that analysis of cultural variations with the help of dimensional scores is only meaningful at a comparative group level. In other words, scores on the dimensional positions of each country are meaningless in themselves. They only signify something when compared to other nations' or groups' scores, i.e., the tendencies the countries/groups show may be compared. For example, Hofstede, Hofstede & Minkov (2010) assign Hungary a score of 46 for power distance on a scale of 100. In itself this does not reveal whether Hungary is low power distant or not. Only when Hungary is compared to another country, say Japan with its score of 54, can it be said that Hungary has a tendency for lower power distance than Japan, as a result of which certain situations might be handled differently in the two cultures. Sondergaard (1994) also highlights that using cultural dimensions as an analytical tool may be fairly applied when more groups or units are investigated.

Some criticize discussion of the notion of national cultures as promoted by the Hofstedian framework, as they fear it fosters stereotypical thinking and might lead to prejudiced behaviour (Shaumjan, 2006). Others emphasize the danger of ethnocentrism in approaching culture as a measurable construct, claiming the instruments used for measuring it might reflect only one type of thinking, that of the researcher, and might disregard other interpretations of a certain phenomenon (Jones, 2007). However, although both claims are certainly justified if research is done incorrectly, with proper care stereotypes can be successfully used in raising awareness of cultural value differences (Furka, 2013), and intercultural research groups can help to avoid ethnocentric research protocols (Bond, 1987).

### 3 Research design

As the study aims to generate a hypothesis and explore a phenomenon, its research design followed the exploratory case study (Creswell, 2007; Yin, 2003; Flyvbjerg, 2006). The specific research questions investigated were (1) whether differing cultural value orientations may be responsible for the issues identified in the staff room discourse, and (2) if so, whether these value differences can be described with the help of cultural dimensions. Participatory action research (PAR) was also involved (Creswell, 2007), since the researcher was part of the researched community and context. To keep transferability, credibility and trustworthiness of qualitative research in the forefront (Szokolszky, 2004), the grounded theory approach put forward by Glaser and Strauss (1967) was employed inasmuch as a wide range of sources of data were analyzed, ensuring triangulation of sources and methods (Lincoln & Guba, 1985). Data sources consisted of a questionnaire on value orientations, and open-ended focus group and individual interviews were also carried out, in some cases with questionnaire respondents. Data analysis involved basic statistical calculations on the questionnaire data, and the constant comparative method and a thick description (Geertz, 1973) of the interviews were employed in the analysis to ensure traceability (Boeije, 2002).

It is often said that case studies are context-dependent and less valuable than context-independent, general research, or that single-case studies cannot be generalized and therefore are not useful for scientific development. However, it cannot be denied that case studies do constitute an important element of human expert learning because it is by studying several cases that expert knowledge is formulated (Flyvbjerg, 2006). Furthermore, to all intents and purposes social science simply cannot yield context-independent knowledge and theory, but this does not mean it should be disregarded. The use of case study research is justified by the wealth of detail (Creswell, 2007) that can be obtained using various data collection methods and by the fact that it easily lends itself to the investigation of multiple facets of a phenomenon (Yin, 2003).

### 3.1 Instruments, participants and data collection

The present paper focuses on the value differences of the two groups present in an educational setting that I am a part of and have access to. The institution is situated in the north-western part of Budapest, the capital of Hungary. It has 627 students in 6-year programs and 4-year programs, aged from 13–18 or 19. Students are placed in 19–20 classes of 34–36, depending on how many students apply in a year. There is a central entrance exam to gain admission; there have been enough applicants to fill classes for the past 10 years. Applying students choose the school either for its location or for academic reasons. Most of the students are either from the neighbourhood of the school (30%) or the agglomeration lying to the north-west of the capital (30%), or they favour one of our classes specializing in foreign languages, History and Maths or Maths and Physics. The teaching staff consists of 52 teachers, 20% of whom are former students.

Data collection took the form of a survey questionnaire (Dörnyei, 2005) on the one hand, and a focus group and individual interviews (Szokolszky, 2004) on the other to ensure triangulation of data sources (Lincoln & Guba, 1985).

The survey instrument consisted of a two-part Likert-scale questionnaire in Hungarian with 36 statement pairs on cultural value orientations grouped according to the 12 dimensions listed by Furka (2013) (see Section 2). Three statement pairs belonged to each dimension. The statements were formulated in such a way as to signify the poles of the given dimension. The Likert scale of four scores (1–4) was placed between the two statements of each pair. Thus, choosing score 1 or 2 meant the respondent felt closer to the statement on the left, whereas choosing scores 3 or 4 meant they agreed more with the statement on the right. For each dimension score 1 meant the pole mentioned first in the name of the dimensions (e.g. low versus high PDI: score 1 = low power distance, score 4 = high power distance, or FEM-MAS: score 1 = femininity: score 4 = masculinity).

The items were originally created by SIETAR, the Society for Intercultural Education, Training and Research based on Hofstede's Value Survey Module (VSM94); they were subsequently translated into Hungarian and applied in research by Groniewsky (2001). I revised, amended and piloted the questionnaire for use in EFL teaching (Furka, 2013) as part of my doctoral studies. For this particular piece of research, I reformulated some items to match the target participants. The second part of the questionnaire contained statistical questions about participants' gender and age and whether they wanted to hear about the results of the research, and provided space where they could describe anything else concerning their educational experience. Having two groups to survey, I arrived at a questionnaire with two versions, one addressing students and one teachers (see Appendix A and B respectively).

The questionnaire was administered to secondary school students from grade 9 (aged 15) and above through grade 12 online via the school's social media platform. 85 questionnaires were filled in. Younger respondents were excluded from the survey due to the fact that some notions in the items required more advanced conceptual development than 7th and 8th graders might be capable of at the age of 13 and 14. For teachers, a link was disseminated via the staff circular email to direct them to the online questionnaire.

Furthermore, interviews with three groups of students and three individual teachers supplemented the surveys. Student interviewees were selected with the method of convenience sampling (Dörnyei, 2005), that is, groups of students I teach were interviewed during school time in Hungarian. As the survey was done anonymously, there were no data on how many of the interviewed students had actually filled in the questionnaire. The three interview groups consisted of 42 10<sup>th</sup>, 11<sup>th</sup> and 12<sup>th</sup> graders (aged 16 to 18/19), with 16 boys and 26 girls. For the teacher interviews I asked fellow teachers

if and when they could manage to find a suitable time slot to conduct the interview. Again, it is unclear whether they filled in the questionnaire or not.

The interviews were recorded in open-ended semi-structured sessions in Hungarian where the leading question prompted students to disclose their 'problems' with their teachers or the system, in other words their educational experience (see Appendix C). With any issue that was unclear to me during the interview or arose during the session that seemed worth exploring from a value orientation point of view, I asked for explanations, such as 'What do you mean by that?' or 'Could you please elaborate on that?' Sometimes I would reiterate the interviewee's statement and ask for confirmation, such as 'So, you mentioned that... and that meant for you that..., is that correct?' Depending on whether I paraphrased the issue according to their originally intended meaning, respondents said yes or elaborated on how I might have misunderstood or ignored an aspect that was important to them and they therefore had a chance to reiterate their views. For example, to the question "What are your problems with your teachers?" one student asked back whether they should consider the teaching skills or the personality of the teacher. I replied that both aspects were certainly important; therefore they should consider both. Then the following interaction took place (as the interviews were carried out in Hungarian, the interactions quoted in the following are my translations):

**Student A:** *"In many cases the teacher behaves as a normal human being, but is not able to teach properly."*

**Student B:** *"Or the other way around. Both."*

*Others strongly agreed with nods or saying "yeah" all around the group. At this point I interrupted with:*

**Interviewer:** *"So both, you said (to student B), then let's clarify what you mean. You say that a certain teacher is OK as a person, but cannot teach, or they don't want to? (waiting for confirmation of my idea expressed in my question.)"*

**Student A:** *"Both. They don't want to or they can't."*

**Student B:** *"Others are not completely normal, (laughter in the group) and cannot teach either."*

**Interviewer:** *"So the teacher is 'not normal' and cannot or does not want to teach. And which one is problematic for you? The fact that they cannot teach, or they don't want to teach, or that they are not OK as a person?"*

**Student B:** *"That they cannot teach and as a person are not OK."*

**Interviewer:** *"And if they don't want to teach? That's OK?"*

**All the students:** *"Yeah that is also a problem."*

**Student A:** *"GB tries to teach chemistry, but he can't because the class is not interested in it at all."*

**Student B:** *"GB does not teach, meaning he does not discipline the class when we do not pay attention. He is alright as a person, though, but he does not make an effort to discipline us."*

**Interviewer:** *"So he is very OK as a person, but he cannot discipline you because you cannot behave yourselves. Should you behave yourselves?"*

**Student B:** *"We don't want to."*

**Interviewer:** *"Okay, okay, but should you?"*

**Student C:** *"It's so easy not to!"*

**Interviewer:** *"But should you?"*

**Student D:** *"Yeah we should. But we can't at this age."*

**Student E:** *"It's up to him if we cannot control ourselves."*

**Interviewer:** *"It's up to him? I'm sorry to jump onto certain expressions that you use...Why is it up to him that the class does not stay quiet and pay attention?"*

**Student C:** *"Because if he cannot maintain discipline, we will never learn that we should be quiet in the lessons."*

**Interviewer:** *"Why should he discipline you and not you yourself?"*

**Everybody:** *"Because he is the teacher. And it disturbs him, not us."*

**Student A:** *"Well, it disturbs me as well."*

**Student F:** *"But those stay quiet who are disturbed by noise and the lack of discipline."*

*(Indistinguishable parallel conversations within the group, I pay attention and grab onto the next emerging topic).*

**Interviewer:** *"So Geography is a problem?"*

**Everybody:** *"Yeah, she [the teacher] is a problem!..."*

### 3.2 Methods of data analysis

Both the student and teacher questionnaires covered 12 dimensions of value orientation with 3–3 statement pairs for each dimension. The three items connected to each dimension (for instance items 1–3 were about power distance) were calculated for means, medians and modes. Calculating these mathematical values helps interpret the answers of the respondents. The mean provides the numerical average of the answers. The median helps to highlight the dividing line that cuts the data in half, whereas the mode provides the most frequently chosen option, thereby illustrating the preference on the dimension (Szokolszky, 2004). All these together constitute the tendency of the group of respondents on the researched dimensions. The results of the student group for each dimension were compared to the ones of the teacher group.

The interviews were analyzed with the constant comparative method of grounded theory (Kolb, 2012) to find categories of values in the reported ideas. Looking for categories was based on the definitions of the 12 dimensions listed above in Section 2 (for the complete definition of each dimension see Furka, 2013).

## 4 Results

### 4.1 Questionnaires

The student questionnaire was filled in by 85 students (about 17% of the target group) aged 15–20, 28 of whom were male and 57 female. 16 respondents did not give their ages. Out of the 52 members of teaching staff, 13 filled in the questionnaire (25%). 1 respondent was male, the rest female. One respondent gave her age as 25–9, one as 45–49 and one as 65–69. The others chose not to give their ages.

The mean, the median and the mode for the students' scores on the items of the questionnaire are listed in Tables 1–3 below. The dimensions are marked with the name of one end of the poles in the tables, for instance, LPDI stands for the dimension of power distance where score 1 signals the low end of the dimensional continuum and means a preference for low power distance, and score 4 means high power distance. Similarly, score 1 in COLL refers to emphasis on collectivism rather than on individualism (score 4), score 1 in FEM means a preference for femininity and score 4 means masculinity etc. In other words, the higher the score, the more it marks the other end of the dimension, not the one at the top of the columns.

Table 1 lists the means of the students' and the teachers' answers. The students' means are approx. +0.3 higher towards monochronic orientation, approx. +0.4 higher towards high power distance, specific, neutral, and inner orientation, approx. +0.5 higher towards achievement and universalism. The dimensions of collectivism, femininity, context dependence, short term orientation and uncertainty avoidance

show less than 0.2 difference in either direction, which indicates very similar values between the two groups.

<b>MEAN</b>	<b>LPDI</b>	<b>COLL</b>	<b>FEM</b>	<b>SPEC</b>	<b>ACH</b>	<b>LCON</b>	<b>UNIV</b>	<b>NEUTR</b>	<b>INNER</b>	<b>STO</b>	<b>UAI</b>	<b>MONO</b>
<b>Students</b>	2.333	2.165	1.463	2.400	1.616	2.373	2.773	2.678	1.988	3.122	1.776	2.451
<b>Teachers</b>	1.949	2.077	1.641	2.000	1.179	2.410	2.256	2.231	1.590	3.205	1.615	2.179

Table 1. Means of responses on the 12 dimensions of the student and teacher questionnaires.

Abbrev. LPDI: low power distance, COLL: collectivism, FEM: femininity, SPEC: specific, ACH: achievement, LCON: low context, UNIV: universalism, NEUTR: neutral, INNER: inner orientation, STO: short term orientation, UAI: uncertainty avoidance, MONO: monochronic.

Table 2 lists the medians of students' and teachers' answers. On the dimensions of power distance, collectivism-individualism, femininity-masculinity, specific-diffuse, achievement-ascription, context dependence, and short versus long term orientation the medians are the same. Universalism, neutral, inner orientation and uncertainty avoidance are 1 score higher for the student population, tending towards universalism, neutral, inner orientation and uncertainty avoiding ends of the dimensions.

<b>MEDIAN</b>	<b>LPDI</b>	<b>COLL</b>	<b>FEM</b>	<b>SPEC</b>	<b>ACH</b>	<b>LCON</b>	<b>UNIV</b>	<b>NEUTR</b>	<b>INNER</b>	<b>STO</b>	<b>UAI</b>	<b>MONO</b>
<b>Students</b>	2	2	1	2	1	2	3	3	2	3	2	2
<b>Teachers</b>	2	2	1	2	1	2	2	2	1	3	1	2

Table 2. Medians of responses on the 12 dimensions of the student and teacher questionnaires.

Abbrev. LPDI: low power distance, COLL: collectivism, FEM: femininity, SPEC: specific, ACH: achievement, LCON: low context, UNIV: universalism, NEUTR: neutral, INNER: inner orientation, STO: short term orientation, UAI: uncertainty avoidance, MONO: monochronic.

Table 3 lists the modes of students' and teachers' answers. The modes are the same for both groups on power distance, collectivism-individualism, femininity-masculinity, achievement-ascription, context dependence, inner versus outer orientation and uncertainty avoidance. There is a preference for specific, universalism, neutral, short term orientation and monochronic orientation with higher student scores in these cases.

<b>MODE</b>	<b>LPDI</b>	<b>COLL</b>	<b>FEM</b>	<b>SPEC</b>	<b>ACH</b>	<b>LCON</b>	<b>UNIV</b>	<b>NEUTR</b>	<b>INNER</b>	<b>STO</b>	<b>UAI</b>	<b>MONO</b>
<b>Students</b>	2	2	1	2	1	2	3	3	1	4	1	2
<b>Teachers</b>	2	2	1	1	1	2	2	2	1	3	1	1

Table 3. Modes of responses on the 12 dimensions of the student and teacher questionnaires.

Abbrev. LPDI: low power distance, COLL: collectivism, FEM: femininity, SPEC: specific, ACH: achievement, LCON: low context, UNIV: universalism, NEUTR: neutral, INNER: inner orientation, STO: short term orientation, UAI: uncertainty avoidance, MONO: monochronic.

The second part of the questionnaire contained an option for open-ended answers concerning what other problems respondents might have in connection with their educational experience. Some students remarked that teachers should pay more attention to students since not everyone might get the necessary amount of attention at home. Another expressed opinion was that education is set by external factors that limit students' free time, which puts psychological pressure on them. Furthermore, it was mentioned that the problems of student-teacher relationships are often influenced by the system within which the participants have to operate, which overloads not only students but teachers as well. As a result, students sometime turn their anger on the closest stakeholder within reach, that is, the teacher, even though in many cases the teachers do not agree with the system either. In addition, some mentioned that a renovation and more comfortable chairs and sofas would be welcome to make the school more attractive to spend time in. Others expressed a need for the student organization to do more in order to create a student community; yet another respondent expressed a similar view mentioning that there is hardly enough time for students to socialize even though they crave it. Finally, another comment referred to the need to hire expert teachers who do not degrade the reputation of the school. Teachers' answers in the open-ended 'other problems' section highlighted the fact that student-teacher relationships are more complicated than a questionnaire can reveal, that some items were "too trendy", or that the wording suggested the answer already. The fact that the relationship between teachers and students is a multifaceted process could explain why no further elaboration was given in this section and no other problematic issues arose. Concerning the 'trendiness' of the items, some items might have triggered this remark. For instance, Q8 showed two poles:

Boys can be caring and thoughtful, and can be interested in their environment and the weaker around them; it does not make them less of a man.

versus

A boy should be tough, assertive and a high achiever, he should not pay attention to such things as the beauty of the environment around him or supporting the weaker.

whereas Q33 had the following two poles:

I do not mind change, or unknown and unexpected situations.

versus

I do not adjust well to change, unexpected or unknown situations.

These items might have been viewed as 'trendy' as a result of being part of mainstream and social media on an everyday basis. Why the items might have been suggestive, i.e. making the respondents answer in a certain way, cannot be clarified due to the anonymity of the questionnaire. Before future application of the questionnaire, the issue might be addressed via the think-aloud method of piloting a questionnaire (Dörnyei, 2005).

## 4.2 Student interviews

Student interviews revealed several issues of being looked down on by teachers, or not being treated as equals when they would like to express their opinions. Student I mentioned that "*Some teachers explicitly look down on us, some just think they are above us because they are adults and teachers, but at least behave in an OK way,*

*you can manage things with them otherwise.*" Teachers get upset when students do not greet them in the corridors but they do not greet students either, which students felt reflects a double standard. This was illustrated in several comments: Student B said *"She expects us to do things she cannot do herself successfully,"* or student G: *"A teacher needs to behave consistently."* or Student H: *when teachers are late for the lesson, we cannot say anything about that!"*)

They also complained that some teachers are so burnt-out that their lack of motivation to teach is obvious. Student H: *"The Geography teacher comes into a lesson three minutes late and leaves ten minutes early. And still writes in the e-register if we were late for the lesson...."* Students expressed that this is not fair towards them. They might not always be motivated to learn the way the teachers expect them to, they said, but not teaching properly will definitely not create more motivation in them. In addition, students claimed that if they had a problem with a staff member, most of the time it was not possible to discuss problematic or unjust situations. For example, in one case students were 9 minutes late for a PE lesson. The teacher was very angry with them and recorded their being late and even reproached them for it, when the students claimed they were late because they did not have the proper information as to which gym room to go to. At the next opportunity, however, they did not initiate a discussion with the teacher. Student B: *"There are things we do not say to the teacher, because it becomes worse afterwards."* Students feel it is easier to keep quiet and suffer through compulsory education than to express their opinions for fear of worsening the case or receiving retribution. When asked what their parents said in these cases, they replied that parents also supported the option of staying quiet, based on their own past educational experiences.

Another issue raised by the students was the general status of being overburdened with seemingly unnecessary subjects and the depth of subject material. Student A said: *"We just spoke about it yesterday, how the expectations are getting higher and higher. For example, the plus points for a language exam will be taken away as the language exam will be compulsory for anyone applying to university. My sister could get them, but for me it's going to be harder."* They also feel that memorizing too many details and reiterating them for oral exams does not prepare them for identifying logical connections, their competence-based final exams or real life situations. When they remark on any of this they are reprimanded, as student A said: *"We are labelled as the weak generation, because our parents don't beat us at home!"* or student B said: *"Shouldn't it be a teacher's responsibility to teach us differently if the way they were handled was not so good? No, instead they keep telling us how we are below them for not having to endure the same negative things in our childhood as they had to. I don't think that's fair to us."*

Finally, the interviews highlighted the students' need for more varied teaching methods to prevent monotony. They did not complain about frontal teaching methods per se but they are open to new, experimental methods, and the common denominator was that whatever the method of teaching, it should be clarified what the expectations at exams would be. Student I said: *"They have been teaching with the same methods for two hundred years, but the exams have changed. The methods haven't."* Student B: *"The building looked the same, the desks were the same, when this building was put up."* They explicitly disliked it when they had to simply read the textbook and think for themselves, and then tests asked questions which they felt were unrelated to the topic or the way they approached it during lessons or through the textbook. The importance of tests covering what they had been taught, that is content validity (Szokolszky, 2004), was a recurring issue in the interviews.

### 4.3 Teacher interviews

Teachers revealed a number of things in the interviews. Firstly, Nora, a young colleague, mentioned that the biggest problem she faces is keeping discipline in her classes. She believes this is due to her age being very close to that of her students, which makes it difficult for them to maintain the hierarchy of the student-teacher relationship. In addition, she said, *“resulting from my personality, I prefer to work along with the students, treat them as being my equal, which has so far turned out to be difficult for them to adapt to.”* It seems to her that their expectations of a teacher do not match that of a less hierarchical relationship. She said: *“I have to discipline them, because they do not know how to do it. The 7<sup>th</sup> graders are so hyper, that they cannot adjust to this frontal educational system.”* When asked if it is her task to discipline them instead of the students disciplining themselves, she replied: *“the students feel how far they can stretch the boundaries with each teacher and they feel they can do it a lot more with me than with others, which disturbs me, because I don’t feel in charge, which is the expected power set-up in a classroom.”* Another issue she faces is how to gain their respect *“if they hate school as it is. I don’t think I’m doing anything against them, I try to help them in every way to adjust to requirements, yet I feel they hate me just because I am a teacher.”* When she was asked in what situations or cases she feels ‘OK’, she said: *“It is true I have a good relationship with many students precisely because I don’t create such a strongly hierarchical structure in my attitude towards them, and they like the fact that I listen to them, allow them to let off steam to me if they have any problems with their studies or their lives. But with the 7<sup>th</sup> graders it is a problem at the moment.”* Finally, she mentioned how the system feels too tightly controlled for her and that it should give more freedom to teachers to decide what and how to teach and behave with their students, to make them feel they are trusted.

Ella, a colleague with almost 40 years of experience, mentioned that times have indeed changed; for example, social processes and interaction, the appearance of the celebrity world, and the fact that families do not function properly. She said *“families do not teach their children to work hard for things but instead provide them with everything they wish for.”* Thus, students do not learn the value of hard work, which translates into demotivation in school. *“In the past one had to study and work hard to achieve something,”* Ella said, whether that meant becoming a Nobel Prize-winning scientist or the local grocer, but one had goals which one had to toil for. She feels these days it seems that *“the younger generations receive every whim without exerting themselves, they even think knowledge is something they should get, instead of something valuable to work for.”* So, it has increasingly become the teacher’s role to teach the value of hard work to students with his/her actions, as a role model. She commented that

[t]eachers need work to teach not only their subject, but also to think. I usually tell my students that I don’t teach them Pythagoras’ theorem so that they can frighten their grand-children to death with it in the future, but because it is a mathematical subtopic that I can use excellently to make them practice logical thinking.

She further added to the reason why this generation seems to be so out-of-touch with the teachers’ is that *“as teachers are almost at the bottom of social and financial appreciation, their life does not show that hard work and great knowledge may pay off,”* so they cannot function as a role model as they actually should, in her opinion. Finally, she mentioned how maintaining a united front by teachers towards students on values to be passed on would greatly ease everyday work at the school. She phrased it as follows: *“We have been changed by societal changes as well, we have begun to convey different values than we used to. By ‘we’ I mean teachers as*

*a collective group. In my opinion there are many colleagues who do not project appropriate values and do not motivate their students in the appropriate way to want to know something, to want to become someone.*"

The third colleague, Sophie, was an abundant source of information, possibly due to her background in alternative teaching methods. She tries to use innovative techniques in her teaching but finds it challenging to make her students work hard and persistently towards a goal in the state system. She said that *"they avoid exerting any energy, which is reflected in how they would rather ask the teacher to tell them what to know for the exam instead of looking for information on their own. [...] Their motivation seems to work on the principles of business arrangement and not the pure satisfaction of knowing something."* For example, her 9th graders are interested, think for themselves and ask questions, but then they do not learn, that is, they do not memorize data. They lack the urge for precision and creativity and want to run on to the next task, to be done with it. They feel time spent on thinking about something is wasted. She believes

it is because they are overloaded, not in the fashionable sense of the word, but from a neurological perspective. They have to live in a 'noisy' world and have to spend time, for instance, sitting here in the school, sometimes for nothing. Because they are in a hurry all the time, they do not want to spend time studying. They are full of extracurricular activities, but they have to run there, too. They cannot distinguish between what is important or not. They don't have time to decide on that either. Of course, I don't want to generalize; there are exceptions to the rule.

When asked to work in groups to avoid the classical frontal teaching method, students do not cooperate, but *"rather work separately alongside each other because they do not want to adapt to the others,"* she said. They do help each other either when they are supposed to or when it is about cheating on a test. In addition, while being bored by frontal teaching, students still demand the centralized summary and the guidance of *"this is what I want you to know for the exam and test."* She also said that *"they love stories that colour the material but do not bother to remember them."* Furthermore, parents have strong expectations of the teachers. They ask at home about the syllabus the children have to learn from and the material to be covered from the textbooks. She highlighted that *"with these expectations at home, it is obvious that students will reiterate the same at school."* It is also easier and safer because if the student makes an effort, spends time thinking, and then their answer in the test is not correct, it has been a waste of time and energy as their mark will not reflect their efforts. However, she emphasized that *"by grades 11 and 12, students start to realize why I taught the material the way I did and realize I was right in doing so."*

She thinks this generation's nervous system is overloaded in a noisy world, where they are bombarded with too much information, or are taken from one lesson to the next even in their free time, so they have no time for anything. Everything is rushed. As a result, *"they cannot decide what is important and what is not. I have a feeling,"* she said, *"that it might be connected to smart phones, as using these devices on an everyday basis seems to change how students process information, which influences their learning techniques as well."*

Another issue she raised was the lack of respect towards teachers as members of the elder community. She can get respect if she raises her voice but when they are treated as equals, students' behaviour deteriorates to *"being very direct in a disrespectful way."* She thinks *"the lack of respect stems from a lack of trust that elders will provide safety; that they know more so younger ones can turn to them for guidance. This is what should be reflected in how one acts towards the older generation,"* she says, but the new generation does not seem to have this trust in previous ones.

## 5 Discussion

The data from the questionnaires and the interviews revealed that issues teachers talk about in the staff room may indeed be connected to value orientation differences between teachers and students, however difficult it is to 'measure' them. At first glance, the results of the questionnaire show relatively little numerical difference between the two groups of respondents, which could be interpreted as meaning that there is no difference between the values of the two groups. For instance, on collectivism the mean of the students is 2.165 with both the median and the mode at 2, whereas teachers' answers averaged 2.077, with the median and mode also both at 2. On power distance the means are 2.333 for students and 1.949 for teachers, a stronger difference, but the medians and the modes are both 2 and 2 respectively for both groups.

However, the data are meaningful if the contextual meaning of cultural value orientations is examined (Hofstede, 1995). The strongest differences on the Likert-scale section of the questionnaire were towards higher power distance, stronger diffuse ascription, particularism, affect and outer orientation for students. Concerning the open-ended section, the need for more attention towards students reflects the value of femininity, the need for less structure can be interpreted as a sign of tolerating uncertainty and a wish for lower power distance. The need for comfort at the school as well, not only at home, can be interpreted as the value of a more diffuse school life for students. The need for more student life seems to reflect the value of more collectivism.

The issues raised in the interviews may also be connected to the dimensions of power distance (trust, respect and frontal teaching, canonization of material), uncertainty avoidance (trusting older generations, taking risks in group work, alternative learning methods, preference for frontal teaching), content validity of testing and the educational system (harmony of material, teaching methods and final exams), as well as achievement (past need to work hard for something, as opposed to entitlement (ascription) these days), and individualism (lack of real cooperation in group work, canonization versus individual opinion).

Students seem to tend towards both a higher and lower power distance than teachers, they expect guidance and a framework to work in to achieve the best results in their final exams, but they want to work as equal partners with the teacher, not to be treated as inferior underlings. Their need for proper guidance for test preparation seems to show a tendency towards uncertainty avoidance, while the higher scores towards ascribed values might reflect what society seems to suggest to them with celebrities and influencers around them: one does not have to put something down on the table to become someone. The tendency towards outer orientation reflects what they said in the interviews: namely, that it is easier to swallow their problems than to change the system. The tendency towards particularism can be detected in the fact that students find tests without proper content validity unfair. This practice evokes the idea that rules – of fairness, for example – do not apply to everyone. In addition, students' problems with learning the standard as opposed to being allowed to express their own opinion or work on the subject matter they are interested in seem to reflect a more individualistic attitude. Furthermore, the need for more social life and quality time among students reflects a collectivist preference. Finally, the complaint from teachers that students do not wish to work hard for goals but expect everything to fall into their laps because they are entitled to it represents a shift on the dimension of achievement – ascription.

It is true that other factors might be responsible for the above-mentioned differences. Firstly, the complaints of teachers simply might stem from the local school culture, and not constitute a widely observable phenomenon. Secondly, whether requirements have objectively increased or the older generations of teachers are just tired and the new generations of students are really less motivated and

willing to work hard remains to be confirmed. Thirdly, it is also possible that a strong uncertainty avoidance tendency in the national culture would result in the need to avoid change, or a tendency towards short term orientation would be reflected in the need to respect past traditions. All these could be influencing the values behind the National Curriculum, which in turn dictates what and how teachers and students can and should do in this institution.

Those who would like to see change in the present situation might have to accept that, as many scholars claim, culture is passed on, so cultural values might not be open to change. As Bennett points out (cited in Whalen, 2016) "... in a circular, self-referential process, the institutions of culture are constantly recreated by people enacting their experiences of those institutions" (p.7). It was mentioned in the teachers' interviews how parents expect the teachers to work in ways that correspond to their own memories of being students, thereby influencing current teachers to repeat the scenarios of the previous generation. This way of recreating the past is supported by Hofstede, Hofstede, & Minkov (2010) who go so far as to claim that "national value systems should be considered given facts, as hard as a country's geographical position or its weather" (p.20). Schwartz (2006) also maintains that cultural value orientations seem to be relatively stable, but he on the other hand allows for some gradual change due to the influence of societal changes, technological advances, being in touch with other cultures, or an increase in wealth. These might all lead to a different emphasis within value orientations.

Nevertheless, how stable culture is depends on factors exerting pressure on culture. As Minkov (2013) summarizes: "The available evidence suggests that the question of how stable or changeable culture is cannot have a definitive answer that is valid for all cases. It depends on the society, on the type and strength of factors that are exerting pressure on its culture, and on the kind of change that is measured" (p.24). Thus, if the types of pressure that influence the culture of Hungary these days could be identified, issues such as dissatisfaction with the educational system could be reacted to. Further research is however needed to see precisely what kind of adaptation the Hungarian educational system would need to undergo to function in a more balanced way.

## 6 Conclusion

The present research was conducted in a specific secondary institution to see whether there were underlying value orientation differences in the expectations on the part of students and teachers towards each other that had been reflected in constant complaining and finger-pointing among both groups. It was found that there are indeed value differences between the two groups, yet their statistical significance needs to be tested in the future. In addition, it was also confirmed that the problems recurring in staff room discussions seem to be linked to the cultural dimensions of power distance and uncertainty avoidance, as well as individualism, particularism, outer orientation, and ascription.

However, it was also reflected in some of the data that there might be independent reasons for the difference between students' and teachers' expectations. For example, the third teacher interview mentioned the washback effect of final exams, which seems to cause certain teaching and learning practices to remain unchanged despite having been reported as outdated, boring or not fit for the current generation of digital natives. Other characteristics of the educational framework that have emerged as problematic (such as the marking system or how students are treated by teachers) could change regardless of the academic output goals.

Based on the above, it would seem timely and relevant to conduct a national survey on the value orientations of the teaching community as well as parents

and students, together with an analysis of the National Curriculum from a value orientation point of view to determine what kind of value orientation the future changes should be based on. If the stakeholders of education were aware of each other's values concerning the role of teaching, the purpose of education and the output goals, it could help to harmonize expectations among parents, students and teachers, and thus to produce an overall better functioning, more efficient and well-balanced educational system.

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**Author data:** Ildikó Furka has been an EFL teacher for 20 years. Her research interests stem from everyday situations she faces as a language instructor. Based on personal experience, she firmly believes in values shaping one's behaviour in the world. She is passionate about cultural value dimensions and how they help one see the Big Picture.

## APPENDIX A

### Student questionnaire: Value orientation survey among students in secondary education

Értékek az iskolában – értékorientációs felmérés az iskolai élet szereplői körében

Kedves Válaszó!

Az alábbi kérdőív állításpárokat tartalmaz egy-egy, az iskolai életben is megjelenő értékkel, viselkedéssel kapcsolatban. A két állítás között lévő skálán azt az értéket jelölje meg, amelyik állítással egyetért. Válaszait név nélkül kezeljük, és a kutatási eredményeket kérésre megküldjük.

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Köszönettel

dr. Furka Ildikó Zsuzsanna

Q1					
A tanárral mindent megbeszélve szeretek diákként dolgozni.	1	2	3	4	A tanár irányítsa a diákokat a munkában.
Q2	1	2	3	4	
A tanárokat nem tegezem, de jó lenne.					A tanárokat magázom, és ez így van jól.
Q3					
A tanár által mondottakat szemtől szemben is megkérdőjelezem, ha nem értek egyet vele, ez nem tiszteletlenség.	1	2	3	4	Nem kérdőjelezem meg a tanár által mondottakat, és nem mondok neki ellent szemtől szemben, mert az tiszteletlenség.
Q4					
Az osztályt és az osztályérdekeket előbbre helyezem az egyénnél és az egyéni érdekeknél.	1	2	3	4	Az egyént és az egyéni érdekeket előbbre tartom az osztálynál és a csoportérdeknél.
Q5					
Kitartok diáktársaim mellett, hiszen egy csapat vagyunk.	1	2	3	4	Diáktársaimmal köteleim viszonylag lazák, nem tartok ki mellettük minden áron.
Q6					
Törődöm a tanáraimmal, hiszen ők is törődnek velem.	1	2	3	4	Nem magától értetődő, hogy törődöm a tanáraimmal, mert függetlenek vagyunk.
Q7					
Azt szeretem, ha a fiú és lány diákok viselkedése nem kell, hogy eltérjen nemük miatt.	1	2	3	4	Azt szeretem, ha a fiú és lány diákok különbözően viselkednek a nemük miatt.
Q8					
Egy fiú diák is lehet törődő, odafigyelő, foglalkozhat a gyengébbekkel és a környezetével, ettől még nem kevésbé férfi.	1	2	3	4	Egy fiú diák legyen kemény, határozott, teljesítsen jól és ne foglalkozzon olyan dolgokkal, mint a környezet szépsége vagy a gyengébbek támogatása.
Q9					
Az együttműködést, egymás támogatását és az általános jólét elérését/fenntartását tartom diákként fontosnak.	1	2	3	4	A versenyszellemet tartom diákként fontosnak.
Q10					
A magánéletemet élesen elhatárolom az iskolai életemtől.	1	2	3	4	A magánéletem nem különül el élesen az iskolai életemtől.

Q11					
Nem zavar, ha nincs személyes kapcsolatom diáktársaimmal, ettől függetlenül tudok velük jól dolgozni, csak az iskolai feladatok erejéig érdekelnek.	1	2	3	4	Jobban meg kell ismernem a másik diákokat ahhoz, hogy jól tudjak együtt dolgozni vele.
Q12					
Ha a tanárom megkér, hogy segítek kifesteni a házát a hétvégén, egyértelműen nemet mondom, hiszen semmi közöm a magánéletéhez	1	2	3	4	Ha a tanárom megkér, hogy segítek kifesteni a házát a hétvégén, igent mondom, hiszen a tanárral való viszonyomtól függ a tanulmányi előmenetelem
Q13					
Diákként az számít, ha teljesítek és elért pozíciómat nem veszem magától értetődőnek.	1	2	3	4	Az számít diákként, ha státuszom és kapcsolataim vannak, elért pozíciómnál a teljesítmény nem számít.
Q14					
Az iskolában diákként az a fontos, hogy keményen dolgozom, ennek mindig megvan a gyümölcse, és szorgalommal egyről a kettőre jutok.	1	2	3	4	Az iskolában az a fontos, hogy milyen a viszonyom a tanárral és nem az, hogy hogyan teljesítek nap mint nap.
Q15					
Egy tantárgyat azért veszek komolyan, mert hasznos tudni.	1	2	3	4	Egy tantárgyat, azért tanulok, mert státuszt képvisel és fontos leszek tőle.
Q16					
Nem mondom ki mindig mindent, mert ha valaki olvas a sorok között, úgy is tudja, mire gondoltam.	1	2	3	4	Mindig kimondok mindent, mert a sorok közötti jelentés mindenkinek más lehet.
Q17					
Diákként íratlan szabályokkal is jól tájékozodom az iskolai életben.	1	2	3	4	Diákként a leírt vagy egyértelműen kinyilatkoztatott szabályok szerint tájékozodom jól az iskolai életben.
Q18					
Diákként nem zavar, hogy ki kell találnom, ki mire gondol.	1	2	3	4	Diákként azt szeretem, ha mindent egyértelműen elmagyaráznak, és nem kell kitalálnom, ki mire gondol.

Q19					
A szabályokat az iskolai életben mindig minden körülmény között betartom.	1	2	3	4	A kapcsolataim építése és fenntartása fontosabb, ezért a szabályokat az iskolában nem mindig tartom be minden körülmények között.
Q20					
Diákként a szabályokat mindig mindenre egyforma érvényűnek tartom, ezért akkor is jelentek valakit a megszegésükért, ha osztálytársam vagy barátom.	1	2	3	4	Diákként a szabályokat nem tartom mindenre egyforma érvényűnek, és inkább segítek egy barátnak/osztálytársnak, minthogy időben az osztályba érjek vagy betartsam a szabályt.
Q21					
Mindenkire vonatkozó, általános és elvont erkölcsi szabályok alapján döntöm el, hogy mi a helyes és mi a helytelen	1	2	3	4	A szabályokat nem tartom mindenre mindig egyformán vonatkozóknak, hanem más szempontokat is figyelembe lehet venni, lehet kivételezni.
Q22					
Nem mutatom ki az (akár pozitív vagy negatív) érzéseimet, mert az nem iskolai közegbe való.	1	2	3	4	Kimutatom az (akár pozitív vagy negatív) érzéseimet, ennek nincs köze a helyzethez, közeghez.
Q23					
Nem mutatom ki az (akár pozitív vagy negatív) érzéseimet, mert az gyerekes és irracionális.	1	2	3	4	Kimutatom az (akár pozitív vagy negatív) érzéseimet, mert ha nem tenném, titkolódnának és bizalmatlannak tünnék
Q24					
Nem akarom nagy hévvel a véleményem helyességéről meggyőzni a másik felet, akár változtatni is hajlandó vagyok rajta.	1	2	3	4	Hevesen védem meg az álláspontomat, amit nehezen változtat meg.
Q25					
Diákként tudom irányítani és alakítani az életem és a környezetem.	1	2	3	4	Diákként elfogadom az életem és a környezetem úgy, ahogy van, alázatos vagyok.
Q26					
Saját motivációim, belső igényeim és vágyaim hajtanak előre.	1	2	3	4	Olyan külső erők motiválnak, mint a jegyek vagy a tanár utasításai.
Q27					
Ami velem történik, azt én okoztam, én vagyok a felelős.	1	2	3	4	Gyakran érzem úgy, hogy nem tudom irányítani az életem történéseit.

Q28					
Erőfeszítéseimnek azonnali eredményeket kell hozniuk, nem elég 5 év múlva beérniük.	1	2	3	4	Kitartóan kell azon dolgozom, hogy 5 év múlva is fenntarhassam a jelenlegi teljesítményemet, sikereimet.
Q29					
Nekem is meg kell vennem azt, ami a többieknek van, ha nincs is rá pénzem.	1	2	3	4	A spórolást részesítem előnyben.
Q30					
A személyiségem állandó, olyan, ami nem változik helyzetről helyzetre, és jó úgy, ahogy van („Otthon és az iskolában is ugyanaz a személy vagyok” és „Mindig ugyanúgy viselkedem, bárkivel is vagyok”).	1	2	3	4	Még ha van is hibám, azt bizonyos tevékenységekkel fejlesztem, és hajlandó vagyok a célom elérése érdekében kompromisszumokat kötni.
Q31					
Saját magam vizsgálom meg a dolgokat, és el tudom fogadni, hogy az „Igazság” relatív	1	2	3	4	Egy abszolút „Igazság” létezik, és inkább a „közvéleményt”, a többiek véleményét fogadom el.
Q32					
Egy dolog/helyzet nemcsak fekete-fehér lehet, hanem szürke is, azaz IS-IS.	1	2	3	4	Feketén-fehéren gondolkodom, mindig VAGY-VAGY kell, hogy legyen egy dolog/helyzet.
Q33					
Nem zavar a változás, vagy az ismeretlen és váratlan helyzetek.	1	2	3	4	Nem alkalmazkodom jól a változásokhoz, az ismeretlen és a váratlan helyzetekhez.
Q34					
A határidőket betartom és pontos vagyok.	1	2	3	4	A határidőket nem tartom be szigorúan és nem vagyok pontos sem.
Q35					
Inkább elvégzem a feladatom először, és csak azután adok időt az emberi kapcsolatok ápolására.	1	2	3	4	Az emberi kapcsolatok ápolása fontosabb, mint az, hogy a feladatot minél hamarabb elvégezzem.
Q36					
Egyszerre csak egy dologra tudok koncentrálni, mindent alaposan megtervezek és beosztom az időmet.	1	2	3	4	Egyszerre több dolgot is tudok párhuzamosan végezni.

**Adatok****Életkor kitöltés**

- 14 év
- 15 év
- 16 év
- 17 év
- 18 év
- 19 év
- 20 év

**Nem**

- nő
- férfi

Egyéb vélemény/észrevétel, ami az iskolai élettel kapcsolatos:

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Email cím megadása, ha a kutatási eredményt szeretné megkapni:

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**APPENDIX B****Teacher questionnaire:  
Value orientation survey among teachers in secondary education**

Értékek az iskolában – értékorientációs felmérés az iskolai élet szereplői körében

Kedves Kolléga!

Az alábbi kérdőív állításpárokat tartalmaz egy-egy, az iskolai életben is megjelenő értékkel, viselkedéssel kapcsolatban. Az állításpárok egy skála két végpontját jelölik. A skálán azt az értéket jelölje meg, amelyik végponttal inkább egyetért. Válaszait név nélkül kezeljük, és a kutatási eredményeket kérésre megküldjük.

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Köszönettel  
dr. Furka Ildikó Zsuzsanna

Q1					
A diákkal mindent megbeszélve szeretek tanárként dolgozni.	1	2	3	4	A tanár irányítsa a diákokat a munkában.
Q2	1	2	3	4	
A diákokat tegezem, ez a természetes					A diákokat magázom, és ez így van jól.
Q3					
Ha a diák megkérdőjelezi az általam mondottakat szemtől szemben, ha nem ért vele egyet, az nem tiszteletlenség.	1	2	3	4	A diák nem kérdőjelezi meg az általam mondottakat, és nem mond nekem ellent szemtől szemben, mert az tiszteletlenség.
Q4					
Az iskolában a tanári kart és az iskolaérdekeket előbbre helyezem az egyénnél és az egyéni érdekeknél.	1	2	3	4	Az iskolában az egyént és az egyéni érdekeket előbbre tartom a tanári karnál és az iskolaérdekeknél
Q5					
Kitartok tanártársaim mellett, hiszen egy csapat vagyunk.	1	2	3	4	Tanártársaimmal köteleim viszonylag lazák, nem tartok ki mellettük minden áron.
Q6					
Törődöm a diákjaimmal, hiszen ők is törődnek velem.	1	2	3	4	Nem magától értetődő, hogy törődöm a diákjaimmal, hiszen függetlenek vagyunk.
Q7					
Azt szeretem, ha a fiú és lány diákok viselkedése nem kell, hogy eltérjen nemük miatt.	1	2	3	4	Azt szeretem, ha a fiú és lány diákok különbözően viselkednek a nemük miatt.

Q8					
Egy fiú diák is lehet törődő, odafigyelő, foglalkozhat a gyengébbekkel és a környezetével, ettől még nem kevésbé férfi.	1	2	3	4	Egy fiú diák legyen kemény, határozott, teljesítsen jól és ne foglalkozzon olyan dolgokkal, mint a környezet szépsége vagy a gyengébbek támogatása.
Q9					
Az együttműködést, egymás támogatását és az általános jólét elérését/fenntartását tartom tanárként fontosnak.	1	2	3	4	A versenyszellemet tartom tanárként fontosnak.
Q10					
A magánéletemet élesen elhatárolom az iskolai életemtől.	1	2	3	4	A magánéletem nem különül el élesen az iskolai életemtől.
Q11					
Nem zavar, ha nincs személyes kapcsolatom tanártársaimmal, ettől függetlenül tudok velük jól dolgozni, csak az iskolai feladatok erejéig érdekelnek.	1	2	3	4	Jobban meg kell ismernem a másik tanárt ahhoz, hogy jól tudjak együtt dolgozni vele.
Q12					
Ha a főnököm megkér, hogy segítek kifesteni a házat a hétvégén, egyértelműen nemet mondok, hiszen semmi közöm a magánéletemhez	1	2	3	4	Ha a főnököm megkér, hogy segítek kifesteni a házat a hétvégén, igent mondok, hiszen a főnökömmel való viszonyomtól függ a tanulmányi előmenetelem.
Q13					
Tanárként az számít, ha teljesítek és elért pozíciómat nem veszem magától értetődőnek.	1	2	3	4	Az számít tanárként, ha státuszom és kapcsolataim vannak, elért pozíciómnál a teljesítmény nem számít.
Q14					
Az iskolában tanárként az a fontos, hogy keményen dolgozom, ennek mindig megvan a gyümölcse, és szorgalommal egyről a kettőre jutok.	1	2	3	4	Az iskolában az a fontos, hogy milyen a viszonyom a főnökkel és nem az, hogy hogyan teljesítek nap mint nap.
Q15					
Egy továbbképzést - ami nem kötelező - azért végzek el, mert hasznosat tanulok.	1	2	3	4	Egy továbbképzést - ami nem kötelező - , azért végzek el, mert státuszt képvisel és fontos leszek tőle.

Q16					
Nem mondom ki mindig mindent, mert ha valaki olvas a sorok között, úgy is tudja, mire gondoltam.	1	2	3	4	Mindig kimondok mindent, mert a sorok közötti jelentés mindenkinek más lehet.
Q17					
Tanárként íratlan szabályokkal is jól tájékozódok az iskolai életben.	1	2	3	4	Tanárként a leírt vagy egyértelműen kinyilatkoztatott szabályok szerint tájékozódok jól az iskolai életben.
Q18					
Tanárként nem zavar, hogy ki kell találnom, ki mire gondol.	1	2	3	4	Tanárként azt szeretem, ha mindent egyértelműen elmondanak, és nem kell kitalálnom, ki mire gondol.
Q19					
A szabályokat az iskolai életben mindig minden körülmény között betartom.	1	2	3	4	A kapcsolataim, és azok építése és fenntartása fontosabb, ezért a szabályokat az iskolában nem mindig tartom be minden körülmények között.
Q20					
Tanárként a szabályokat mindig mindenkire egyforma érvényűnek tartom, ezért akkor is jelentek valakit a megszegésükért, ha kollégám vagy barátom.	1	2	3	4	Tanárként a szabályokat nem tartom mindenkire egyforma érvényűnek, és inkább segítek egy barátnak/kollégának vagy diáknak, minthogy időben az osztályba érjek vagy betartsam a szabályt.
Q21					
Mindenkire vonatkozó, általános és elvont erkölcsi szabályok alapján döntöm el, hogy mi a helyes és mi a helytelen.	1	2	3	4	A szabályokat nem tartom mindenkire mindig egyformán vonatkozóknak, hanem más szempontokat is figyelembe lehet venni, lehet kivételezni.
Q22					
Nem mutatom ki az (akár pozitív vagy negatív) érzéseimet, mert az nem iskolai közegbe való.	1	2	3	4	Kimutatom az (akár pozitív vagy negatív) érzéseimet, ennek nincs köze a helyzethez, közeghez.
Q23					
Nem mutatom ki az (akár pozitív vagy negatív) érzéseimet, mert az gyerekes és irracionális	1	2	3	4	Kimutatom az (akár pozitív vagy negatív) érzéseimet, mert ha nem tenném, titkolódnának és bizalmatlannak tünnék.

Q24					
Nem akarom nagy hévvel a véleményem helyességéről meggyőzni a másik felet, akár változtatni is hajlandó vagyok rajta.	1	2	3	4	Hevesen védem meg az álláspontomat, amit nehezen változtatok meg.
Q25					
Tanárként tudom irányítani és alakítani az életem és a környezetem.	1	2	3	4	Tanárként elfogadom az életem és a környezetem úgy, ahogy van, alázatos vagyok.
Q26					
Saját motivációim, belső igényeim és vágyaim hajtanak előre.	1	2	3	4	Olyan külső erők motiválnak, mint a pénz vagy a főnök utasításai.
Q27					
Ami velem történik, azt én okoztam, én vagyok a felelős.	1	2	3	4	Gyakran érzem úgy, hogy nem tudom irányítani az életem történéseit.
Q28					
Erőfeszítéseimnek azonnali eredményeket kell hozniuk, nem elég 5 év múlva beérniük.	1	2	3	4	Kitartóan kell azon dolgozom, hogy 5 év múlva is fenntarthatassam a jelenlegi teljesítményemet, sikereimet.
Q29					
Nekem is meg kell vennem azt, ami a többieknek van, ha nincs is rá pénzem.	1	2	3	4	A spórolást részesítem előnyben.
Q30					
A személyiségem állandó, olyan, ami nem változik helyzetről helyzetre, és jó úgy, ahogy van („Otthon és az iskolában is ugyanaz a személy vagyok” és „Mindig ugyanúgy viselkedem, bárkivel is vagyok”).	1	2	3	4	Még ha van is hibám, azt bizonyos tevékenységekkel fejlesztem, és hajlandó vagyok a célom elérése érdekében kompromisszumokat kötni.
Q31					
Saját magam vizsgálom meg a dolgokat, és el tudom fogadni, hogy az „Igazság” relatív.	1	2	3	4	Egy abszolút „Igazság” létezik, és inkább a „közvéleményt”, a többiek véleményét fogadom el.
Q32					
Egy dolog/helyzet nemcsak fekete-fehér lehet, hanem szürke is, azaz IS-IS.	1	2	3	4	Feketén-fehéren gondolkodom, mindig VAGY-VAGY kell, hogy legyen egy dolog/helyzet.

Q33					
Nem zavar a változás, vagy az ismeretlen és váratlan helyzetek.	1	2	3	4	Nem alkalmazkodom jól a változásokhoz, az ismeretlen és a váratlan helyzetekhez.
Q34					
A határidőket betartom és pontos vagyok.	1	2	3	4	A határidőket nem tartom be szigorúan és nem vagyok pontos sem.
Q35					
Inkább elvégzem a feladatom először, és csak azután adok időt az emberi kapcsolatok ápolására.	1	2	3	4	Az emberi kapcsolatok ápolása fontosabb, mint az, hogy a feladatot minél hamarabb elvégezzem.
Q36					
Egyszerre csak egy dologra tudok koncentrálni, mindent alaposan megtervezek és beosztom az időmet.	1	2	3	4	Egyszerre több dolgot is tudok párhuzamosan végezni.

**Adatok:****Életkor kitöltéskor**

- 20-24
- 25-29
- 30-34
- 35-39
- 40-44
- 45-49
- 50-54
- 55-59
- 60-64
- 65-69
- 70-75

**Nem:**

- nő
- férfi

Egyéb vélemény/észrevétel, ami az iskolai élettel kapcsolatos:

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Email cím megadása, ha a kutatási eredményt szeretné megkapni:

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**APPENDIX C****Student interview schedule**

- Question 1: What problems do you see in the educational system?  
Questions 2: What causes conflicts between you and your teachers?  
Questions 3: Why do you think these become problems?  
Question 4: What would you expect of your teachers?  
Question 5: Is there anything you as a student should do differently according to your teachers, but you don't, because other things are important for you?  
Question 6: What is important for you as a student?  
Question 7: What would you expect the educational system to be like?

**Teacher interview schedule**

- Question 1: What problems do you see in the educational system?  
Questions 2: What causes conflicts between you and your students?  
Question 3: Are students these days different from previous generations?  
Question 4: Do you think the reason behind the problems are due to the new generational differences? If so, how?  
Questions 5: Why do you think these become problems?  
Question 6: What would you expect of your students?  
Question 7: What is important for you as a teacher?  
Question 8: What would you expect the educational system to be like?

# AMERICAN AND HUNGARIAN PERCEPTIONS OF CONVERSATIONAL STYLE AND THE ROLE OF THE LISTENER IN ENGLISH CONVERSATION

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## Abstract

The purpose of this study is to investigate how native speakers of American English and Hungarian non-native speakers of English living in Budapest perceive conversational style and the role of the listener in English conversations. Studies have shown that backchanneling behavior differs by culture and language which may have an influence on L2 acquisition and intercultural communication (Maynard, 1986; White, 1989; Stubbe, 1998; Gumperz, 1982, 1992, 1996). This paper reports on the findings of semi-structured interviews conducted with three Hungarian women and three American women, ranging in age from 24–35. Interviews were conducted individually after participation in one of three conversation dyads: 1) American English native speakers 2) Hungarian native speakers 3) mixed. Findings show that participants share similar perceptions of conversational style and the role of the listener. Data suggest, however, that there may be differences in the perception of interruptions and “active listening” between Hungarians and Americans. Furthermore, cultural differences and linguistic proficiency may lead L2 speakers to avoid intercultural communication in the L2 with native speakers.

## 1 Introduction

This paper discusses samples of cross cultural and intercultural communication in Budapest, Hungary. Budapest is a major European city which attracts both tourists and expatriates who seek to enjoy its cultural heritage, low living costs, and business opportunities. While the local language is Hungarian, English often serves as the lingua franca among tourists, expatriates, and locals. Few visitors or long term expatriates dare to learn Hungarian. Generally, English, for its facility, is turned to as the lingua franca in service encounters, business settings, education, etc. My personal experience, as an expatriate living in Hungary and learning Hungarian, indicates that few Hungarians living in Budapest expect non-locals to learn or speak the language. My experience moving to Hungary, living in the culture, and trying to learn the language echoes that of another expatriate Marion Merrick who moved from England to Budapest in 1982 and wrote an autobiographical account entitled *Now You See it, Now You Don't*. During her first days in Budapest, Merrick (2009) reflects on her first encounters with Hungarian:

I [...] idly turned the pages of the Hungarian newspaper lying beside me. I wondered if I would ever learn this language. At a party in England a year before

we had met a Hungarian émigré who told us with some pride that it was a language impossible for a foreigner to learn. (p.11)

The pride is not only in the difficulty, but also in the regional uniqueness and complex beauty of the language. The acknowledgement of these factors and its difficulty for foreigners to learn may explain some of the acceptance of English as a lingua franca (ELF). Despite the fact that ELF facilitates intercultural communication by providing a common mode of communication, it may also hinder intercultural communication and relations. In Budapest, it may appear as if English were everywhere and as if everyone spoke English. ELF, however, is no one's native language. It is difficult to draw the line between where English as a lingua franca ends and English which is influenced by the culture and pragmatics of the native speaker populations begins. When speakers use ELF in intercultural communication in Budapest, where English is not the local language, which set of pragmatic rules and cultural notions do they rely on during conversation? How do non-native speakers and native speakers perceive the dynamics of conversation which influence subtle judgments about speakers and listeners? This paper seeks to explore how native speakers of American English (NSs) and non-native speakers of English (NNSs) living in Budapest perceive conversational style and the role of the listener in English conversations.

While investigating this topic, it is difficult to draw the line between cross cultural and intercultural communication. Gudykunst (2003) defines cross cultural communication as "comparisons of communication across cultures" and intercultural communication as "communication between people from different cultures" (p.1). This paper deals with both. The comparison of native speakers of American English and native speakers of Hungarian is cross cultural. However, it hopes to shed light on factors which influence intercultural communication on a broader scale. Although the participants are Americans and Hungarians, it is impossible to guarantee the comparisons are solely between American and Hungarian culture. L2 speaker perceptions of conversational style and the role of the listener in English may be based on interactions with people from many different English speaking cultures.

## 2 Literature review

Gender studies, anthropology, sociology, and linguistics are just a few of the fields which have contributed to the interdisciplinary endeavor of understanding the dynamics of conversation. Yngve (1970) highlights that conversation has two channels: a main channel used as a speaker takes a turn and a secondary channel used by the listener to give feedback to the primary speaker without taking away the conversational turn. Sacks, Schegloff, and Jefferson (1978) apply the system of turn-taking described in other socially organized activities to conversation. In doing so, the authors describe the dynamics of conversation including participant roles and the rules governing who speaks when. A 'turn' in a conversation indicates when someone speaks. Therefore, roles in conversation include 'speakers' and 'listeners'. Sacks, Schegloff, and Jefferson (1978) set out a framework with a complex set of rules governing turn allocation, turn transition, and turn construction. In conversation not only do participants use various 'unit types' (segments of speech or other signals, such as body language) to allocate, transition, or construct turns, but also perceive such conversational moves and respond to them. Schegloff (1982) adds to the aforementioned turn-taking framework by distinguishing 'primary' and 'non-primary' turns, and suggesting that 'non-primary' turns do not form a single set because they serve different interactive functions.

Later studies attempt to bridge the structural and conceptual frameworks applied to conversation analysis. As Iwasaki (1997) claims, to provide deeper conversational analysis it is necessary to differentiate 'floor units', or simply 'the floor', from a 'turn-at-

talk'. A turn is a simplistic structural notion which denotes when a participant speaks, but is not sufficient to specify the role of the participant. Schegloff (1982) notes that it is possible that during non-primary turns the conversational roles do not change. Floor, therefore, is a unit larger than a turn because it specifies the roles of participants as speaker or listener. The floor is not only a structural, but also a conceptual notion. As defined by Hayashi (1996), the floor can also refer to "a dynamic cognitive entity that links the interactants together socially and psychologically" (p.32).

As the frameworks of conversation acknowledge turn taking rules, attention is also directed to participant roles. Even when participants do not 'hold the floor' in conversation, they play active roles as listeners and provide feedback to the primary speaker. The literature often refers to listener feedback as reactive tokens or backchannels. Iwasaki (1997) states:

[b]ackchannels are formally classified into three types: 'non-lexical backchannels', 'phrasal backchannels', and 'substantive backchannels'. Non-lexical backchannels are vocalic sounds which have little or no referential meaning, and form a closed set. Phrasal backchannels are stereotypic expressions with more substantive meaning than non-lexical backchannels [...] Substantive backchannels, however, are not stereotypic expressions, and they are full of referential content. (p.666)

Non-lexical backchannels in English may include 'mhmm' or 'uh huh'. Phrasal backchannels could be units such as 'Really?', 'You're kidding' or 'Right?'. Substantive backchannels contain referential content related to previous discourse. Some scholars consider backchannels to be a subset of reactive tokens because reactive tokens serve not only as feedback, but also as turn transitions (Clancy, Thompson, Suzuki, & Tao, 1996). For example, Clancy et al. (1996) identify five types of reactive tokens: backchannels, reactive expressions, collaborative finishes, repetitions, resumptive openers. Several frameworks describe the language use of listeners and speakers; however, it is also necessary to consider the perception of language use and its interpretation.

Gumperz (1982, 1992, 1996) highlights the importance of perception in conversation by discussing contextualized cues which are defined as verbal and non-verbal signals participants send during conversation about identity and how they feel towards the other. According to Gumperz (1982), "[c]ontextualized cues trigger participants' background knowledge with regard to social contexts or interpersonal relationships, which then allows them to infer what is happening at the moment and what the speaker's communicative intent is" (p.1944). Contextualized cues are not only backchannels and reactive tokens, but also include other signals such as body language, eye contact, etc. (Maynard, 1993). As Ishida (2006) argues, many studies focus on production of backchannels, reactive tokens, and contextualized cues, but do not examine receptive factors such as perception and interpretation. In intercultural communication, this is especially important as cues may be misinterpreted based on cultural notions or missed entirely. In addition, in conversations involving NNSs, grammatical errors are often attributed to linguistic proficiency, but such perception errors are often (mistakenly) attributed to the character or personality of the speaker (Ishida, 2006; Gumperz, 1982; Cook, 2001).

There is a large body of research on Japanese-English intercultural communication that explores backchannel behavior in English and Japanese (Maynard, 1986; White, 1989; Clancy et al., 1996; Iwasaki, 1997; Ishida, 2006; etc.). The studies find, in general, that Japanese backchannel use differs from English in terms of location and frequency in conversation. This can cause miscommunication or misperception. Mizutani (1982) observes that Japanese listener backchannels meant to communicate "attentiveness, comprehension, and interest" were instead interpreted

as impatience or demand for quick completion of statement. Maynard (1986) confirms previous findings in a pioneering work on Japanese and American English backchannel behavior which analyzes three minute segments of conversations of 12 dyadic pairs. Based on conversational data, Maynard (1986) classifies five functions of reactive tokens, including: continuer, display of understanding content, support and empathy toward speaker, agreement, and strong emotional response. Although Maynard (1986), like Mizutani (1982), indicates that the functions of backchannels are similar, he concludes that the devices, frequencies, and discourse context differ. Since backchannels serve important and similar functions across languages for listeners to communicate with speakers, such discrepancies in use can lead to misinterpretation issues in intercultural communication.

Subsequent studies involving various other language pairs bolster the findings that differences in backchannel use can provide misleading feedback to the speaker (Berry, 1994; Stubee, 1998; Edstrom, 2005; Li, 2006). Li (2006) video recorded and micro-analyzed conversations of 40 Canadian and 40 Chinese participants who formed 40 dyads in four experimental conditions with roles of patient or physician. The study found negative correlations between backchannel responses and listener recall scores. Therefore, Li (2006) argues that

[...] back channel responses may have served as misleading feedback, thus preventing the information from being transmitted correctly. In these instances, it could be argued that the listener may have nodded to show '*i am paying attention*' but the speaker could have taken this to mean '*i understand what you are saying*'. (p.11)

To summarize, from the aforementioned studies it is clear that (1) backchannels serve an important and similar function in conversations across cultures for listeners to provide feedback to speakers, (2) backchannel devices, frequency, and context in discourse differ across cultures and (3) differences in use and perception can lead to misinterpretations or miscommunications during intercultural communication.

## 2.1 Conversational analysis research in specific contexts

Berry (1994) and Edstrom (2005) apply conversational analysis frameworks to the context of group conversations among women. Berry (1994) analyzes the turn-taking styles, with special emphasis on overlapping and backchannels, of American women and Spanish women between the ages of 25 and 35 living in the United States. The author hosted two separate dinner parties, one for four American women in English and one for four Spanish women in Spanish. During the dinner party, the conversations were recorded. Thereafter, the recordings were transcribed and playback interviews were conducted with each participant to investigate the assumptions behind the use of different turn-taking styles. Berry (1994) concludes that the use of backchannels and overlaps differs in English and Spanish causing an increased potential for cross-cultural misunderstanding in these areas.

Edstrom (2005) investigates the conversations of American women learning Spanish and Venezuelan women in Caracas. The participants were 13 Venezuelan and 14 American women aged 32 to 57. Data were collected from recordings of conversations at casual coffee parties, six of which took place at the home of a common acquaintance of attendees. One gathering in Spanish with four Venezuelan women served as the baseline for Spanish, one in English with four American women served as the baseline for English, and the other mixed gatherings were in Spanish. The groups were mixed and during analysis of the conversation data the relationship between participants was taken into consideration because it could influence both

conversation style and topics. After the conversations, participants completed a demographic questionnaire, were interviewed about their views of conversation and conversation style, and then analyzed a playback portion of a conversation in which they participated. Results are discussed taking into consideration Bennett's (1993) model of intercultural sensitivity. According to the model, intercultural development is divided into two categories: ethnocentric and ethnorelative. The ethnocentric category is subdivided into three steps: (a) denial (b) defense and (c) minimization. The ethnorelative category is subdivided into three steps: (a) acceptance (b) adaptation and (c) integration. Edstrom (2005) argues that Bennett's model relates to L2 conversation because both categories are developmental processes which occur on a continuum that is not only one-way. Furthermore, there is no guarantee the end of the continuum will be reached. Edstrom (2005) posits that

[t]he development of conversational skills can also be conceptualized as a process...characterized at one extreme by denial (or lack of awareness) of conversational realities and at the other by integration of first language (L1) and L2 conversational norms. Between those extremes are stages of defensiveness with regard to one's own conversational preferences and varying degrees of minimalization, acceptance, and adaptation of differences in conversational style. Broadly conceived, participation in L2 conversation is tied to issues of intercultural sensitivity, with an ethnocentric or ethnorelative orientation, and language skills. (pp.25-34)

Taking into consideration Bennett's (1993) model of intercultural sensitivity, Edstrom (2005) finds that the NNSs' participation in L2 conversations is influenced by familiarity with L2 conversation style, ability to accept differences in style, and topic of conversation. In addition, the American women interviewed reported that visiting Americans perceive Venezuelans to be angry when they talk. They referred to features of Venezuelan speech such as gestures, interruption, and simultaneous speech, which for Americans may indicate conflict or hostility and violate norms of 'harmonious interaction'. Edstrom (2005) argues that this misunderstanding arising from conversational style could also lead to a judgment of the character of the speaker. Venezuelan perceptions of American women were not specifically addressed in the study.

### **3 The present study**

#### **3.1 Motivation for the study**

Following Berry (1994) and Edstrom (2005), the present study seeks to explore the conversational styles and perceptions of American and Hungarian women ranging from age 24 to 35. The impetus for this research study is the author's personal experience living as an American woman in Budapest for 10 months and learning Hungarian. For the past ten months, I have crossed over between two main social spheres: the first is a progressive, feminist community of Hungarian women and the second is a group of independent, adventurous expatriate women. Each group hosts several social events per month including films, workshops, dinners, board game nights, pub quizzes, etc. There is a core base of women which frequently attend events, but there are many women whose participation is transitory. This creates a mix of friends, acquaintances, and strangers who interact at each event. The Hungarian group is conducted in Hungarian, but some participants also speak English as a second language. In my nine months attending events, I have only encountered one other American woman in the Hungarian group. In the expatriate group, the language of communication is English. There is a core group of American and British NSs, but

many members are NNSs of English. Although the group is mainly expatriates, there are a few Hungarians who have lived abroad or want to be part of an international community. A few American women in the expatriate group learn Hungarian. The expatriate group attracts working women, but, occasionally, students attend as well.

A third, much smaller sphere in which I have participated consists of people from other countries living in Budapest and learning Hungarian. This includes both students and working adults who study Hungarian full time or in their free time. During nine months in this sphere of learners of Hungarian, I have encountered only six other Americans who are conversationally fluent in Hungarian (approximately upper intermediate level or higher). There may be many others, but these are the only ones I have encountered at the two major language schools and the most popular language meetup group in Budapest.

My acquaintances in all spheres know I am learning Hungarian and that I often attend events in Hungarian and English. With many of my close friends and acquaintances we have discussed challenges learning Hungarian and trying to use it in conversations with locals with whom we interact frequently (neighbors, colleagues, classmates, etc.). A common anecdote I hear from Americans, even those with high levels of conversational Hungarian, is how puzzling they find conversations in Hungarian. Few of my American acquaintances have Hungarian friends with whom they converse in Hungarian; and they are often shocked that I do.

As the aforementioned research shows, conversations have been analyzed extensively regarding structure, language use, participant roles, and intercultural communication including L2 English speakers (or ELF speakers); little research, however, exists (in English) on Hungarian-American intercultural communication where all participants speak both languages. Markó, Gósy, and Neuberger (2014) do investigate prosody patterns of feedback in Hungarian, but it was not possible to locate any research related to perception, lexicalized backchannels, or the role of the listener in Hungarian conversation. As Edstrom (2005) argues, such research is essential to design pedagogical materials and teaching methods that assist learners in participating in L2 conversation with native speakers. This can aid both Hungarians learning English and English native speakers learning Hungarian. Therefore, the purpose of this study is to investigate L2 speakers' perceptions of conversational style in English and Hungarian in order to explore whether differences exist which may affect intercultural communication.

### 3.2 Research questions

The main research questions guiding the present investigation are as follows:

- RQ1: How do Hungarian NNSs of English and NSs of American English perceive the dynamics of conversation in English (volume, interruptions, overlaps, backchannels, simultaneous speech, gestures, eye contact, body language, etc.) which influence subtle judgments about speakers and listeners?
- RQ2: How do Hungarian NNSs of English and NSs of American English perceive the role of the listener in English conversations?
- RQ3: According to participant responses, which taught rules of conversation and/or communication strategies (in Hungarian or in American English) may influence the perception and judgment of speakers and listeners in conversation?
- RQ4: According to participant responses, what are the perceived differences between conversations in Hungarian and in English?

## 4 Methodology

### 4.1 Participant selection and groups

The data are from conversation recordings and semi-structured interviews conducted in the spring of 2019 in Budapest. Six women living in Budapest participated in the study; three are NSs of Hungarian and three are NSs of American English. Participants ranged in age from 24 to 35. Participants were carefully selected based on age, approximate language proficiency (upper intermediate level or higher in both Hungarian and English), and participation in one of the three spheres previously described (Hungarian women's group, expatriate women's group, or learners of Hungarian). Due to the criterion for inclusion, particularly the difficulty in locating American women who could speak Hungarian at an upper intermediate level or higher, the study could only include a small number of participants.

With the six participants three conversation dyads were created. Two dyads contained NSs of the same language and the third dyad was mixed. For the dyads which shared the same native language, care was taken to select participants who knew each other well enough to have had several conversations together before the data collection. The participants in the mixed dyad both knew the author, but did not meet before the study.

The first dyad contained NSs of Hungarian who knew each other from the Hungarian group. Proficiency in English was determined by personal interactions with the author and professional qualifications. At the time of the study, one participant worked as a researcher, publishing in English, and the other participant was an English teacher and doctoral candidate finishing her dissertation in English.

The second dyad contained NSs of American English who knew each other from the Hungarian learners group. Both participants had lived in Hungary for 2-3 years and studied in a Hungarian literary translation program in Budapest. At the time of the study both women in the NSs of American English dyad were preparing for a C1 Hungarian language exam.

The third dyad included one NS of Hungarian from the Hungarian women's group and one NS of American English from the expatriate women's group. The NS of Hungarian in the mixed dyad studied English at university which required a minimum of B2 level in English and worked as a Hungarian-English translator in a company.

The NS of American English in the mixed dyad worked as a teacher at a Hungarian high school and is a heritage speaker of Hungarian who lived most of her life in the United States. Henceforth, the NSs of Hungarian will be referred to as the NNSs and the NS of American English will be referred to as the NSs because the research was conducted in English. For the purposes of data analysis, all participants were given pseudonyms as seen in Table 1.

Dyad	Participant	Native Language
Hungarian Dyad	Erzsi	Hungarian
	Lili	Hungarian
American Dyad	Jessica	American English
	Samantha	American English
Mixed Dyad	Ági	Hungarian
	Amanda	American English

Table 1. Conversational dyads

#### 4.2 Procedures of data collection

Following Berry (1994) and Edstrom (2005), in order to promote as authentic of conversation as possible, each dyad met together in a familiar setting with the researcher present. The NNS Hungarian dyad met in an apartment of one of the participants and the NS American dyad met at a university both participants knew. The mixed dyad met in the apartment of the researcher. Each dyad was invited to participate in a gathering with coffee and conversation, similar to previous settings where participants met with one another or the researcher. The researcher asked permission to record the conversations and informed participants that privacy will be ensured and all data will remain anonymous. The recording was started at the beginning of the gathering.

The researcher participated minimally in the conversation and only contributed when prompted by the participants, such as with a question. The conversation in English served as a stimulus to help participants transition into “English mode” before the semi-structured interviews.

After each conversation, the researcher conducted and recorded a semi-structured interview separately with each participant. The semi-structured interview contained adapted questions from Edstrom (2005) (see Table 2).

<b>Semi-structured Interview Questions</b>
Part 1:
1. Describe a typical conversation with your female friends who are native speakers.
2. Under what conditions might the conversation be more/less animated or louder/softer in volume?
3. What conversational behaviors do you consider rude?
4. When is it acceptable and when is it not acceptable to interrupt another speaker?
5. How do you feel when you are interrupted?
6. When is it acceptable for multiple people to speak at the same time?
7. How do you feel when multiple people speak at the same time?
8. What expressions do people use in English to show that they are listening?
9. How does one know if those expressions are being used sincerely?
Part 2:
10. What have you been taught to do, and not do, in conversation?
11. Why are those practices desirable or undesirable?
12. What are conversational interactions like in your family?
13. Have you ever conversed with a Hungarian/an American?
14. How does that conversation compare to interactions you have with native speakers?
15. How would you feel participating in an L2 conversation with several native speakers of your L2?
16. What factors would make the experience easier and what factors would make the experience harder for you?

Table 2. Semi-structured interview questions (based on Edstrom, 2005)

### 4.3 Data analysis

Since the recordings of the conversations served as a stimulus to help participants transition into “English mode” before the semi-structured interviews, they will not be analyzed in detail in the current paper. The data from the semi-structured interviews will be summarized and analyzed taking into consideration the previously reviewed literature. To protect the anonymity of participants, entire interviews were not transcribed. There were several portions of interviews which referenced sensitive topics, such as family history, which were not directly related to the research questions. Based on the discretion of the researcher these were omitted from analysis. Question responses were transcribed with the aid of notes taken during the conversations and interviews and the recordings of the interviews. Summary tables for each question were then created. Thereafter, responses were analyzed with reference to the research questions. When responses were vague, the interviews were cross-referenced with recordings and notes from conversations for clarification (of behaviors, elements of conversation, references to body language, etc.). Finally, a simple logical analysis looking for similarities and differences between responses was conducted.

## 5 Results

In the semi-structured interview (SSI), questions 2, 4, 5, 6, and 7 address RQ1, questions 3, 8, and 9 address RQ2, questions 10, 11, and 12 address RQ3, and questions 13, 14, 15, and 16 address RQ4. The findings will be presented below in the order in which the research questions were raised.

### 5.1 RQ1: Perceptions of the dynamics of conversation

#### 5.1.1 Conversational style: animatedness and volume

NS participants responded that these elements of conversation fluctuate with emotion, interest in topic, trying to catch the attention of listeners, and joking. NNS participants responded that these elements vary based on emotion, whether there is an argument, or interest in shared topic (such as during story telling). Ági stated,

I don't think I've had enough English conversation to know the difference. Perhaps it's the same as Hungarian. You speak quieter if you are in an environment where you have to be careful that others aren't bothered by you.

#### 5.1.2 Acceptable and unacceptable interruptions

The NS participants responded that it is acceptable to interrupt once the listener has something relevant to what the speaker is saying to contribute to the conversation. Two participants, Jessica and Amanda, noted, however, that this is only acceptable if the speaker has finished what she would like to say or if there is a chance to finish the thought after the interruption. Samantha responded that it is acceptable to interrupt if there is something that requires immediate action or if the topic of conversation is important and the listener interrupts to put the speaker back on the right track or suggest something. On the other hand, one NNS, Ági, stated that interruptions are acceptable only when talking time and number of interruptions is equally distributed among participants in the conversation; otherwise, interruptions are only acceptable to discipline a speaker who is taking up too much space in the conversation. The two other

NNSs, Lili and Erzsi, reported that it is acceptable to interrupt in cases where the listener is so excited about the topic that it is not possible to wait to be part of the conversation or when telling shared stories to which all participants are excited to contribute.

### 5.1.3 Affective influence of interruptions

Connected to the response of the previous question, NS participants reported being annoyed or upset if the interruption is a “rude” interruption or not based on the topic of the conversation (if the interruption changes the topic). NS participants emphasized that if they were able to finish what they were saying after the interruption, it did not bother them. Among the NNSs, the reaction to interruptions was more negative. Erzsi stated, “I’m very sensitive to that. I feel very bad.” Similarly, Lili remarked, “I don’t like it, it makes me want to stop and not talk again.” On one hand, Ági said that interruptions caused by excitement about the topic don’t bother her, and can even be flattering. On the other hand, she explained that interruptions can also feel like the listener does not care and be hurtful.

### 5.1.4 Acceptable and unacceptable simultaneous speech

Jessica responded that simultaneous speech is always acceptable, whereas Amanda specified that it must be in a conversation without too many critical points or one about giving opinions about something (for example, the color of a clothing item). Samantha could not think of a situation in which it would be acceptable. Samantha expressed that conceptually when multiple people speak at the same time they actually create multiple smaller side conversations separate from the main conversation. Lili and Ági noted that it is acceptable for multiple people to speak at the same time when telling a group story or reacting to the conversation. Erzsi believed it was unavoidable in big group conversations, but added the caveat that it is only acceptable if no one is silenced or excluded. Ági echoed this opinion by stating that outside of reactions, multiple people speaking at the same time is not acceptable if it creates a situation in which everyone cannot speak or be heard.

### 5.1.5 Affective influence of simultaneous speech

NS participants remarked that their feelings related to multiple people speaking at the same time fluctuate based on contextual factors including setting, people in conversation, etc. Ági declined to respond to this question due to “lack of experience”. Erzsi and Lili, both friends in the Hungarian conversation dyad, reported having mixed feelings similar to the NSs. Erzsi stated, “Sometimes I feel lost, because I have these issues with getting myself heard.” Thereafter, she clarified that it also depends on the group. In some cases it can be funny or involve intense emotions that can joyful, interesting, or funny to experience as a group. Lili responded to the topic on a linguistic rather than emotional level:

Generally, I don’t like it, because it makes it harder for me to get what they are trying to communicate. They tend to speak faster to ‘compete’ with each other, which makes it much more difficult for a non-native to follow the thread.

## 5.2 RQ2: Perception of the role of the listener in English conversation

### 5.2.1 Rude conversational behaviors

As shown in Table 3, NSs and NNSs consider various behaviors rude. In terms of similarities, four out of the six participants reported interruptions to be rude. Almost all of the behaviors listed are judgments of listeners, not speakers, in conversations. Only 4-5 out of 18 behaviors reported occur when in the role of the speaker during conversation. These speaker behaviors included swearing, lack of eye contact, unequal distribution of speaking time, and only talking about themselves (or lack of interest in others' opinion). The other behaviors judged to be rude are associated with the role of the listener. It is also interesting to note that only the NSs indicated a lack of "active listening", minimal responses, or lack of asking questions to be rude behaviors on the part of the listener.

Semi-structured Interview Question	3. What conversational behaviors do you consider rude?
Jessica	<ul style="list-style-type: none"> <li>• One word responses</li> <li>• When people don't ask questions</li> <li>• When it feels one-sided (unequal distribution of speaking time)</li> <li>• When they only talk about themselves</li> </ul>
Samantha	<ul style="list-style-type: none"> <li>• Not paying attention when someone is talking</li> <li>• Interrupting with an unrelated idea</li> <li>• Interrupting and changing the subject</li> <li>• Cutting someone off with a story to say something completely unrelated</li> </ul>
Amanda	<ul style="list-style-type: none"> <li>• Interrupting</li> <li>• Not actively listening, so someone has to repeat 2-3 times</li> </ul>
Erzsi	<ul style="list-style-type: none"> <li>• Interruptions</li> <li>• Not looking at the person who is talking</li> <li>• Talking over one another</li> <li>• Turning your back and excluding someone from the circle</li> </ul>
Lili	<ul style="list-style-type: none"> <li>• Interruption</li> <li>• Lack of interest in the others' opinion</li> <li>• Lack of eye contact</li> </ul>
Ági	<ul style="list-style-type: none"> <li>• Swearing</li> <li>• Considers same things rude in Hungarian and English</li> </ul>

Table 3. Rude conversational behaviors

### 5.2.2 Listener feedback expressions

SSIQ8 addresses the ways that listeners give feedback to the primary speaker. As indicated in Table 4, although the question asks for "expressions", many participants indicated not only verbal feedback (backchannels or reactive tokens), but also different forms of body language. NS and NNSs highlighted similar backchannel expression and body language used by listeners.

Semi-structured Interview Question	8. What expressions do people use in English to show that they are listening?
Jessica	<ul style="list-style-type: none"> <li>• “uh huh”, “ok”, “really”, “seriously”, “oh my gosh”</li> <li>• asking follow-up questions or clarifying question</li> </ul>
Samantha	<ul style="list-style-type: none"> <li>• “yeah”, “I know”, or make some noise like “uh, huh”</li> </ul>
Amanda	<ul style="list-style-type: none"> <li>• Being attentive</li> <li>• Looking at person who is speaking</li> <li>• Not multi-tasking or fidgeting</li> <li>• Nod head and say “mhmm”, “yes”, “I understand”, “Right”, “Ok”</li> </ul>
Erzsi	<ul style="list-style-type: none"> <li>• Saying “I see”, “mmhmm”, “sure”</li> <li>• Nodding.</li> <li>• Looking at the person</li> </ul>
Lili	<ul style="list-style-type: none"> <li>• “I understand what you’re saying”, “I see”, “Really?”, “OMG”, “That is awesome”, “Tell me more about it”</li> </ul>
Ági	<ul style="list-style-type: none"> <li>• Saying “yeah”, “ok”, “I see”, etc. to show you are listening</li> <li>• Saying “oh no”, “that’s cool”, “interesting”, etc. to show your reaction</li> <li>• “Maybe in English conversation there isn’t as much this humming sound. In Hungarian we often say like ‘mmm’. “</li> </ul>

Table 4. Listener feedback

### 5.2.3 Sincerity of feedback expressions

There was no major difference in the responses given by NSs and NNSs. Most participants indicated that appropriate body language including eye contact and gestures such as nodding needed to accompany expressions. Body language such as looking around the room, fidgeting, or being on the phone was considered an indicator of insincerity. In addition, the expression type must match what the speaker is discussing, must be used at the right moment in the conversation, and must be said at the appropriate volume (must vary in volume based on context). One NS and one NNS both addressed the difficulty in determining whether the expressions are used sincerely. Samantha stated, “It’s hard to know with Americans if they’re being sincere or not.” Lili also remarked, “You never know with an American.”

### 5.3 RQ3: Taught rules and/or strategies of conversation

RQ3. Which taught rules of conversation (in Hungarian or in American English) may influence the perception and judgment of speakers and listeners in conversation?

SSIQs 10, 11 and 12 attempt to address RQ3 by exploring rules of conversation which participants can consciously remember learning while growing up or from their families. Table 5 below shows the responses to SSIQ10, the first relevant question to address RQ3, which relates to rules that are taught. Based on these responses, there do not seem to be any noticeable patterns among responses that would indicate major differences related to native language or culture. SSIQ11 follows-up by asking why such practices are desirable or undesirable. Several participants from both languages responded that the rules are important in order to show respect to the speaker.

Semi-structured Interview Question	10. What have you been taught to do, and not do, in conversation?
Jessica	<ul style="list-style-type: none"> <li>• Eye contact</li> <li>• Active listening</li> <li>• Can only interrupt or disagree with peers, can't do it with older people or people of higher rank</li> </ul>
Samantha	<ul style="list-style-type: none"> <li>• Not being on your phone</li> <li>• Listen if they're trying to say something important. Once they finish you don't just respond about something else, but you give feedback with a comment or question about what they said.</li> </ul>
Amanda	<ul style="list-style-type: none"> <li>• Don't look at ground</li> <li>• Be polite</li> <li>• Ask questions in full sentences</li> <li>• Confirm when you're understanding or not</li> <li>• Know how to form question based on who you're speaking to</li> </ul>
Erzsi	<ul style="list-style-type: none"> <li>• Not to interrupt</li> <li>• Don't be disrespectful by using words like "stupid"</li> <li>• Argue with the other person's argument, not critiquing their character.</li> </ul>
Lili	<ul style="list-style-type: none"> <li>• Not to interrupt</li> <li>• To make eye contact</li> <li>• To listen to the other</li> </ul>
Ági	<ul style="list-style-type: none"> <li>• Try to listen, don't interrupt too much</li> <li>• Don't use swear words</li> <li>• Don't be too animated, loud, or use too many gestures, but depends on who you're talking to</li> <li>• Show you are listening with like "mm"</li> </ul>

Table 5. Taught rules and/or strategies of conversation

Additionally, the rules are important to be polite, show understanding, and help the conversation continue. Only Ági indicated that not swearing was important in order to be seen as an educated individual and that not speaking too loud was important in order to not bother others. SSIQ12 asked about conversational interaction in the participant's family. In responses, most participants linked previous comments about conversational style, behavior, and rules back to interactions they had as children in their families. Although participants indicated an awareness of how their family interactions influenced their perception of conversations, they also emphasized that as they grew up their role as a participant in the conversation changed (to be allowed to speak more or interrupt, rather than just listen) and so did the rules once they began having conversations with primarily non-family members.

#### 5.4 RQ4: Perceived differences between Hungarian and English Conversation

The semi-structured interview attempted to address RQ4 from several different angles, directly, as in questions 13 and 14 or indirectly, as in questions 15 and 16. SSIQ14 directly asks participants to compare their interactions with NSs and NNSs. As seen in Table 6, responses show that participants had difficulty separating comments

about conversations that happened in English and conversations that happened in Hungarian. Instead, participants responded regarding the behavior of Hungarians and Americans without always specifying if the behavior was specific to the language of communication. Responses alternate between discussing the participant's own behavior in the interaction or the behavior of the other people involved.

<b>Semi-structured Interview Questions</b>	<b>14. How does that conversation compare to interactions you have with native speakers?</b>
Jessica	<ul style="list-style-type: none"> <li>• I police what I say more often with Hungarians (talk slowly, more clearly, more formal). Conversations are more “stilted”.</li> <li>• They do a different filler sound “uh huh” or just quietly nod their head. Maybe in general less active than I would judge Americans to be.</li> </ul>
Samantha	<ul style="list-style-type: none"> <li>• It is different because...I'm not exactly sure why.</li> <li>• Native speakers [of English] talk in such a way that they are looking for a certain response</li> <li>• With Hungarians it's much more black and white. For example, 'how are you?' question and ironic statements being taken seriously.</li> </ul>
Amanda	<ul style="list-style-type: none"> <li>• Hungarians use different types of words to say the same thing. They use a wider range of vocabulary (in Hungarian).</li> </ul>
Erzsi	<ul style="list-style-type: none"> <li>• It's just inherently difficult to talk in English, so I always feel relieved to talk in Hungarian.</li> <li>• Groups of friends who talk in Hungarian and in English do not have big differences.</li> <li>• In general or in more formal situations, I've always had the sense that if it's in English it has to be more polite. People would say a lot of expressions out of courtesy.</li> </ul>
Lili	No response.
Ági	No response.

Table 6. Differences in interactions with NS and NNSs

SSQII5 asked how participants would feel participating in an L2 conversation with several native speakers. Jessica and Samantha highlighted that they more frequently have conversations in Hungarian with other foreigners than with locals. Jessica clarified that when she speaks Hungarian with native speakers it is usually in service encounters; but speaks in English with most of her Hungarian friends. NSs also indicate they have trouble taking turns in the conversation, making jokes, or talking about higher level topics in Hungarian. Regarding her feelings about conversing in the L2 (Hungarian) with native speakers, Amanda states simply, “I feel like I'm a 5 year old who never learned to speak adult language.” Rather than causing anxiety or worry for learners, in each interaction with Hungarians American participants simply switch to English as the language of communication when problems arise.

Semi-structured Interview Questions	16. What factors would make the experience easier or harder for you?
Jessica	<ul style="list-style-type: none"> <li>• If they stop and directly ask me questions that would be easier.</li> </ul>
Samantha	<ul style="list-style-type: none"> <li>• If my grammar was better</li> <li>• Sometimes it's hard...I usually don't want people to take me literally when I talk. Sometimes in Hungarian I think things get taken literally that I didn't intend to get taken literally.</li> <li>• I think Americans complain a lot to make the other person feel comfortable (about the weather, or school). I think in Hungarian that's different.</li> </ul>
Amanda	<ul style="list-style-type: none"> <li>• Understanding a lot of Hungarian adult slang or knowing more description words</li> <li>• Someone telling me the topic and then words associated with the topic</li> </ul>

Table 7. Factors influencing conversation with Hungarian native speakers

The NNSs, when discussing conversation in English, mainly mention personal factors that inhibit them from participating such as anxiety about speaking in English and lack of confidence in their ability to understand or speak quickly enough while conversing with NSs. As a follow-up, SSIQ16 asked participants which factors would make the experience of participating in L2 conversations with native speakers easier or harder. Responses vary by individual (see Table 7 and 8), but several factors mentioned were linguistic proficiency, conversational style, personality, and topic of conversation.

Semi-structured Interview Questions	16. What factors would make the experience easier or harder for you?
Erzsi	<ul style="list-style-type: none"> <li>• English will always be harder, because I'd never reach the same proficiency in English as I have in Hungarian.</li> <li>• I wish native speakers would be more attentive with non-natives to see if I understand. Native speakers don't have awareness of the non-native listener who may be struggling.</li> <li>• Learning about professional topics that in themselves require skills or knowledge that I may not have had.</li> </ul>
Lili	<ul style="list-style-type: none"> <li>• Easier if other people in group are similar in personality</li> <li>• Easier to talk to introverts because they don't dominate the conversation as much</li> </ul>
Ági	<ul style="list-style-type: none"> <li>• Easier if there were less native speakers</li> <li>• Easier if everyone made some language mistakes</li> </ul>

Table 8. Factors influencing conversation with English native speakers

## 6 Discussion

The results of the study show many similarities in the perception of conversational style and the role of the listener in Hungarian and in English conversation. Interviews

demonstrate that most participants have similar perceptions about conversational style in English regarding volume, simultaneous speech, and backchannels. The backchannels and listener feedback reported in the current study support previous findings related to listener feedback in terms of backchannel expressions and body language. Regardless of native language, participants also had similar perceptions of what a good listener in a conversation should do. The answers to questions regarding taught rules of conversation and family interactions helped to better understand what shapes the perception of conversation, but were not remarkably different across cultures.

The findings suggest that participants perceive interruptions differently based on native language and culture. The NNSs described negative feelings associated with interruptions. NSs, however, provided a deeper description of when interruptions are acceptable and unacceptable. NSs verbalized several factors which influence whether they perceive interruptions to be negative. The first set of factors is related to the content of the interruption. If the interruption is extremely relevant to the current topic, immediate in nature, or encourages the primary speaker to continue in some way (by a question or suggestion to guide conversation), then it is acceptable. The second set of factors relates to the purpose or 'outcome' of the interruption. If the interruption is irrelevant in such a way that it changes the topic of the conversation or inhibits the primary speaker from finishing the thought, then it is an unacceptable interruption. Outside of these specific contexts, NSs appear to have a higher tolerance of interruptions than NNSs. It is not clear whether NNSs simply did not provide as much detail in their answers or if they are unaware of these pragmatic rules which influence the NSs perception of interruptions. Perception of interruptions in both English and Hungarian could be an area for future research.

Data from the semi-structured interviews also suggest that the role of the listener is perceived slightly different in English and in Hungarian. American NSs referred several times to 'active listening' or the necessity to explicitly comment or ask follow-up questions in order to be a good listener. NNSs seemed to be aware of this type of listening as well based on their ability to list several backchannel expressions used to give feedback. In comparing the languages, Jessica stated: "They [Hungarians] do a different filler sound 'uh huh' or just quietly nod their head. Maybe in general less active than I would judge Americans to be."

Ági seemed to make the same observation when she stated, "Maybe in English conversation there isn't as much this humming sound. In Hungarian we often say like 'mmm'." These comments suggest that the role of the listener is to be more active in English using not only non-lexical backchannels, but also phrasal and substantive backchannels. Future research could explore the type, frequency, and locations of backchannel use in Hungarian in order to provide a more detailed comparison with English that may affect perception and intercultural communication.

The data collected through participant observation, recorded conversations, and semi-structured interviews did not directly uncover many differences in conversational style, but it may have revealed a possible effect of cultural differences or lack of linguistic proficiency: avoidance. The NSs of American English clearly expressed that they speak in Hungarian more often with foreigners than with native speakers of Hungarian. In some cases, this was out of consideration for other members of the friend group who did not speak Hungarian. In other cases, it was a direct result of a lack of linguistic proficiency. When speakers of American English encounter mixed linguistic groups or gaps in their knowledge, the solution reported by participants was to switch to English. Although in this way they may avoid the linguistic and pragmatic differences related to their own knowledge of Hungarian, they do encounter some difficulties which could influence intercultural communication. Jessica described these conversations as 'stilted' because she polices what she says by taking care to

talk slow, speak clearly, or be formal. Samantha noted difficulties speaking with native and non-native speakers. With native speakers, she says they search for a 'certain response' and with non-native speakers she notes that what she says is sometimes taken too literally. In sum, in response to linguistic proficiency (of the participant herself or other in the conversation) the Americans interviewed speak Hungarian with non-Hungarians and English with Hungarians.

The Hungarians interviewed also indicated a certain level of avoidance regarding conversations in the L2 with native speakers. Ági captures this beautifully as she responded, with hesitation, to the question concerning what would make L2 conversation with native speakers easier:

This is going to sound bad... maybe if they were not native English speakers it would be easier to talk to them. Like if everyone was making mistakes, I would feel more comfortable with my pronunciation.

Similarly, Erzsi expressed that she wished native speakers would be more attentive with non-native speakers to see whether or not the non-native speakers understood. Furthermore, she observed that native speakers don't have awareness of the non-native listener who may be struggling. In the case of native speakers of Hungarian, it is not always an option to switch to their native language in order to clarify when such difficulties in understanding language or culture arise. Perhaps this explains why it may be easier to communicate in English with non-native speakers who struggle with the same issues and have a higher level of awareness.

## 7 Conclusion

Based on the findings of this study, it may be argued that perceptions of NNs and NNSs of American English and Hungarian may differ slightly concerning the conversational style and the role of the listener in Hungarian and English. The study suggests that perceived differences do affect behavior in conversations, but another important factor is linguistic proficiency. Even if participants are aware of differences, it is not always certain that they can enact their pragmatic knowledge linguistically. In cross cultural and intercultural communication it is not only pragmatic awareness that is necessary, but also awareness of the language proficiency of the other members in the conversation. Future studies can explore this area by conducting research in Hungarian about the Hungarian language with Hungarian and American speakers of English.

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PART III

AUSTRALIAN STUDIES: ITS HISTORY IN HUNGARY AND CULTURE-  
ORIENTED EXPLORATIONS



## DIGITAL DISRUPTION AND CO-CREATING AUSTRALIAN STUDIES

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### Abstract

In the early 1990s, designing curricula was a fundamentally different exercise to what it is today: teaching was face-to-face, resources were print-based, overhead projectors were state of the art in lectures, while VHS had only recently taken over from Betamax videos. Computers were little more than text editors, as floppy disks gradually reduced in size from eight inches to three and a half. Compact disks vied for supremacy with vinyl in music stores, not as storage devices, while DVDs had not yet been invented. I had arrived in London in August 1989 to work at the Menzies Centre in the midst of immense transformations in the world. Less than twelve months into the job, I received a call from the Australian Ambassador in Budapest with a request to scope the prospects of mounting Australian Studies programs at Hungarian universities. The present article gives an overview of the development of Australian Studies and compares what it was like to teach an Australian Studies course in Hungary then and what it is like today.

Each Wednesday at 8.00 pm Australian Eastern Standard Time - across thirteen weeks of Semester 1 2019 - Dorka, a shift worker from Geelong (Victoria), joins a small Webinar group studying *Banned Books*, as part of her Australian Studies at James Cook University, along with Veronika, Bernard, Zoltan, Gizella and Agnes from Cairns and Townsville (Queensland), Cecilia who completes a six hour round trip from her work on an outback mine site to login from her home at Broken Hill (New South Wales), Douglas who resides in Canberra (Australian Capital Territory), Werner who lives in Darwin (Northern Territory), Agnes from Kangaroo Island (South Australia), Giovanna from Launceston (Tasmania), and Glenda from Fremantle (Western Australia).<sup>1</sup> These Australian-based students might have just as readily logged on from anywhere in the world - for example, Budapest, Berlin and Barcelona - where Australian Studies are taught in Europe. Our online discussions are animated and typically run longer than the allocated hour. Those unable to meet online at the appointed time join in a discussion board and appear to be similarly motivated.

At our week six meeting, Dorka informs the group that she intends writing her term paper on the banning in Australia of DH Lawrence's *Lady Chatterley's Lover*, Veronika is exploring the prohibition of comics, magazines and pulp fiction, Bernard is investigating the trial, guilty verdict and imprisonment of the novelist Robert Close for criminal obscenity, Gizella is interested in the banning of Gore Vidal's *Myra Breckenridge*, Zoltan is testing definitions of sedition against the banning of JM Harcourt's communist

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<sup>1</sup> Aliases used.

novel *Upsurge* for indecency, Agnes is examining the banning of Jean Devanny's *The Virtuous Courtesan*, Douglas is assessing the filtering of books for young readers by libraries and schools, Cecilia is inquiring into the banning of Nabokov's *Lolita* which, unlike *Lady Chatterley's Lover*, does not contain a single "offensive Anglo-Saxon four letter word", Werner is bemused by the prohibition of Hemingway's *A Farewell to Arms*, Agnes is tracing legal definitions of criminal libel in the trial of Frank Hardy's *Power Without Glory*, Giovanna is undertaking a study of non-violent erotica in a comparative analysis of film classifications, while Glenda is delving into the dark web. Although the class is small, these meetings double as a site for testing strategies in digital learning, which has been a feature of higher education for twenty five years.

*Banned Books* is one of a suite of new subjects I teach at James Cook University in 2019. Each has been designed with digital literacy in mind, including *Modern World History*, *Time Traveller's Guide to Australia*, *Modern Australia*, *Crime and Punishment* and *War and Peace*. The subjects are scaffolded by 130 lectures and a similar number of podcasts, face-to-face and online seminars, online quizzes and discussion boards. Two-hour consultation periods are set aside each week for in-office, Skype and Zoom meetings. My preliminary observations are that standards and engagement are better than in previous years and that participation and retention rates are up, leading to tentative speculation that the online student experience has been enriched.

Phase two of the digital strategy involves a plan of encouraging students to submit assessment items for possible online publication (for example, through <http://blog.naa.gov.au/banned>), creating digital content for peer review in the form of blogs and vlogs, the selective release of podcasts as a means of marketing the subjects beyond the University, and a longer-term ambition to introduce interactive games as part of the subjects' design and delivery. An early adopter of digital technologies through the co-creation and management of the Australian Public Intellectual Network between 1997 and 2011 (archived at <http://www.api-network.com>), I remain ever alert to digital transformations and disruptions.

In 1990, following enquiries from Eötvös Loránd University and the University of Debrecen via the Australian Embassy in Budapest, I set about co-creating Australian Studies programs within the Hungarian Higher Education Sector. The fall of the Berlin Wall the previous November and Velvet Revolutions across former Warsaw Pact countries had animated optimism globally in the wake of earlier disillusionment triggered by the Tiananmen Square massacre in June 1989. Our initially cautious readiness to believe that the world might be changing for the better was buoyed up in February 1990 by the release of Nelson Mandela from Robben Island Prison after twenty seven years of incarceration in Apartheid South Africa. I had arrived in London in August 1989 to work at the Menzies Centre in the midst of these transformations. Less than twelve months into the job, I received a call from the Australian Ambassador in Budapest, Hon Douglas Townshend, who requested that I scope the prospects of mounting Australian Studies programs at Hungarian universities.

Arriving in Budapest for the first time in December 1990, I witnessed firsthand the seismic political and historical shift that was underway. Retreating Soviet garrisons rumbling along the city's wide boulevards provided assurance that the Cold War was coming to an end. Beginning in March 1990, the last of the long convoys was despatched by mid-1991. Out of sight of these awe-inspiring scenes, an entirely different revolution was about to sweep aside many of the most stable of assumptions of twentieth century modernity. In March 1989 the World Wide Web was announced, though very few, even Microsoft's Bill Gates, comprehended the significance of what was about to transpire. Commercialisation of the internet five years later in 1994 marked the beginnings of the Fourth Industrial Revolution. Now-familiar terms of digital education, like blogs, vlogs, Skype and Zoom would have seemed like nonsense-speak as we made our first tentative efforts to establish

Australian Studies in Hungary. In a special issue of *Hungarian Studies in English* given over to the development of Australian Studies and published in 1992, I cited an entirely different order of global communications influences that contributed to the “breaking down of national borders”. Satellite television channels such as “MTV, CNN and Sky predominate[d] through satellite dishes across Europe” and significantly challenged Soviet influence in the region. I might also have mentioned media magnate Robert Maxwell’s efforts to establish a continental English-language newspaper – *The European* –, which was published between May 1990 and December 1998 (Nile, 1992, p.18).

Communications scholar Geoffrey Kirkman famously observed in 1999 that over half the world’s population had never yet made a phone call. He was talking about landlines. A mere two decades later, in 2019, two thirds of the world’s people (4.7 billion or 63%) owned mobile phones (Mobile Phone Users Worldwide); around 60% had internet access (Internet Users Worldwide). While a digital divide continued to be evident (80% take-up in the Global North), mobile coverage extended to more than 90% of all people globally (May, 2011), with 60% accessing the internet via mobile devices (Mobile Users Worldwide).

More than 5.5 million Hungarians owned smart phones by 2019, while 80% of the population enjoyed internet access (Internet Users Hungary). By this time Australia recorded 22 million internet users and 20 million mobile phone subscribers, of which 85% possessed smart devices (Mobile Phone Users Australia). As elsewhere, the impact on Australian Higher Education continues to be profound. “Like every other sector of the economy, Australia’s universities are facing the forces of disruption,” observed Jack Goodman, Founder and Executive Chair of the online company Studiosity, citing a survey of students which indicated that as many as one in five believed that physical campuses were unlikely to exist in twenty years. “To continue to thrive and deliver value to the nation,” Goodman observed, Australian Universities would “need to find new ways to attract, support, and retain students” (Nadalin, 2018). Flipped classrooms and blended learning approaches were consequently adopted along with new curriculum and pedagogical strategies designed to take advantage of digital learning.

Digitalisation of the GLAM (Galleries, Libraries, Archives, Museums) sector led to the development of systems capable of delivering holdings to screens everywhere. Among the forerunners, the National Library of Australia developed Trove as a fully searchable online archive of Australian newspapers and magazines, covering the period from the early 1800s to the mid-twentieth century, which by July 2019 comprised more than 23 million pages. The National Archives of Australia digitised the service files of more than a million military personnel from the First and Second World Wars. Using these and similar capabilities across a broader range of institutions and resources, Griffith University’s “Prosecution Project” linked criminal court records over a century to 1960, cross referenced against newspaper accounts and other archives, while the University of Tasmania’s “Founders and Survivors Project” mapped convict and criminal records against Births, Deaths and Marriages, war service records, and newspapers. In the literary field, the University of Queensland-led Austlit Database, which began as a print-based bibliography at Monash University, was transformed into a fully searchable online resource that networked Australian literary production, authorship, and reception.

Noting the impact on the study of Australia, President of the Australian Academy of Humanities Professor Joy Damousi observed in 2018:

In a time of artificial intelligence, precision medicine, globalisation and social change, discussion of our national future depends on informed ethical, historical and cultural perspectives provided by [the] humanities, arts and social sciences ... New technologies and developments promise to transform our engagement

with our past and our present ... unlock and connect the vast rich record of cultural and social life in Australia. (National Research Infrastructure, 2018)

Yet, for all its potential, digitisation also represents perceived threats to brick-and-mortar institutions. In his "essay" *The Idea of the Australian University* (Davis, 2017), University of Melbourne Vice Chancellor Glynn Davis provocatively suggested that as many as three quarters of Australia's current "path dependent" Universities may not survive the half century to 2070 (p.18). Contrary to Davis' position, Australian Universities have existed in a state of dynamic change since at least the Dawkins reforms in the late 1980s and been agents for social and cultural transformation since at least the establishment of the Australian Universities Commission thirty years earlier in the mid-1950s and the publication of the LH Martin Report in 1964. Like virtually all Universities worldwide, Australian Universities have redoubled their efforts to be primary institutions of the digital knowledge economy.

Flipped classrooms established the potential for deploying virtual and augmented educational content (for example, the 3D Gallipoli App <https://www.abc.net.au/www-anzac/gallipoli>), while borderless education allows for the co-development of rich integrated digital ecosystems that exist independently of location. Obvious recent developments include Massive On-Line Open Courses, TEDx Talks and Conferences, podcasts, and mobile screen technologies capable of receiving myriad interactive content through simple apps for students everywhere, while blockchain technologies suggest new relationship models between institutions, and between teachers and learners, opening up further potential for partnership learning and co-creation.

Triangulating traditional communications through Budapest, London and Canberra, telephone, faxes and post maintained our vital connection in the early 1990s. Each workday morning, I raced across Bloomsbury to my Russell Square Office to marvel at the flow of faxes from other time zones: Canberra ten hours and Budapest one hour ahead of London. Securing library donations was the most pressing and urgent task for ensuring the success of the initiative. The Australian publisher Angus & Robertson came to the party with books, while grants from the Australian Embassy in Budapest and the Menzies Centre provided much needed funding to purchase select titles from the Australian Bookshop in Woburn Walk, London. A further grant allowed for the employment of Glenda Sluga, Oxford postgraduate and subsequently Professor of History at the University of Sydney, to facilitate on-site teaching at Eötvös Loránd University (ELTE) Budapest and Debrecen University. Professor Andrew Reimer from the University of Sydney mobilised his networks to assist in these efforts, while Professor Peter Spearritt, Director of the Monash National Centre for Australian Studies and Professor Chris Wallace-Crabbe, Director of Melbourne University's Australian Centre, provided essential institutional support.

At that time, there were two major Australian centres at Monash and Melbourne, with longer-established centres at the University of Queensland and Curtin University. Griffith University possessed significant teaching and research expertise and, along with Melbourne and Monash, employed a dedicated Professor of Australian Studies. The major European Centre was the Menzies Centre at the University of London, with teaching and research programs the length of Europe - from Aarhus in the north to Lecce in the south. With a substantial presence in Austria, Denmark, France, Germany, Italy, Spain and Switzerland, and emerging interests in Slovakia, Poland and Serbia, Hungarian Studies on Australia would contribute significantly to expansion across Central and Eastern Europe. The Menzies Centre's visiting scholars program provided the opportunity for senior Australianists to include Hungary on their travel itineraries. Dennis Altman, Bruce Bennett, Chris Wallace-Crabbe, Ann Curthoys, John Docker, Ken Inglis, Marilyn Lake, Andrew Reimer, Henry Reynolds, Portia Robinson, Peter Spearritt and James Walter, among others, made visits to ELTE where they were greeted by

Dorottya Holló, who anchored the teaching program. Former minister, Australian Senator Margaret Reynolds also visited as part of the initiative.

Towards the end of 1992, after convening a successful Australian Studies Conference at ELTE called *Australian Civilisation*, I returned to Australia to head up the Australian Studies Centre at the University of Queensland. Soon after arriving at the St Lucia campus, I hosted meetings which led to the creation of the International Australian Studies Association (InASA). The inaugural InASA president was James Walter, Professor of Australian Studies at Griffith University and former Head and Professor of Australian Studies at the Menzies Centre. Five years later, the University of Newcastle appointed Lyndall Ryan as Australia's fourth Professor of Australian Studies. Professor Ryan had begun her professional life in the mid-1960s as a research assistant on Manning Clark's six-volume opus *The History of Australia*. Half a century on, Professor Ryan and a team of scholars through the Centre for Twenty First Century Humanities co-created a digital resource that revolutionised understandings of colonial violence through the development of an interactive map of more than 250 massacre sites across Australia.

When Professor Ryan began her career as a research assistant in the 1960s, it was within the context of the singular vision of a single individual scholar: the sole named creator of C. M. H. Clark's *The History of Australia* and, since 2015, the centenary of the author's birth, Manning Clark's *The History of Australia*. By contrast, twenty-first century digital projects like the *Massacre Map* became genuine sites of co-creation that provided extraordinarily rich and authentic experiences and opportunities for students of Australian Studies. At the same time, social media became a tool in undergraduate teaching and research supervision (Minocha & Petres, 2012), in addition to specifically tailored educational software. Australia's National Broadband Network began paving the way for greater connectivity, collaboration and competition between institutions (and groups of institutions), learning and teaching, and research, as communication feeds become faster, cleaner and more dynamic.

In 2002, Professor Ryan convened the biennial conference of the International Australian Studies Association at the Ourimbah Campus University of Newcastle, New South Wales. Former Federal Education Minister and Senator Susan Ryan was invited as the conference's special guest of honour. Eighteen years earlier, in 1984, the then Minister had outlined a case for what she referred to as an "ambitious, wide ranging, consultative and creative program to rectify the past neglect" of Australia as a subject of University education and research (Ryan, 1985, p.15). The occasion was the annual conference of the Association for the Study of Australian Literature (ASAL founded 1977) at Ballarat, where the minister had been invited as special guest speaker. The context - an academic conference on Australian Literature (Senator Ryan had graduated with an MA in Literature before entering parliament) - would establish one of the early and enduring principles of Australian Studies: that it would be defined as being interdisciplinary by building upon the strengths of key disciplines. The 2002 conference generated "The Ourimbah Declaration", following on from and extending the "Debrecen Declaration" of ten years earlier, by calling for the greater internationalisation of Australian Studies. The great changes being effected by the Digital Revolution encouraged efforts to internationalise Australian Studies.

Hungarian Australian Studies had followed closely on the heels of the release of an Australian federal government 'Guide' called *Australian Studies Overseas*, which was the second part of a two-part review of "Australian Studies in Tertiary Education". The main report, *Windows onto Worlds: Studying Australia at Tertiary Level*, had been published in June 1987. Both the report and the guide were presented to the Australian Parliament by the then Minister for Employment, Education and Training, John Dawkins, who endorsed the central tenet and recommendation concerning what was called the "Australianisation of curriculum" (CRASTE, 1987a, p.iii). Although

this phrase raised a few eyebrows, it was in keeping with the mood of the time, in that it professed a form of 'benign nationalism' (Ryan, 1985) then a common currency of Australian literature, film, music, and a good deal of popular culture (Turner, 1994) - by promoting Australian education and calling to account a university system that had been steeped in British traditions. The review had been commissioned by Dawkins' predecessor, Senator Ryan, in 1984, under the auspices of the Australian Bicentennial Authority established to oversee the 1988 celebrations of two hundred years of colonial settlement (Ryan, 2004, p.26).

The formal announcement of the Committee to Review Australian Studies in Tertiary Education (CRASTE) was made in Canberra on 11 October 1984, along with the allocation of AUD1.3 million which, by the standards of the time, was substantial. CRASTE comprised three members: Kay Daniels (Chair) from the University of Tasmania, Bruce Bennett from the University of Western Australia, and the independent scholar and author, Humphrey McQueen. Its work began in early 1985. Beyond the terms of reference, the members appeared to be in broad agreement about the need for Australian Studies to be a core component of Australian tertiary education. Like the Minister, they saw the bicentenary as an opportune moment to dismantle the influence of London and Oxbridge, especially the privileging of British degrees.

Looking back from the vantage point of 2004, Manning Clark Professor of Australian History at the Australian National University, Ann Curthoys, noted:

Both the Minister and her Committee, and indeed many of those who made submissions or otherwise contributed to the work of the Committee, belonged to the same cohort of educated Australians. They were born between approximately 1940 and 1950 and were part of a generation that had entered the universities from the early 1960s in unprecedented numbers. Yet when this new and large generation of Australians entered universities, it found a university system still oriented to Britain and rather slow to respond to changes in Australian society and culture... For this generation, born in the 1940s, schooled in the 1950s, and flooding in to the universities in the 1960s, the universities had provided an undergraduate education that included very little about Australian culture, society and history. (Curthoys, 2004, pp.60-61)

Daniels (1941-2001) had graduated from the University of Adelaide in 1963. Like many aspiring Australian academics at the time, she travelled to the UK to read for her PhD—at the University of Sussex. Her subject was the British novel of the 1890s (Roe, 2002). Bruce Bennett (1941-2012) was a Rhodes Scholar from the University of Western Australia with an interest in the poetry of TS Eliot which he studied at Pembroke College Oxford (Haskell, 2012). Both Daniels and Bennett took up the cause of Australian Studies when they returned to Australia. They were also interested in interdisciplinary approaches to subject Australia. Daniels taught Australian history and women's studies at the University of Tasmania. Bennett introduced Australian literature at the University of Western Australia. In 1991/92, he collaborated with Tom Stannage from the history department, in an effort to establish an Australian Studies Centre at UWA. In 1993, Bennett left UWA to take up the chair of Australian Literature at the Australian Defence Force Academy. CRASTE's third member, Humphrey McQueen (1942-) had taken an undergraduate degree from the University of Queensland and was, for a time, enrolled in a PhD program at the Australian National University, where he was also a tutor for Manning Clark, before becoming a freelance historian. He was well regarded for his polemic and history *The New Britannia: an Argument Concerning the Social Origins of Australian Nationalism* (1970).

CRASTE's agenda to Australianise the curriculum of Australian Higher Education was seen, in its time, as a natural, if somewhat overdue, corrective to the "cultural

cringe”, and was stimulated by, as much as anything, generational change in the academic workforce noted by Curthoys in 2004. Through the sheer weight of numbers, cohorts of then younger scholars, known as the Baby Boomers, altered the profile and character of Australian Higher Education. These well-educated Boomers came to signify a generational transformation, as Australian universities became decidedly younger, outwardly confident and progressive. “I embarked on a project to introduce full Australian literature courses in my home university”, Bennett reflected, “In that way, I fancied I was establishing my rootedness in my local and Australian community. I felt ‘responsible’ for my local culture” (Bennett, 2008, p.137).

In addition to his regular lecturing duties, Bennett became editor of the journal, *Westerly*, which had been established in 1956 by one of his former lecturers, the writer and academic Peter Cowan. During Bennett’s time as an undergraduate, his home state of Western Australia had boasted one University, founded in 1911, and fewer than four thousand students. In the early 1960s, there were around 50,000 undergraduate students enrolled in BA programs across Australia’s then ten universities (Marginson & Considine, 2000, p.33). Today there are four times that number of Universities and twenty times more students. Approaching the third decade of the twenty first century, academics now teach far greater numbers of students from a broader diversity of backgrounds utilising technologies that would have been beyond the wildest dreams of the original architects of Australian Studies.

CRASTE’s recommendations favoured the drawing together of coalitions of Australian interests, including government departments, agencies and universities to support “Australian Studies Overseas.” That was the strategy which underpinned our efforts to establish Australian Studies in Hungary. An obvious and inescapable assumption of the CRASTE report, and a possible source of disagreement between committee members, was the implied deployment of Australian Studies as “soft power” in international diplomacy. “Realms in which such benefits might accrue include trade, politics, social life, culture, science, the military, intelligence gathering, scholarship and education”, the Report noted, “These are not clearly distinguishable, though their cataloguing allows us to present most of the pertinent issues” (CRASTE, 1987b, p.238). A 2013 index ranks Australia highly placed among those countries which use soft power as a tool of diplomacy (Soft Power). The extent to which Australian Studies forms part of this is not certain, but it is clear that this was a lever CRASTE was prepared to pull—in order to gain greater investment internationally. The attractiveness of Australian Studies in Hungary for Hungarians, I observed in 1992, was its vibrant English-language culture which offset some hegemonic implications of both British and American Studies. The Australianisation of the Australian curriculum in Australia, I believed, had the positive effect of contributing to the independence and attractiveness of Australian Studies internationally.

The CRASTE Report also quoted the Department of Foreign Affairs “which pointed to Australia’s relatively small effort in cultural relations.” While highlighting, by way of comparison, Canada, which had “upgraded the role of cultural relations to give it priority alongside politics and economics in the conduct of foreign policy,” CRASTE noted:

European countries invest between 0.2 and 0.9 per cent of their national budgets on such programs, with France committing one per cent, investing the most. The US spends 0.09 per cent [...] which does not include the cost of extensive United States Information Service activities abroad. (CRASTE, 1987b, p.238)

By contrast, Australia’s cultural relations investment represented just 0.0000325 per cent of the national budget in 1985, of which only a small portion went to higher education. By contrast, the US, UK and Canada acknowledged the value of “intellectual

and educational capacities”, argued James Walter, through the “activities of the US Information Service, the British Council or international Canadian Studies programs” (CRASTE). Walter noted a reciprocal working arrangement that had grown up between the Menzies Centre, following its inauguration in 1983, and the Australian High Commission in London which “recognised the value” of academic “infrastructure and personnel” to the management of “information for London dissemination” (Carter, 2004, p.218). Even so, funding remained, at best, ad hoc. Today, there is a greater number of Australian Studies Centres across China than in Europe and burgeoning Australian Studies interest throughout India.

Left somewhat bruised by his experiences of heading up the short-lived federally supported Offshore Australian Studies reference group between 1995 and 1998, Walter, who, along with Professor Susan Lever from the Association for Studies on Australian Literature, criticised what they called departmental and policy caprice in “The Relationship Between Australian Studies and Government.” Walter and Lever concluded that the only “apparent element of continuity” in government policy “has been the assumption that cultural promotion must serve trade promotion.” Further:

The focus of successive Australian governments, and their departments, on narrow short-term goals and immediate economic returns has not only undermined overseas initiatives to develop knowledge about Australia, it has destroyed the possibility that Australian Studies can provide the avenue for improved understanding that would bring economic trust [...] The hope of economic gain was a flimsy ground for building on already existing interests in Australian Studies [...] There were perverse effects, in Asia at least—Australian economists were much more likely to be funded to travel and ended up with audiences interested in writing and film; Asian specialists in, say, literature ended up giving papers at their own conferences on comparative economic systems because they saw this as a way of getting funding that might flow onto their own centres. It was a real impediment both to serious research and to a meeting of minds around common interests. Insistence on a purely pragmatic purpose, such as trade, rarely recognises or responds to the actual needs of offshore interests. (Carter, 2004, pp.82–83)

Five recommendations had been made by CRASTE for the development of Australian Studies internationally. The first included the establishment of a joint working party by federal Departments of Education and Foreign Affairs, with representatives drawn from relevant agencies and universities to “coordinate Australia’s educational activities overseas, including Australian Studies.” This has stood the test of time through overseas missions and councils such as the Australia–China Council and the Australia–India Council, and through pro-active diplomatic missions such as the Australian Embassy in Budapest. The second recommendation was that “this coordinating body” should consult with a “wider range of professional bodies and other organisations both in the arts and humanities, and in science and technology” (CRASTE, 1987a, pp16–21). The third recommendation, in two parts, was that (a) Australian Studies should work collaboratively with English-language programs and (b) that bridging language courses should contain significant Australian Studies materials specifically for overseas students wanting to study in Australia. The fourth and fifth recommendations argued that cultural agencies, book publishers and the Australian national broadcaster should become more actively involved in the promotion and resourcing of Australian Studies internationally (CRASTE, 1987a). The Report, more generally, expressed concern about the paucity of Australian teaching materials and the general lack of print-based and audio-visual materials, which has been significantly superseded by the digital revolution.

When CRASTE was commissioned, Australia had thirteen universities. By the time of the publication of the Report just four years later, the binary divide in Australian Higher Education, separating Universities on one side from Colleges of Advanced Education and Institutes of Technology on the other, was abolished. Further, under the influence of Minister Dawkins, Australian Higher Education began to be conceptualised as a market and export industry. With an influx of Australian and international students, teaching loads more than doubled between 1989 and 2007, while the number of full time staff failed to keep pace and increased by less than 20%. National and international enrolments jumped again by around one quarter in the five years to 2011 (Australian Council, 2012). Deregulation by successive governments encouraged private providers (Harding, 2014), in what was becoming a sector characterised by “demand-driven funding” (Higher Education Bill, 2014). Higher Education is now Australia’s third largest export industry, in which more than one in four enrolled tertiary students are international, the highest proportion of any OECD country. With seven percent of all international tertiary students globally, Australia had become the largest provider behind the US (eighteen percent) and UK (ten percent). Today there are more than a million Australian and international students studying at Australian Universities.

When Dawkins was first elected to parliament in 1974, fewer than ten percent of matriculation-age Australians were at University. Thirteen years later as Minister for Education, Dawkins was determined to create circumstances in which degrees would come within the reach and ambitions of the majority. The plan was simple, bold and ruthlessly effective: bring to an end an elite system by increasing the number of Universities and boosting enrolments. Such an expansion would be part-funded by deferred student loans. Universities might also pursue alternative revenue streams. Dawkins envisaged the creation of a multi-billion dollar education export industry built on international enrolments.

In 1985, Senator Ryan had set the “guidelines to provide fee-charging for international students.” Dawkins pursued the agenda with a greater sense of urgency and moved internationalisation “from the margins to the centre.” He saw new opportunities for an “education industry” capable of exporting the Australian “product to Asia”, especially, and thereby “helping to improve the account deficit” associated with expanding educational opportunities locally (Marginson & Considine, 2000, p.30). Diversification of income through internationalisation thus became the order of the day, with almost all Australian institutions cross-subsidising local enrolments with full-fee paying international students. A few institutions became over exposed, as was obvious during the SARS pandemic fears of 2003 and when Indian enrolments declined sharply after 2009. As an exercise in social democracy, however, the reforms proved to be a success. The number of Australian universities doubled overnight and enrolments increased dramatically. By the early decades of the twenty-first century, eighty percent of all Australians between the ages of fifteen and nineteen were participating in secondary or tertiary education, while more than thirty percent of those aged between twenty and twenty four were enrolled in higher education.

Sadly, Bruce Bennett died in 2012 at the age of seventy-one. Many of his near contemporaries, who had contributed to the development of Australian Studies were, by this time, on the verge of retirement or had already left paid employment. On their watch, the academic workforce in Australia had gone from comparative youthfulness to being one of the oldest in the nation, with the arts and social sciences typically occupying the upper echelons in terms of age.

In 2005, University of Adelaide demographer Graeme Hugo invoked the image of a ticking “time-bomb” while investigating Australian academia’s generational dependence on the “boomers” (Hugo, 2005). A review by the learned academies seven years earlier had revealed that around half of all arts and social science

academics had won their way into higher education employment between 1970 and 1975 (Academy of the Humanities, 1998; Academy of the Social Sciences, 1998). By 2011 Boomers accounted for fractionally under half of the academic workforce (48.5%), as generational renewal became a priority for all Universities (Hugo, 2012). The Boomers' generational imprint and the "seventies experience" had powerfully shaped the disciplines and academic networks which gave rise to Australian Studies from the 1980s through to the 2000s. Properly speaking, the area had been part of the "new humanities" and social sciences which, by the time of the CRASTE report, attached "Studies" to a range of interdisciplinary descriptors, including cultural- and cultural policy-studies, feminist/gender studies, postcolonial/subaltern studies and legal studies, among many others from area- to media-studies and beyond. Some of the more spirited debates between practitioners involved challenges to traditional disciplines (such as Literature and History).

ELTE's Australian Studies specialist, Dr. Dorottya Holló belongs to an important step-generation - the "Busters" - between the Boomers and their successors. Her tireless work has seen the development of Australian Studies as a viable and ongoing discipline in Hungary. Endlessly generous, Dorottya has also overseen the development of next generations of scholars in the field. On her watch, Australian Studies has become an established feature of ELTE's curriculum, while borderless education through digital disruption opens up new possibilities and paradigms for co-creation, paving the way for further cooperation between universities at each other's "Antipodes" in Hungary and Australia.

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# **MORE THAN ONE BEGINNING: THE START OF AUSTRALIAN STUDIES IN HUNGARY**

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## **Abstract**

Australian Studies in Hungary has a long and varied history. How long exactly? This paper seeks to contextualise the beginning of this relatively new scholarly field in Hungarian tertiary education. It became clear during the research process, which involved archival research, document analysis and personal interviews, that instead of determining one specific date for the beginning, only the process of the evolution of Australian Studies can be traced, its stages of development and the motivations of its participants. The paper argues for the role personal and professional contacts and scholarships and grants, as well as diplomatic support and political regimes, may play in the launching of a regional study field within a distant culture.

## **1 Introduction**

Tracing the beginning of Australian Studies in Hungarian tertiary institutions is actually not as easy as it seems. Whilst some participants have published recollections (Nile, 1992; Riemer, 1993; Buckrich, 2016), there has been no extensive research conducted into the topic which takes account of all the available documents or oral history of the programmes. One might think it was possible to find a clear date for when it all began, with no Australian Studies before a specific date and some afterwards. But it is not like this at all. After spending considerable time finding and interviewing the parties involved, it has become more and more obvious that the matter is much more complicated than finding one such date. There are, in fact, multiple beginnings. In this paper, I will attempt to trace these elusive dates and pin down these beginnings, to be able to demonstrate the role personal and professional contacts and scholarships and grants, as well as diplomatic support and political regimes, may play in the launching of a regional study field within a distant culture.

## **2 Initial stages: 1980-1989**

1980 was certainly a year that could be singled out as a beginning for Australian Studies in Hungary. Many of the key figures who were later to play important parts in the story were university students at the time (e.g., Dorottya Holló, Ágnes Tóth), while others were only in primary school. In 1980, however, Professor Veronika Kniezsa, already an established scholar of historical dialectology and member of the Department of English Studies at Eötvös Loránd University (ELTE), had the opportunity to spend two months in Australia, courtesy of family relations. Whilst Veronika Kniezsa initially travelled to Adelaide, she was soon to find out that she was embarking upon

one of the most interesting adventures of her life. Her host family took her on a round-trip of Australia. Among many sights, Veronika visited Uluru, (known as Ayers Rock at the time), the Great Barrier Reef, Phillip Island, The Sydney Opera House, Brisbane and Canberra. As well as acquiring first-hand experience of these tourist destinations, Veronika also had the chance to meet with academics who encouraged her to include Australian English within her scholarly work. She received materials and advice and made very useful academic connections. Even though she never had the opportunity to return to Australia, this first trip sent her down a new path, and the study and teaching of Australian English and Australian culture became part of her academic life. From this time on, she incorporated Australian content into her linguistics seminars, and nurtured students' growing interest towards this new field of study. There were quite a number of Australian-themed MA theses written under her guidance, such as *Contemporary Australian Society* by László Gyenes (1983), *The English Language in Australia* by Zsuzsanna Molnár (1984), or *Language and Society* by Zsuzsanna Virág (1993). László Gyenes' thesis is quite possibly the first scholarly piece ever written at ELTE (and Hungary) on an Australian topic. It may be argued with considerable confidence that professional interests as well as personal contacts were very important in starting Veronika Kniezsa in the direction of studying a country 20,000 kilometres away from Hungary.

Dorottya Holló has a similar story. She too has family connections in Australia. Combining personal and professional interests, in 1986 she chose to apply for an AEAP (Australian-European Awards Program) scholarship to Australia. Under this programme the Australian Government offered scholarships for postgraduate study for applicants coming from various countries in Europe. She won the scholarship in 1986 and went on to stay in Sydney for a year. She originally planned to live on campus, but her Australian family invited her to move in with them and she became part of their circle, thus learning about her academic subject as well as Australian everyday life.

Dorottya Holló obtained her first degree in English and French Language and Literature in 1983 at ELTE. She became a TMB<sup>1</sup> scholarship holder (TMB stands for Scientific Appraisal Committee, a body which operated under the auspices of the Hungarian Academy of Sciences until 1992) and started teaching at Karl Marx University of Economics while keeping a part-time teaching position at ELTE. It was in 1988 that she defended her doctoral thesis in English linguistics, achieving "summa cum laude" honours. From September 1988, she became a full-time member of the English Department at ELTE. Little did she know that a few years later she was to become the head of the newly formed Australian Studies programme at her university. But let us not get ahead of ourselves. There were a few other "beginnings" as well.

"The road back to Budapest had been a long one." This is how Judith Buckrich, author, historian, scholar, the first person to run an only-Australian content course not only at ELTE, but at any university in Hungary, began her reminiscences (J. Buckrich, unpublished manuscript, 18 April 2018) about her role in the starting of Australian Studies in Hungary. It is not altogether surprising, however, that it was Judith Buckrich, and not someone else, who ended up running the first Australian course in Hungary. She was born and raised in Budapest. In the wake of the revolution of 1956 her family left Hungary just before Christmas in 1957, spent the next months in Vienna and then, in March 1958, when Judy had just turned 8, they boarded a ship bound for Melbourne from Trieste. They arrived in Melbourne in April.

Buckrich's 2016 book, *The political is Personal: a 20<sup>th</sup> century memoir*, provides further details of her journey of development. Despite being fully assimilated and growing up as an Australian girl, Judy never lost interest in Hungary and returned at the first opportunity in 1971. She was 21 at the time. During her stay of a few weeks in

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<sup>1</sup> Tudományos Minősítő Bizottság (Scientific Appraisal Committee)

Budapest she met with family and childhood friends and revelled in streets that were safe at night. She visited her old block of flats, went to galleries and hung out with friends she had met on the journey from Paris to Budapest.

Judy did not return until 1984. By then she was 34, had completed a degree in drama and media studies; she lived on a farm, worked as a part-time teacher and wrote and performed plays in the city every couple of years: a very bohemian life. She spent six months in Europe that year, two of them in Budapest, going to the theatre twice a week and meeting people working in the arts. There was a strong wind of change in the air, people were travelling and working outside Hungary, there was a growing impatience with the old socialist way of life and a longing to be part of the cultural changes sweeping the world at that time. Hungary suddenly appeared as an attractive tourist destination and many travellers visited from all over the world. Judy was a member of the International Theatre Institute (ITI) and the women (e.g., Júlia Gábor) she met at the Budapest office at the time encouraged her to write about Australian theatre. It all suggested that she should return for a longer time.

Later in 1984 she returned to Australia, working in the burgeoning Community Arts sector. She did write about Hungarian Theatre for the magazine of Multicultural Arts Victoria (Buckrich, 1987) and about Australian theatre for the Hungarian Theatre Institute Magazine. She then met a Hungarian man who was completing his Master's degree in Melbourne and the idea of returning to Hungary for a longer time started to become very real.

By July 1987 Judy was back in Budapest. She used the Hungarian Writers' Association Library as her base and was asked to give a talk there by the Association's President, author and translator Árpád Göncz, about Australian literature. The friendship between Judy Buckrich and Árpád Göncz continued even after he became the President of the Republic of Hungary. Judy had no idea at the time that he was going to be such an "important person"; their discussions were always about literature and translation (Buckrich, 2016, p.343).

A chance visit to Venice for a few days gave an opportunity for Judy to meet Bernard Hickey,<sup>2</sup> who was teaching Commonwealth Studies at Ca' Foscari University<sup>3</sup> of Venice. This gave her the idea that perhaps she could also introduce a unit in Australian Studies as an elective at ELTE. Tom Shapcott, then Head of the Literature Board in Australia, had encouraged her to apply for a Literature Board residency in Venice so that she could observe Bernard Hickey teaching and have some proper discussion with him about what she could do in Budapest.

Tom Shapcott himself has a long history of being interested in Hungarian subjects. He published a novel entitled *White Stag of Exile* in 1984 about Károly Pulszky, the first director of the Hungarian National Gallery of Fine Arts, who had been exiled and made his way to Queensland in Australia where, after two years of struggle, he committed suicide in 1899. Pulszky was the son of Ferenc Pulszky, a member of the diet of Hungary from 1840 and one of Lajos Kossuth's 1848 revolutionary associates. Károly's wife was the famous Hungarian actress Emilia Márkus and his daughter Romola married the great dancer of the Ballet Russes in Paris, Vaslav Nijinsky. Shapcott had been researching the Pulszky story since 1980 and had made several trips to Hungary.

*White Stag of Exile* was translated into Hungarian by Péter Balabán, who also wrote an "Afterword." 8,000 copies of the book were printed in time for the launch at

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<sup>2</sup> Veronika Kniezsa recalled that Bernard Hickey, "the marvelous Professor Bernard Hickey" as Richard Nile refers to him (p.14), was the person who connected her with the Australian Embassy in Budapest, taking her to the Embassy headquarters at Forum Hotel in the late 1980s (personal communication with Veronika Kniezsa, 25 June 2019).

<sup>3</sup> Hickey left Ca'Foscari University in 1987 and became Professor of English literature at the University of Lecce, where he taught Australian literature for 20 years. <https://www.austlit.edu.au/austlit/page/A29294> Retrieved 30 June 2019.

the Museum of Fine Arts in October 21, 1988. They sold out in just a few weeks. Shapcott arrived in Hungary for the book launch, which coincided with a special exhibition in the Museum of Fine Arts of works collected by Pulszky during his term as the Museum's first director. Judy met him at the airport and "served as Tom's interpreter and minder" (Buckrich, 2016, p.327). By the time Shapcott left, they had become firm friends.

### 3 The institutional phase

In June 1988 Árpád Göncz introduced Judy Buckrich to Professor Aladár Sarbu, then head of the English Department at ELTE. It was agreed that she could put a proposal to the university. By this time she had secured the support of the Literature Board of the Australia Council for the Arts, then headed by Tom Shapcott. She also visited the vibrant Australian Embassy which had many Australian and Hungarian employees. Whilst there was no cultural attaché, the Embassy secretary was very supportive and offered the resources of their library. For a while she became a sort of unofficial cultural attaché and met many Australian artists and writers who were travelling to Budapest to perform or take part in conferences and workshops. She was also put in touch with Chris Wallace-Crabbe, who ran an Australian Studies unit at the University of Melbourne and who subsequently helped her with notes and suggestions. Armed with all this assistance she could hardly fail, and despite never having done anything like this before, Judy created a syllabus and the course was offered.

The shape of the unit called *Australian Literature* that she would offer for the first semester of the 1989/1990 academic year was simple. It was an elective course of one session a week for twelve weeks covering various aspects of Australian music, fine arts, theatre, film, literature, social history and political and economic history. About 14 people enrolled (Buckrich, 2016, p.329), the minimum for it to go ahead. Many of them were intrigued by this new area of study, as most of the English language courses offered at the time were on British or North American topics. The author of this article was one of the students of this course and it certainly whetted her appetite for Australian literature. Photocopies of sections of books were distributed so that students had something to take home to read. I especially recall reading Ania Walwicz and Patrick White. None of the books on the syllabus were available in Hungary at the time. Using a photocopier was itself a challenge as in 1989 these machines were not readily available to the public. Judy had to use the photocopiers at the Writers' Association Library, which were kept under lock and key. It was quite an exercise to convince the man in charge of the copy room to allow access to the machines (Buckrich, 2016, p.302).

Judy's other work at this time signalled a growing interest in the new field of Australian Studies. She translated an anthology of contemporary Australian poetry into Hungarian with the poet and translator István Turczi, whom she had also met at the library. She selected the poems from collections sent to her by Tom Shapcott and did very rough translations that István Turczi could turn into poetry. Judy was also working as a copy editor for the English language *Daily News*, and conducted interviews with interesting Hungarians for (Australian) ABC radio programmes which were broadcast nationally on two programmes: *The Europeans* with Julie Copeland and *Books and Writing* with Robert Dessaix. She also sent many articles about the incredible changes happening in Hungary to *The Age Monthly Review*, *Quadrant* and other magazines. There seemed to be much interest back in Australia in reading about the changes in Eastern Europe at the end of the 1980s, with hardly any Australians able to write and talk about what was going on in this part of the world in a way that was easily understood in Australia.

Whilst the first course focusing on Australia took shape in Budapest, developments towards starting Australian Studies elsewhere in Hungary were

underway, too. In 1989/1990 István Komlósi, husband of Ágnes Tóth, language instructor at the Foreign Language Lectorate at the Debrecen University of Agriculture, won an AEAP (Australian-European Awards Program) scholarship and took his whole family with him on a dependents' scholarship programme. Part of their time was spent at Armidale, at the University of New England, where Ágnes met Professor Shirley Walker, who was the first director of the newly formed CALL centre (Centre for Australian Language and Literature) and the idea of starting Australian Studies in Hungary was born.

Professor Walker wrote a letter to the Australian Ambassador in Budapest, Douglas Townsend, informing him of Hungary's interest in launching Australian Studies at Hungarian universities. Townsend also received a letter from Judith Buckrich, "outlining her activities in support of Australian Studies in Budapest/Hungary" (Personal email from Douglas Townsend, 15 May, 2019). Townsend, in turn, wrote letters in support to DFAT (Department of Foreign Affairs and Trade) "suggesting funds be sought if necessary from the private sector e.g. TNT, Myer Foundation" (ibid). Luckily, Canberra seemed to be supportive of the idea, and the implementation of the project was entrusted to Richard Nile, first director of the Sir Robert Menzies Centre for Australian Studies Centre (SRMCAS) in London. As the Australian Centre's stated mission was "to promote Australian studies in British and European universities and to act as an Australian cultural base in London providing a forum for the discussion of Australian issues" (Menzies Centre) this was certainly the right place to start the ball rolling.

Richard Nile was first invited to conduct a feasibility study on the possibility of launching Australian Studies in Hungary. After the initial engagement by the Ambassador, careful negotiations followed, and Richard Nile's first visit to Hungary was organised for December 1990. Ágnes Tóth recalls (personal communication, 20 June 2019) that it was exactly on the 6th of December (Santa Claus Day in Hungary) that Richard Nile visited Kossuth Lajos University (Kossuth Lajos Tudományegyetem,<sup>4</sup> KLTE) in Debrecen, and plans went ahead to establish Australian Studies there as well as at ELTE in Budapest.

These were indeed pioneering times. Despite the efforts of Veronika Kniezsa in Budapest, and the first course run by Judy Buckrich, there were still only very limited resources and no institutional framework of study within which classes could be organised. Richard Nile (1992) recalls in his article *Home and Away with Australian Studies* that there were altogether three volumes in the library at ELTE which dealt with an Australian topic, "two in English, one in Hungarian" (p.14).

These conditions radically changed after 1990. A number of letters exchanged between the Hungarian Ministry of Culture and Education and the universities involved testify that both parties were more than open to promote this new field of study, "ausztrológia" (austrology), which they saw as a welcome addition to the variety of courses already on offer (KLTE correspondence, June 1991). Richard Nile and the Menzies Centre were to provide methodological support for the launch of this new field. Glenda Sluga, at the time a PhD student at the Menzies Centre, was recruited to travel to Hungary and teach some initial courses both at ELTE in Budapest and KLTE in Debrecen. APTEE (Australian Program of Training for Eastern Europe) funding, combined with sponsorship by Australian companies paid for Glenda Sluga's salary, the Hungarian Ministry of Culture and Education looked after her accommodation (D. Townsend, email communication, 15 May 2019). Richard Nile (1992) describes Glenda Sluga's role in 1991 in the following way: "Her job was to make herself redundant; to raise the level of expertise and confidence, more generally the consciousness of Australia, in her Hungarian colleagues to a point where she is no longer needed" (p.20). According to Nile, hers was "one of the oddest briefs" of any academic (p.20), fostering the conditions for the further survival of the Australian Programme in Hungary, even

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<sup>4</sup> Today the University of Debrecen

in the absence of the initiators. Based in Budapest, Glenda shared her time between ELTE and KLTE, gave lectures and seminars, inspired students and local staff<sup>5</sup>. For example, at ELTE, Gizella Kocztur, formerly specialist in Commonwealth Literatures, was recruited to include Australian authors in her literature courses. Theses written by her students, namely *Bush Ballads and the Australian Legend* by Sándor Pető (1992) and *The early history and culture of Aborigines in Australia* by Mina Charoulla (1994) prove Professor Kocztur's commitment to teaching the new field of Australian studies. In addition, Gizella Kocztur was the appointed examiner for the Australian literature component of Ágnes Tóth's final exam in 1995, the year Tóth gained her doctorate (doc. univ.) and defended her thesis "The Bush Mythology and Women: A study in Australian culture" (Virágos & Pálffy, 2014, p.143). No wonder that, following Professor Kocztur's untimely death in 2014, ELTE acknowledged her contribution to the new field of Australian Studies by stating that she was the first colleague to include subjects of Australian literature in her teaching repertoire (Elhunyt Kocztur Gizella).

In May 1992, ELTE and KLTE hosted an inaugural Australian Studies conference, jointly sponsored by the Australian Embassy and the SRMCAS. The conference consisted of two parts, at two locations: "Mid-May Sojourn" was the name of the first part, hosted by ELTE, where a number of distinguished scholars presented papers (Henry Reynolds, Portia Robinson, Bruce Bennett, Richard White, Chris Wallace-Crabb). KLTE hosted the second part, entitled "Teaching Australian Studies." A great variety of papers were presented and round-table discussions held. At its closure, the conference accepted the so called "Debrecen Declaration", written by, among many others, Bruce Bennett and Chris Wallace-Crabb. The Declaration expressed the wish of all the participants for the Australian Government to support Europeans in their endeavours to study and teach Australian Studies in their respective countries. As Senator Margaret Reynolds, wife of Professor Henry Reynolds, was also in attendance, there was hope that this plea would be heard by the appropriate parties<sup>6</sup>.

The newly established study programmes at ELTE and KLTE were thus strengthened in personnel as well as by financial support. Multiple book donations were organised, and grants were offered for professional development. Dorottya Holló was awarded a visiting fellowship by the SRMCAS and travelled to Australia in 1993/94 to visit a number of institutions (including Griffith University, The University of Melbourne, Macquarie University). Ágnes Tóth also travelled to Australia on various grants on a number of occasions to conduct further study (Nile, 1992, p.19).

There were study opportunities for students, as well. The changes in society brought about by the end of the Cold War did not go unnoticed in Australia either. As markets opened up in Eastern Europe, Australian businesses began to liaise with Diplomatic Missions and Trade Commissions to seek opportunities for commerce. For example, in 1991, an Australian company, Coca-Cola Amatil entered into a joint venture with the Likóripari Vállalat (Liqueur Production Company) in Budapest (History). Interested in playing a part in the local scene and finding a way to promote Australian manufacture, they decided that helping to fund the teaching of Australian Studies in Hungarian universities seemed like a good idea. Thus a co-operation between DFAT, Coca-Cola Amatil and the Australian Studies Centre at the University of London (at the time part of the Institute of Commonwealth Studies) was realised. The "Coca-Cola" scholarship programme was launched, which aimed to fully fund the winner of the best student essay on a chosen Australian topic to study for a full semester at

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<sup>5</sup> Andrew Riemer's book *The Habsburg Cafe* (1993) blames "Byzantine rivalries in Hungarian academic circles" (p.167) as the reason why Australian studies never got off the ground in Szeged. Riemer ran a course in Australian literature in the autumn semester of 1991 "to a group of young people who know very little about that distant land and lack almost all curiosity about it" (p.159)

<sup>6</sup> As the text of the *Debrecen Declaration* could not be found, I relied on the recollections of Ágnes Tóth here.

Griffith University. The first student, Mónika Gyórfy from Debrecen, travelled in 1993. Tímea Tiboldi, the winner of the second scholarship, recalls landing in Brisbane on her 25th birthday, on July 14, 1994. She was followed by Ágnes Szokolczay and Gyula Tankó in 1997. Tiboldi and Tankó are currently colleagues at ELTE. In 1996 and 1999 respectively, Gyula Tankó with Carl Whitehouse co-edited two volumes of student essay collections: *Breaking ground: Eight student essays on Australian literature*, and *Reflecting on the island continent: A collection of papers in Australian studies*. Eszter Sándor and Éva Zöld were the last ones to travel. As after 1999 economic conditions changed and many Australian business ventures moved East, Coca-Cola Amatil withdrew its sponsorship and the scholarship ceased. To this day, no other sponsor has been found to continue the scholarship programme.

#### 4 Post-millennium

By the early 2000s the Australian Programme had truly become part of Hungarian higher education. Whilst Budapest and Debrecen represent the major concentration of staff and resources, there are colleagues teaching and researching Australian content elsewhere in Hungary, too. Associate Professor Éva Forintos (also an author in the current volume) wrote her PhD on an Australian inspired topic, *Select aspects of Australian-Hungarian language-contact phenomena: A corpus-driven contactlinguistic study*, as well as writing a coursebook (*Australia: A Walkabout*) on Australia. Among other commitments, she continues to teach courses on Australian language at the University of Pannonia in Veszprém. Veszprém and the University of Pannonia also hosted a major EASA<sup>7</sup> (European Association for Studies of Australia) conference in 2015. This was the second EASA conference organised in Hungary. The first one, hosted by the re-named University of Debrecen (Debreceni Egyetem, DE) in 2005, was organised by Ágnes Tóth and Gabriella Espák. Gabriella Espák, former student of Ágnes Tóth, became interested in Australian Studies quite early on. She gained an AEAP scholarship (following in the footsteps of Dorottya Holló and Ágnes Tóth) and completed a year of study at Curtin University in Perth in 2000-2001. She defended her PhD dissertation (*Federal multicultural policies and the politics of Indigeneity in Canada and Australia between 1988-1992*) in 2003, and currently teaches Australia- and Canada-related subjects at the North American Department of the University of Debrecen. She has supervised a large number of theses as well on different Australian topics (for more detail see the Thesis Supervision section of the website Tóthné dr. Espák Gabriella [http://ieas.unideb.hu/admin/file\\_5561.pdf](http://ieas.unideb.hu/admin/file_5561.pdf))

A final word about the author of this article, as my own personal and professional story also runs parallel with the development of Australian Studies in Hungary. I participated in the first Australian course offered by Judy Buckrich in 1989 out of personal interest. A few months after the completion of the course I married an Australian man and moved to Australia for three years. In an attempt to get to know Brisbane and Australia, I enrolled at the University of Queensland (UQ) and took all possible Australian Studies subjects offered at BA and MA level. Whilst my academic career at UQ was cut in half by my return to Hungary in 1993, I could not escape my 'fate'. From 1993 I was employed by the Australian Centre for Education (ACE) in Budapest, which was established by IDP (the International Development Programme of Australian Universities), at first as Director of Studies, and later as Director. In 1994 Dorottya Holló convinced me to teach an elective course at ELTE on my favourite research topic: contemporary Australian women writers. The voluntary job turned serious in 2001, when again at Dorottya Holló's invitation I chose ELTE as

<sup>7</sup> EASA conferences have been held biannually since 1991. There is a recent attempt to hold conferences annually "to boost networking" (EASA).

my full-time employer. Apart from spending two years in Australia in 2004–2005, I remained loyal to ELTE as the “Australian lecturer,” and over the years I have taught numerous courses on a variety of fields of Australian Studies, ranging from literature through culture to film (for more information see the Course History section of the Australian Studies Programme website). Over 70 students have written their theses on different areas of Australian Studies under my supervision, with six winning the “Outstanding Thesis Award” of the School of English and American Studies (SEAS) of ELTE, granted to students conducting excellent research. Altogether there have been about 120 theses<sup>8</sup> written about an Australian topic at ELTE so far. One of my first students, Ildikó Dömötör, completed her PhD dissertation (*Gentlewomen in the bush: A historical interpretation of British women’s personal narratives in nineteenth-century Australia*) in 2004 at Monash University, in Melbourne, and currently works as an Associate Professor at the University of Nyíregyháza, Hungary.

There were many other colleagues over the years who taught Australian Studies in Budapest or other parts of the country. Andrew Riemer, Carl Whitehouse, Alanna Sherry, Anette Bremer are just a few names to single out. There were countless academic visitors who enriched us professionally over the years by giving lectures and workshops on important and relevant topics. Their names are well documented on ELTE and DE websites (Australian Studies Programme; Australian Studies Centre). Each course, each visitor added something extra. It is impossible to list everyone.

Today there are almost 2,000 volumes at the SEAS library at ELTE (1,931 to be exact. This figure, provided by SEAS head librarian Nóra Deák, is the sum of books in the Australian collection, and does not include any Australia-related books in linguistics or periodicals). A long way from the three volumes counted by Richard Nile in 1991. The growth in books at the library symbolises the growth in support for the Australian Studies programmes in Hungary. After the period of “beginnings,” the programme has well and truly blossomed and is here to stay for the future. Thanks to the relentless efforts of those early actors, Australian Studies in Hungary has come of age and is ready to face new challenges.

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<sup>8</sup> I am grateful to Nóra Deák, the chief librarian of SEAS Library for extracting this data from the library catalogue.

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# LANGUAGE AND CULTURE MAINTENANCE EFFORTS OF THE HUNGARIAN COMMUNITY IN AUSTRALIA

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## Abstract

The role of language in the context of ethnic identity has recently been an important topic of research. Language can be regarded as the symbol of an individual's identity, one of many constitutive factors of group membership, called ethnicity. Minority communities, for instance immigrant groups, may connect their ethnic identity to language, since language is often seen as incorporating cultural heritage. The aim of this paper is to investigate written mixed-language discourse with the help of a multimodal approach utilising resources that include two issues of *Magyar Élet* (*Hungarian Life*), a weekly published by members of the Hungarian community living in Australia. Contributors to this weekly may find it an important and appealing alternative to rely on resources offered in more than one language. This research investigates and focuses on linguistically mixed written discourse, i.e., the mixed-language practices which characterize the weekly, in order to reveal how these manifestations contribute to the multifaceted identities and how the Australian Hungarian community maintains its heritage language and culture.

## 1 Introduction

In this paper, I argue that the members of the Hungarian community living in Australia (who are presumed to have assimilated into the mainstream culture of their adopted country) have developed an identity which can be considered a combination of their native language and culture and their dominant language and culture. This distinctive dynamic identity contributes to the maintenance of their heritage language and culture. Through negotiating their identity via intentional code mixing in their written discourse, they invite members of the dominant mainstream group to learn about and be a part of their culture. Among the many types of significant influences that minority community media can have on ethnic identity construction, there is an opportunity for the community to be present inside and outside of the group as well as operating as an important communicator of culture and a creator of cultural artefacts. Originally, the illustrative material to be analysed in the present paper was intended to be sourced from the latest issues of the weekly *Magyar Élet* (*Hungarian Life*), however, the final issue to be published, dated 27 December, 2018 was selected. With this issue, the proprietor of the weekly decided to end the publication due to the decline in the number of subscribers and advertisers using the weekly, so no more recent issues are available on the internet. The other source selected was the 14 February 2008 issue; this was the first issue published electronically and represented a milestone in the weekly's history.

In the present paper a multimodal approach is used to study intentional code-mixing; this approach presumes that in addition to language there may be other means available for making meaning. “The meanings of the maker of a text as a *whole* reside in the meanings made jointly by all the modes in a text” (Kress, 2011, p.37). This statement is especially true when meanings in general are to be understood in a community. Kress emphasizes that “in a multimodal approach, all modes are framed as one field, as one domain. Jointly they are treated as one connected cultural resource for (representation as) meaning-making by members of a social group at a particular moment” (2011, p.38). This assumes that the modal resources typical of a culture can be regarded as one comprehensible field, which can contribute to making meaning. Kress (2011, p.38) demonstrates the essence of multimodality as follows:

[m]ultimodality and social semiotics, together, make it possible to ask questions around *meaning* and *meaning-making*, about the *agency* of meaning-makers, the constitution of *identity* in sign- and meaning-making; about the (social) constraints they face in *making meaning*; around *social semiosis* and *knowledge*; how ‘knowledge’ is produced, shaped and constituted distinctly in different modes; and by whom. Multimodality includes questions around the potentials – the *affordances* – of the resources that are available in any one society for the *making* of meaning; and how, therefore, ‘knowledge’ appears differently in different modes.

In applying this approach, I agree with Jaworski (2014, p.135), who states – based on former studies – that writing is multimodal, meaning, “a visual medium that incorporates a number of design features from a range of semiotic systems, for example, the choice of a particular script, the font and typeface, the manner and medium of its execution, the use of colour, and so on.” Sebba (2014) recommends the application of the methods used by linguistic landscape researchers for the study of language alternation in written discourse, and he identifies two techniques which can indicate “the degrees of integration or separation of languages a multilingual mixed-language text can include” (p.14). Moriarty (2014, p.461) is of the opinion that “linguistic communities that are peripheral in nature or in some way marginalized offer a rich source for LL data,” since diasporic communities can express their sense of national and ethnic identity in this manner. This paper follows the approaches suggested by multimodality and linguistic landscape research by analysing the semiotic landscapes via language contact manifestations found in the above-mentioned two publications of the Hungarian community in Australia.

In order to put the focus of the paper into a wider context, I will begin by briefly sketching some meanings of the term ‘identity’. I then delineate issues related to identity and language together with the concept of metrolingualism, which suggests that people negotiate identities with the help of language. The reasons why bilinguals prefer to use one language over the other are also discussed. The next section includes a short history of the weekly *Magyar Élet* (*Hungarian Life*). Later on, I introduce the methods and analyses of linguistic landscape researchers, which are used during the process of studying the linguistic and non-linguistic features of the examples; in this way referring to the multimodal nature of the written discourse discussed in this paper.

## 2 Identity

The term ‘identity’ is regularly used in popular discourse; ordinary people appear to be aware of the meaning of the word, since the way they use it makes it understandable for the participants involved in the discourse. Nevertheless, when discussing issues related to identity, academics consider it important to explain and

define the term itself. Depending on what discipline they are affiliated with, the focal point of their definition can differ.

Although Fearon (1999) emphasises that dictionaries generally do not capture the recent meaning of 'identity', which is quite a challenge to provide anyway, it may seem to be relevant to refer to some dictionary definitions. According to the on-line dictionary of Merriam-Webster<sup>1</sup>, 'identity' means "sameness of essential or generic character in different instances; sameness in all that constitutes the objective reality of a thing; the distinguishing character or personality of an individual." 'Identity' in the Cambridge English Dictionary<sup>2</sup> means "who a person is, or the qualities of a person or group that make them different from others," and the Oxford Dictionaries<sup>3</sup> include a similar meaning, i.e., "the characteristics determining who or what a person or thing is."

Identification can be considered and approached sociologically and functionally on the basis of the dissimilar roles, relations and surroundings in which we have dissimilar selves. From the day we are born we are educated and expected to produce a traditional 'core' identity; nonetheless, in our everyday lives we do not give much consideration to the inconsistencies between our dissimilar selves. Rather, we disregard them, thus achieving a level of social and mental flexibility which is necessary to survive in a multifaceted and inconsistent world. Lemke (2009) draws attention to the identity theory which can be characterised by the notion of 'performing identities', and which involves the activities we accomplish in order to perform our different private and public selves. He argues that we enact the identity most advantageous for us within a set context, and that we should accumulate a set of identity-performing practices, which is a collection of practices exclusive to each individual; nevertheless, in common systems we all share them. Lemke concludes that we can achieve this goal via identification because "at many points in our lives we adopt identities, or the elements of performing them, from the common culture" (2009, p.147).

Jaworski and Thurlow (2011, p.7) note that people construct their identities to a certain extent via "the process of geographical imagining, the locating of self in space, claiming the ownership of specific places, or by being excluded from them, by sharing space and interacting with others". They emphasise that in this context space is 'diversity', so it cannot be considered a mere physical thing that can be carefully circumnavigated. In their argumentation they state that both cultures and people are situated in space, so the concept of home, i.e. belonging, unavoidably depends on particular geographical locations which we become familiar with "both sensually and intellectually through semiotic framing and various forms of discursual construal" (ibid.,7). According to Mahootian (2014, p.193), "identity is not a monolithic concept, but a layered construction". He further argues that the languages we select in our communication "all contribute to who (we think) we are, how we want others to see us and how others actually perceive us" (ibid.,193). Lemke (2004) – in accordance with all of the above – states that identity is multifaceted and can be defined "on many timescales of behavioural coherence". Lemke (2004, p.72) makes mention of identities which we perform, we maintain; or we construct them for ourselves and invite people around us to support them across settings (e.g., age, social class, gender). He finds it significant, however, that we are not misled "by the normative ideal of a consistent fixed stereotypical identity" (ibid.,72), which is the result of the "highly regulative, institution-dominated, modernist culture" (ibid.,72). Sallabank (2013, p.505) supports this idea when she states that due to the influence of postmodernism, identities of recent times are not regarded as fixed, formal realities, "but rather a fluid, shaped while people compose and position themselves within various social settings of their everyday lives." Lemke (2004, p.72) is of the opinion that the majority

<sup>1</sup> <https://www.merriam-webster.com/dictionary/identity>

<sup>2</sup> <http://dictionary.cambridge.org/dictionary/english/identity>

<sup>3</sup> <https://en.oxforddictionaries.com/definition/identity>

of people intentionally activate “on various timescales, identity performances and identity claims that contradict the standpoint of modernist identity standardisation.” Throughout their lives, individuals “surf across the identity possibilities of their cultures, taking them as semiotic resources to play with rather than as essentialist necessities of their being” (Lemke, 2004, p.73). According to Jaworski and Thurlow (2011, p.8), diasporic communities can preserve their sense of ethnic and national identity; also they can articulate their nostalgia for their past and mother country by using imagery of place as a resource. In each ethnic, racial, cultural or gender-related speech community language use is of vital importance. Hortobágyi (2009, p.258) argues that although each individual community has its own norms, codes and forms of communication, language is used not only as a means of communication but also as a marker of the speaker’s cultural identity. A speech community may decide to maintain the commonly agreed rules and norms, but may just as well decide to gradually change them according to the new communication environment. In addition, in all communities there is a certain individual deviation from the norms, as not all the members of a speech community communicate in the same way in a specific situation or interaction.

### 3 Language and identity

Language is one of the resources by which people can ‘present’ and ‘represent’ themselves; language has been proposed as the most significant aspect of individual identity, it is a more typical representative of ethnicity and identity than ancestry, religion or residence (cf. Mahootian, 2014). Identity can be created, manifested and disclosed by language. In order to discuss issues related to language and identity, Lemke (2004, p.69) constructed a theoretical framework, which he named “ecosocial dynamics”. This new approach is a combination of ‘ecosystem dynamics’, which is the compilation of theories in the field of biology that observe how “energy and matter flow through ecological systems and maintain relatively stable patterns of organization” (ibid.,69). The other component of the new theoretical framework is ‘social semiotics’, which is based on Halliday’s (2004) approach to the role of language in society. It refers to the means by which “the social functions of language and other semiotic resources (e.g. visual representations) help determine the variety of those resources” (ibid.,69). Lemke finds it important to add that ecosocial systems do not include organisms but social processes and semiotic practices; in other words, in “communities in which humans most directly participate, ecosocial systems include not only people, but artifacts, architectures, landscapes, etc.” (ibid.,70). Vetter (2013, p.215), in her article on social networks, refers to the paradigm shift that characterizes the identity research of recent times. According to her the obvious relationship between language and ethnic identity should be negated. She declares that in the field of multilingualism research this “essentialism of identity” is rejected, adding that “fluidity of identities is more applicable.” In order to understand this phenomenon, it is very important to equally study the systems of knowledge that generate it and the multilingual environments in which it is produced. In the case of metrolingualism, for a more precise study of contemporary language use, meanings must be deconstructed, reconstructed and negotiated not only according to the stance of the interlocutor or of the reader and their cultural norms, but also according to the environment in which they occur (Hortobágyi, 2017, p.146). In other words, multilingual people negotiate their multiple identities in contact situations. Referring to language contact situations, Clyne (1991, pp.3-4) states that linguistic behaviour is “both an expression of multiple identity and a response to multiple identity,” adding that one of the four major functions of language is that it is “a means by which people can identify themselves and others.”

Gardner-Chloros (2014, p.176), referring to Hamers and Blanc (2000, pp.204-207), highlights that people, during the process of becoming bilinguals, acculturate into the other culture, by which they become bicultural through the acquisition of the language skills and cultural rules of the new culture and assimilate them properly into their primary culture; thus their identity develops into a bicultural one. She goes on to argue that the effect of language on identity is of significant importance.

The concept of 'metrolingualism', which was developed by Otsuji and Pennycook in 2010, is defined by Jaworski (2014, p.134) "as the contemporary practice of creative uses, or mixing, of different linguistic codes in predominantly urban contexts, transcending established social, cultural, political and historical boundaries, identities and ideologies." Jaworski (2014, p.139) emphasizes that the ultimate goal of metrolingualism is to confront and undermine conventional and stable identity attributions; that is, "to disrupt or destabilize dominant expectations and ideologies." Jaworski (2014, p.139) accepts Otsuji and Pennycook's (2010, p.246) explanation of metrolingualism, according to which

the way in which people of different and mixed backgrounds use, play with and negotiate identities through language [...] does not assume connections between language, culture, ethnicity, nationality or geography, but rather seeks to explore how such relations are produced, resisted, defied or rearranged; its focus is not on language systems but on languages as emergent from contexts of interaction.

#### **4 Language choice of bilinguals**

Language choice is predominantly concerned with linguistic resources that are accessible to bilingual people, and conversely with how they formulate their preferences in terms of code choice when interacting with their fellow community members. L1 and L2 use of bilinguals can refer to their group membership with regard to how they perceive themselves and in relation to others. In other words, they designate their view of themselves and their connection to other participants in the discussion. Myers-Scotton (2006, p.143) supposes that the most important motivation for deciding on the use of a language in an interaction is to revive the socio-psychological values that are connected to that language. She presumes that all the linguistic varieties that are at the disposal of the members of a bilingual community are associated with particular social meanings, which is a component of bilinguals' communicative competence. Many factors can influence the preference of one language over the other (language attrition, imperfect language learning), Myers-Scotton (2006, p.141) however, emphasises that it is the symbolic value that a certain language has which is most likely to contribute to the decision. She also states that "choosing a variety is both a tool and an index of interpersonal relationships." The linguistic choices can be referred to as indexical signs. Nevertheless, Myers-Scotton (2006, p.145) underlines that "the variety itself is not a message, but it points to a message" carrying a unique sort of meaning. She continues the argument that "as indexical signs, the choice is not the social message [...] the interpretations are the social messages." Obviously, several interpretations can be connected to the choice.

Clyne (2003, pp.67-68), when discussing the language maintenance of bilinguals, states that the disadvantages of the process can at times prevail over the advantages. Drawbacks can involve the negative effect on the individual's identity, on the one hand, and forced identification from the outside world, on the other. Benefits include the possibility of articulating the speaker's multiple identity in words, as well as the opportunity to express solidarity in the community and the family through

effective communication. Clyne (2003) refers to the market value of a language, which comprises the linguistic market for interethnic communication (majority language) and intraethnic communication (choice of languages). He suggests that bilinguals have to consider the continuing advantages of language maintenance as they get integrated into the interethnic marketplace. Code-switching/code-mixing is a prevalent occurrence in bilingual verbal communication; consequently, the majority of research on bilingualism concentrates on this subject matter.

Riehl (2005) describes the different approaches scholars have produced in their studies distinguishing between three types of procedures which may aid the investigation of code-switching/code-mixing. First of all, she mentions the sociolinguistically conditioned approach, in which “factors such as the interlocutor, social role, domain, topic, venue, medium, and type of interaction play an important role” (ibid.,1945). This socio-pragmatically conditioned approach does not involve function “in the local conversational context” (ibid.,1945); rather it can express attitudes towards language or can indicate linguistic identity, since it concentrates on why and when a language user selects one language variety in preference over the other. The grammatical approach to code-switching/code mixing focuses on patterns, i.e., the types of switching/mixing structures found in particular data. Riehl argues that through this investigation “it is possible to offer interesting indications about the underlying structure of language systems by analysing code-switching constraints, i.e. the points within a sentence at which the transition from one language to the other is possible” (ibid.,1945). When scholars focus on the processes that are going on in the speaker’s brain, they are involved in the third aspect, i.e., the psycholinguistically motivated code-switching, which incorporates language alternation stimulated by the specific conditions of language production, not by the intentions of the speaker. Clyne (2003, p.162) provides examples of these occurrences under the heading of “triggering,” or “facilitation”. This is what Auer (2013, p.461) refers to as non-orthodox or facilitated code-switching/mixing, during which the transition is not sudden but goes through an indistinct phase. Riehl (2005, p.1954) concludes that both the sociolinguistic and the psycholinguistic approaches focus on speakers who use different codes, while in the focus of the grammatical approach the language system is utilised. Studying popular mainstream publications in the United States, Mahootian (2014) observed that the examples of intentional code-switches between English and community population language found in nationwide publications in the United States are “a discourse practice” with the help of which “a bilingual identity is branded, defined and consequently valorized” (ibid.,195). He maintains that the aim of intentionally produced code-mixing in printed media is “to delineate territory, socially and politically” (ibid.,195).

## 5 Linguistic landscape research

For the study of language alternation in written discourse, Sebba (2014) proposes the application of the methods and analyses of linguistic landscape researchers who study multilingual signage in urban centres. The works of Landry and Bourhis (1997), Sebba (2012), Jaworski (2014) and Moriarty (2014) clearly build a conceptual framework and network of the elements constituting the linguistic landscape (LL). Based on the references listed it can be argued that both the oral and the written linguistic performances of people are deeply embedded at the intersection between verbal and non-verbal elements. All the representations of these languages – from topographic signs related to place names and street names, public signs and billboards advertising commercial services and cultural performances, to the built environment of shopping malls and airports – underlie the importance of recognizing two symbolic functions for LL, namely the obvious informative function that conveys

information and a symbolic function that embeds our experience in the built realities. Several decades ago, when mobility and worldwide communication were less rushed and complex, this linguistic landscape was supposed to be more static, informing only the people of the contingent multilingual environment. Currently, LL is highly dynamic and is undergoing continuous change. It is also worth considering that presently, as most forms and instances of communication are positioned in relation to social media, and as phone-users communicate predominantly through texts, multimodality also influences the audience's semiotic and generic understanding of information. A novel interpretation of the linguistic input and language resources employed in computer-mediated communication (CMC) and computer-mediated discourse analysis (CMDA) can lead to a better understanding of how the multimodality of media texts generates new meanings through the usage of different semiotic modes (Hortobágyi, 2017, p.147).

For a better decoding of the conveyed message, Sebba (2014) calls attention to the existence of a certain parallelism in both oral and written texts. This means that in a multicultural and multilingual environment there are 'twin texts', each with the same content but rendered in different codes/languages. Parallelism is the norm for bilingual signage; its obvious function is to give the reader a choice of languages; that is, there is an assumption that the reader is monolingual or has a preferred language. Some of these types are parallel texts for collective and multilingual readership rather than for monolingual individual access. Others are complementary texts, where two or more textual units with different content are juxtaposed within the framework of a textual composition. The juxtaposed texts may be monolingual internally, or they may contain a mixture of languages (code-switching at the sentential or intra-sentential level), and they assume a reader who is bi- or multiliterate or at least has adequate reading competence in both languages. It is also worth considering that in addition to the importance of the verbal level, language alternation in written discourse can also be approached from the perspective of the relationship between the elements of various semiotic devices employed in rendering the proposed meaning. Therefore, when analysing the language of newspapers and advertisements – to remain within the scope of our research – we have to comment on the visual images, nonverbal communication, architecture and the built environment determining our text. Depending on the type of multilingual community and the dynamics of its functioning, elements of global communication coexist with local varieties, but from their form and content we can clearly discern either a competition between varieties as a sign of tension between the language communities themselves, or of monolingualism, which occurs in friendly and harmonious community expression. In short, the written discourse of texts within a community provides visible signs of the societal actors' goals and cultural priorities; and as argued in this paper, these texts can contribute to the construction of the identity of bilingual people.

Sebba (2014) states that "the production and reading of mixed-language texts are to be viewed as social practices [...], as a complex of *literacy practices* situated in particular social historical and linguistic contexts" (p.8). In other words, in addition to how they are created and how they will be read, it is important to know by whom and for whom they are created; i.e. the intended audience. A major concern is that researchers studying written discourse focus on "written texts as text," i.e. sequences of words on a page, rather than studying it in the visual context a reader would encounter it, e.g. style, colours, font sizes, etc. These elements of information can provide "context for interpreting the content of a text" (ibid.,5). Sebba indicates that the focus of research in the field of multilingual written texts should be moved "from text-as-text to text-as-image" (ibid.,11), since particular text types can and do make use of the "potential of the visual medium for complex layouts, multilayering and the use of a range of fonts and graphic devices because they can function as contextualization

cues" (ibid.,12). Considering all of the above, Sebba suggests that the focal point of the analysis of multilingual texts be extended to the "complete text" taking into account its "visual and linguistic whole" (ibid.,12).

## 6 The ethnic press in Australia

During the 1990s there were more than 120 Australian newspapers published predominantly on a weekly basis in over 30 community languages in Australia. This did not take into account the numerous club, church and other organizational newsletters. The number of community language publications, however, tended to decrease (Clyne, 1991). Circulation is frequently dependent on new immigration waves. Newspapers are the only major privately financed community language institutions. Some of them source and reprint articles from overseas publications. This helps readers maintain and develop vocabulary and structures, often introducing them to neologisms reflecting socioeconomic, political and technological change in the country of origin. Some newspapers are written, consciously or unconsciously, in a variety of the language which is representative of its state at the time period of a marginal group's migration. Clyne draws attention to the fact that "advertisements and letters to the editor better reflect the varieties of the community language employed by most speakers in Australia" (p.146).

### 6.1 The Hungarian press in Australia

To ascertain the extent to which newspaper publications of the Hungarian community in Australia have contributed to these functions a basic introduction to the history of *Magyar Élet (Hungarian Life)* is provided, based predominantly on personal communication with Endre Csapó, editor-in-chief, in 2005.

The history of Hungarian media publishing dates back to at least the mid-1940s. When new emigrants landed in Sydney, they were handed a selection of Hungarian newspapers that were 'published' (e.g, typed and photocopied) by Hungarians who had settled in Australia six months earlier. One must remember that this was an era governed by the policy of assimilation in Australia, which lasted until the 1970s and was based on a belief in the benefits of homogeneity and a vision of Australia as a racially pure white nation. This policy drew its rationale from the so-called White Australia Policy. During the last decades of the nineteenth century, concern grew about the level of 'coloured' immigration to the Australian colonies, and many of them passed restrictive immigration legislation. The *Immigration Restriction Act 1901* was passed following Federation in 1901, based on the former colonial legislation. The aim was to limit non-white immigration to Australia.<sup>4</sup> While the preference at this time was for British migrants, others were accepted on the basis that they should shed their cultures and languages and be assimilated into the host population so that they would rapidly become indistinguishable from it. By the late 1950s, although the preference for British migrants remained, and there were still concerns about the homogeneity of Australian society, an open appreciation of the positive contribution of people from a wider range of backgrounds was reflected in public policy (Castles, Kalantzis, Cope, & Morrissey, 1992, pp.43-56). During this period, ordinary immigrants were not encouraged to establish newspapers published in their native language; it was only the clergy who were permitted to do so. Consequently, the first publications were basically the newsletters of Hungarian congregations representing different denominations. They contained

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<sup>4</sup> <https://www.legislation.gov.au/Details/C1901A00017>, <http://www.naa.gov.au/collection/a-z/immigration-restriction-act.aspx>

news and information on local events in major cities where the Hungarian settler population was more substantial; moreover, they aimed to give spiritual support to the people who had voluntarily or involuntarily left their homelands.

Australia is considered to be one of the most urbanised countries in the world (Castles, Kalantzis, Cope, & Morrissey, 1992, pp.120–121), which means that the majority of the inhabitants live in large metropolitan cities, predominantly in Sydney and Melbourne. Then come the other capital cities such as Adelaide, Brisbane and Perth. Hungarian immigrants settled down on the island-continent in that order forming separate Hungarian minority groups. Due to the huge distances, any form of communication with each other was almost impossible. In order to remain Hungarian and to preserve Hungarian language and culture, different associations were organised, and these associations published their newsletters. These publications were the forerunners of the later newspapers. The first real daily newspaper, *Független Magyarország (Independent Hungary)*, (original title: *Dél Keresztje (Southern Cross)*) was established by the Jesuit priest Ferenc Forró in Sydney in 1951, and edited by Kázmér Nagy, who became the proprietor of the paper in 1954 (Kunz, 1997, p.187). It did not have a large circulation, although it increased due to the new immigration wave of the late 1950s. In 1957, a recently arrived Hungarian entrepreneur established a newspaper called *Magyar Élet (Hungarian Life)* in Melbourne, relying on the advertisements of local businesses, but it was only able to survive because it was printed on the owner's press. A decisive change took place in 1977, when a retired Hungarian businessman by the name of János Ady bought the paper and changed its content and attitude. In 1964 Sydney associations published a monthly newsletter called *Ausztráliai Magyarság (Hungarians in Australia)*, however, the paper could not be maintained. Endre Csapó, the editor, decided not to distribute it free of charge any more, but instead introduced a subscription rate. He employed a publicist, increased the number of the pages and worked with enthusiastic volunteers. He was not paid for his work. The year 1978 marked an important milestone in the history of the Hungarian press in Australia with the merger of the weekly *Magyar Élet (Hungarian Life)*, which had been published in Melbourne for twenty years, and the monthly *Ausztráliai Magyarság (Australian Hungarians)*, which had been published in Sydney since 1964. With this merger, a countrywide weekly newspaper for the Hungarian minority in Australia was established.

In order to have a national Hungarian newspaper in Australia, Endre Csapó (with his newspaper) was prepared to join the Melbourne paper in 1978 without becoming an owner of the newly established newspaper. With this merger the editors' and publishers' only aim was to provide the Hungarian community in Australia with a weekly newspaper that reflected its way of thinking and mentality. Four years later, in 1981 Attila Márffy became the proprietor of *Magyar Élet (Hungarian Life)*. During the next 25–30 years, it had a circulation of 3,800 copies, with approximately 10,000 readers; quite a reasonable number, especially if we consider the size of the Hungarian community in Australia. The Hungarian community, however, was an ageing minority, so the number of subscribers and readers steadily declined. The intended readership was the generation which had been born and raised in Hungary. The newspaper was delivered to its subscribers by post, and was also available at numerous newsagencies in Sydney and Melbourne. The editorial office was situated in Melbourne. The proprietor, Attila Márffy, was in charge of the design, whereas Endre Csapó, the editor-in-chief, provided the paper with editorials and other articles. The publication was generally 20 pages long; however this increased to 28 pages for the Christmas issue. The layout mostly consisted of five columns, but some pages were only divided into three or four columns. It also shared the common ills of publications of this type, one of which is stylistic dichotomy. This means that in addition to containing articles, stories or anything written in Australia, articles, advertisements etc. were

sourced from foreign publications. Obviously, this resulted in differences in language and content. The typological setting of the paper was unified as every article was printed in the same type-size. Some of the advertisements and headlines, however, showed a difference, because they were printed either in italics or in boldface. Not the whole repertoire of the typographical elements was exploited in the paper. Although it was in black and white, the pages were diversified with photographs usually with, but sometimes without captions.

In spite of the weaknesses mentioned above, *Magyar Élet (Hungarian Life)* like other minority newspapers, had a relatively high readership for many decades. Whereas nation-wide newspapers are produced by full-time journalists using modern technology and media techniques, minority newspapers are generally family enterprises with relatively poor computer and publishing facilities. While the former are easily accessible in electronic format, the latter are usually not. Nevertheless, in order to meet the requirements of modern times, from the 14<sup>th</sup> February, 2008 the only Hungarian weekly in Australia was made available on the internet in order for the younger generation to access it. Ten years later, together with the 27<sup>th</sup> December, 2018 issue the following statement was published by Márffy, the proprietor of *Magyar Élet (Hungarian Life)*, on the homepage of the weekly:

The increasing number of obituaries in the newspaper clearly indicated the ageing nature of our readership. Younger generations, on the other hand, are not interested in printed papers any more, they obtain information via computer sources, moreover they communicate with each other with the help of computers. For decades, the only source of information on events and on their reports for readers was the weekly, but today there are many other resources. The decreasing number of subscribers and advertisements placed in the newspaper reached a point when the income could no longer cover the costs of printing and posting the weekly. [...] The editorial team of the weekly have a clear conscience but are saddened to say farewell to its readership.<sup>5</sup> (Translation by the author)

Editor-in-chief Csapó, who passed away on 24 June, 2019 at the age of 97, summarized the mission of the weekly as follows:

*Magyar Élet (Hungarian Life)* has fulfilled its mission. It was established when there was a great need for it, and it ceases when all the possibilities that could have an impact on the Hungarian social life here disappear. It has been a manful act to preserve some part of the nation to be Hungarian. Thanks to everybody who has contributed to this.<sup>6</sup> (Translation by the author)

One of the editors, *Erika Józsa*, stated in the final issue that

the weekly has served the Hungarian community in Australia for 61 years. [...] It was established due to the persistent longing for the homeland, and the constant pursuit for the national identity, which was lost when crossing the Hungarian border in the 1940s, 50s or 80s. There was a need for Hungarian content to form a Hungarian community in a foreign country, where a foreign language was used, people had a different way of thinking and values.<sup>7</sup> (Translation by the author)

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<sup>5</sup> <http://www.magyarélet.net/irasok/elbucszuk-a-magyar-elet>

<sup>6</sup> <http://www.magyarélet.net/irasok/elbucszuk-a-magyar-elet>

<sup>7</sup> <http://www.magyarélet.net/irasok/elbucszuk-a-magyar-elet>

## 7 Aims, approaches and data

Reiterating the scope of this paper to investigate written mixed-language discourse following the approaches discussed in detail above (Kress, 2011; Sebba, 2012, 2014), the resources that have been used include two issues of the weekly published by the Hungarian community in Australia. They provide the source for this research that studies intentional code mixing in light of the trends highlighted in the previous section. Contributors to these weeklies may find it an important and appealing alternative to rely on resources provided by more than one language. Their multilingual language usage in everyday oral communication may differ from their written language uses; written language discourse is simply seen as another situation where they interact with other bilingual people. This research investigates and focuses on linguistically mixed written discourse, i.e. the mixed-language practices which characterise the weekly, in order to observe how these manifestations contribute to a community's multifaceted identity. Sebba (2014, p.7) states that a multilingual text, for example the newspaper of a minority community, is "the product of a multilingual culture," in other words "the collective property of a multilingual speech community". As written texts, they can be characterized by the two conditions of permanence and reproducibility, where the distinction between a spoken and a written discourse does not necessarily imply the expression of permanent versus non-permanent linguistic relations between the audience, or readership.

## 8 *Magyar Élet (Hungarian Life)*: a multilingual text analysis of the only Hungarian weekly in Australia



Figure 1. Invitation for a harvest ball  
[http://epa.oszk.hu/02200/02228/00157/pdf/EPA02228\\_Magyar\\_Elet\\_2008\\_06.pdf](http://epa.oszk.hu/02200/02228/00157/pdf/EPA02228_Magyar_Elet_2008_06.pdf)

Figure 1 illustrates an invitation announcing the event of a harvest ball; a traditional aspect of country life originating from the celebration of a successful autumn vintage. This event is organised by the *Hungarian Social Club*, whose name is partly provided with parallelism, i.e., the Hungarian equivalent of the word *Hungarian*, which is *Magyar*, is also included; however, complementarity is characteristic of the multilingual text. The mainly Hungarian text includes the address of the event in English, which is quite logical, since a road's name loses its relevance when translated into a different language,

and accordingly, the Hungarian order of an address (post code, town, name of street, number of house) would geographically confuse and mislead people in Australia. The name of the club and the event is represented in large bold uppercase font to attract the reader's attention to the two most important pieces of information.

  
**HUNGAROFEST**  
**22—23—24 FEBRUARY 2019**


 Melbourne-i Magyar Központ  
 760 Boronia Road  
 Wantirna

**Programok:**  
**a rendezők részéről:**  
 étel- és italfelkészítés, zene-bona, ének, tánc,  
 kézműves programok, gyerekprogramok  
**a felnőtt vendégek részéről:**  
 evés-ivás, dalolás, táncolás, nevetés, vidámság,  
 jó beszélgetések régi ismerősökkel, bűvös kocka kirakás  
**a gyerekek részéről:**  
 ugrálóvárban ugrálás, hintázás, szappanbuborék-fújás,  
 arcfestés, szaladgálás, viháncolás, rosszakodás, kifáradás

A közismert Melbourne-i zenekarok mellett a szórakoztató zenét az  
**ESSZENCIA**  
 6 tagú különleges magyar zenekar szolgáltatja.  
 Koncertjeiken játszanak eredeti Kárpát Medencei népzene, de előadnak Bach és Bartók számokat is.

A Rendező Bizottság kéri azokat a kedves honfitársaikat, akik tudnak segíteni a Hungarofesten, hogy szíveskedjenek jelentkezni  
 Marót Márti Tel. 0418 553 193

Figure 2. Poster of a traditional Hungarian event called *Hungarofest*  
<http://www.magyairelet.net/wp-content/uploads/2018/12/Magyar-Elet-2018-dec.-27.pdf>

Figure 2 illustrates a traditional Hungarian event called *Hungarofest*, which is held in Melbourne annually. Multimodality characterises it insofar as both linguistic and non-linguistic features contribute to the compilation of the information leaflet. The name of the event, *Hungarofest*, is emphasised in two ways: through type face and font size on the one hand and through the colours of the Hungarian flag (red, white and green), on the other. In addition to the name of the event, which is a compound word of Latin origin, it is the date and the venue of the event which are provided in English. These elements of information aim to additionally provoke interest in non-Hungarian readers. The accompanying images of a dancing couple wearing traditional Hungarian folk costumes and a display of Hungarian embroidery also portray the tone of the event. The detailed description of the program is provided in Hungarian, in which two interlingual contact linguistic manifestations are worth mentioning. In the sentence:

*Koncertjeiken játszanak eredeti Kárpát Medencei (sic!) népzene, de előadnak Bach és Bartók számokat is.* [Concert-Poss-PI-Sup play-PI original Carpathian

Basin-deriv folk music-Acc, but perform-PI Bach and Bartók piece-LinV-PI-LinV-Acc too]

The word order reflects the word order of the English sentence (SVO). In Hungarian SOV word order is preferred. In the phrase *Bach és Kodály számokat* the English phrases “musical composition, musical piece” must have motivated the choice of words because in English they can denote both classical and popular pieces of music. In comparison the Hungarian term (*zene*)szám generally refers to popular music and the term *zenedarab* would be the appropriate term in the given context.

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**NO WIN, NO FEE**

A LEGNAGYOBB HOZZÁÉRTÉSELÉS GONDDAL VEZETJÜNK LE  
JOGI ÜGYÉT BÁRMILYEN BALESETI KÁROSODÁSÁVAL  
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Figure 3. Business advertisement

<http://www.magyarélet.net/wp-content/uploads/2018/12/Magyar-Élet-2018.-dec.-27.pdf>

Figure 3 is an advertisement sourced from the December 27, 2018 issue of Australian *Magyar Élet*. It includes both Hungarian and English language texts which are – to a certain extent – kept visually separate. The top section, including the names of both the business and its representative, and the particularities and the philosophy behind the services they offer, is entirely in English. The bottom section providing the URL link to their homepage, postal address, telephone number and the email address of the office is also in English. Mention must be made of the facts that the words ‘email’ and ‘fax’ are spelled identically in the two languages, and the word “telephone” is spelled in Hungarian, however the phone number does not indicate an international country code. Additionally, as mentioned above, a street name loses its relevance when translated into another language, and besides this it does not make much sense, nor is it customary to follow the Hungarian order of an address in Australia. The middle section of the advertisement describing the activities of the business is chiefly in Hungarian. The closing remark in the advertisement: “We speak both Hungarian and English” has two spelling errors: the words “magyarúl” and “angolúi” should be spelled “magyarul” and “angolul” respectively. The three sections are supported visually inasmuch as that the English text is mainly in bold font, whereas the Hungarian text is not.



Figure 4. Statement posted on the website  
<http://www.magyarelet.net/wp-content/uploads/2018/12/Magyar-Elet-2018.-dec.-27.pdf>

Despite the final issue of the weekly including a large volume of parting salutations, retrospective memories and acknowledgements provided by its editors, subscribers and readers, Figure 3 refers to the future: “The webpage of *Magyar Élet* (*Hungarian Life*) will not disappear, there will always be something to read on it. It will be worth opening.” With this statement, contributors to the weekly aimed to convey that language and cultural maintenance efforts in the community will unquestionably continue.

## 9 Conclusion

The present paper, using resources selected from two issues of a weekly published by the Hungarian community in Australia, describes and analyses written mixed-language discourse in adherence to the novel approaches initiated by Kress (2011) and Sebba (2012, 2014). The new theoretical framework suggests a form of multimodal approach to multilingual text types and considers the linguistic properties together with the visual and spatial relationships of languages on a page. The investigated texts include intentional language alternation with instances of parallelism and complementarity, which are intermittently supported by graphic devices. In conclusion, it can be stated that this deliberate code mixing reflects the special language use and multifaceted identity of the members of the Hungarian community, which are generated by the dissimilar cultural environments, and which are assumed to have contributed to the language and culture maintenance efforts of the community. The weekly, however, posted its last publication in December, 2018.

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# COMMUNITY, FAMILY, AND ZOMBIES IN CARGO (2017)

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“My town is broken.  
From this view, I see the end.  
Below, they gather.”

Ryan Mecum *Zombie Haiku: Good Poetry for Your ... Brains*

## Abstract

The zombie apocalypse is one of the widespread and popular tropes in apocalyptic and post-apocalyptic fiction and film. Having started out in the 1960s as the embodiment of abject horror, with overtones of reflections on consumerism and racism in American society, the zombie has grown in complexity to signify issues like isolation, self-doubt, identity crisis and environmental challenges in contemporary society. The present study is going to examine the themes of otherness, fatherhood and survival in the 2017 Australian film *Cargo*.

## 1 Introduction

The zombie apocalypse is one of the increasingly popular ways in which writers of fantasy, horror or science fiction envision humanity's end. “Terminal visions,” as Warren Wagar (1982) calls these narratives, have been part of human culture as far back as cultural traditions go, with the Sumerian version of the story of the flood probably being the earliest literary example of the imagined large-scale destruction of the human race. The apocalypse as storyline is strewn across a wide range of genres, from mythologies and religious texts (like the Book of Revelations in the New Testament, or the various incarnations of Ragnarok in Norse mythology), to modern and contemporary genres like fantasy, horror or science fiction. Apart from the extrapolative, prophetic element “apocalypse [is] [...] one of the fictions which we employ to make sense of our present” (Seed, 2000, p.11). The present study is going to examine how the 2017 Australian film *Cargo* reflects on issues of community and isolation, survival and self-sacrifice, monstrosity and fatherhood, analyzing the film along the questions of identity loss, communication, and the divide along the ethnic lines of white / indigenous Australians.

## 2 From abject horror to intercultural communication: the monster in Western popular culture

In addition to providing a metaphorical language to address political, social, or cultural issues otherwise difficult to confront, narratives of the apocalypse also provide

a canvas upon which to project the individual or collective anxieties of a given time and place. Most of the stories reference traumatic experiences, and work on various levels to produce a complex tapestry of loss and desperation. H. G. Wells's aliens in *The War of the Worlds* are clear analogies of British colonial arrogance—Wells himself makes the connection in the opening chapter of the novel—but the deep-seated fear of the fall of the British Empire is also encoded in the demise of the Martian invaders. The novel's narrator and protagonist, on the other hand, experiences the loss of home, friends and family, culminating in utter isolation within a dead and deserted London. The nuclear apocalypse envisioned in countless stories after World War II clearly maps the technophobia directed against the new weapons of mass destruction, especially as international and intranational tensions mount during the Cold War, just as the contemporaneous body snatcher narrative—where alien entities replace humans, especially those we love and cherish—comments on the fears of an impending Communist invasion, with friends and family not being what they pretend to be. These narratives, especially when told from a child's point of view as in Philip K. Dick's "The Father-Thing," turn the familiar into the site of possible mortal danger.

Many (post)apocalyptic narratives contain an element of the monstrous, acting as the focal point of the fears. These can be alien horrors, monstrous phenomena (climate catastrophes or extraterrestrial threats like asteroids), technological threats (evil robots or malevolent artificial intelligence), or biological death-bringers, depending on where the emphases lie within the given socio-cultural milieu that the narrative emerges from. Zombies have become one of the regular household items in this menagerie of horror. They belong to the category of monster which Noel Carroll (1990) remarks "are interstitial and/or contradictory in terms of being both living and dead: ghosts, zombies, vampires, mummies, the Frankenstein monster, Melmoth the Wanderer, and so on" (p.32). In a similar vein, Jeffrey Jerome Cohen (1996, p.6) posits that the liminality of the monster signals a "category crisis," and its hybridity results in "a form suspended between forms that threatens to smash distinctions" (1996, p.6). Zombies, like vampires, werewolves and other similar beings are the monstrous as contained within the human body, a horrendous potential, so to speak, which is freed as a result of a transformation that ultimately leads to the loss of identity for the person involved. These monsters are also parasitic—or cannibalistic, if we acknowledge their human origin—, destroying not only their host, but also posing a danger to the wider human community: vampires feed on blood, werewolves and zombies on human flesh. The bite, the abnormal and cannibalistic entering of the human body, that usually effects the infection and subsequent transformation, has strong sexual overtones, and marks the monster as transgressive and abject in the sense of cultural taboo.

It is interesting to note that like many cultural icons these monsters have their peculiar development arc through the decades. The most notable example is the vampire, which started its career in European popular culture as the abject monster in Polydori's *The Vampyre* (1819), underwent a major change in the 1960s, and emerged as a metaphor for the marginalization and dehumanization of transgressive gender identity and sexual attraction, especially in Anne Rice's novels. This trajectory of humanization led to the merger with the Byronic hero in the 1980s to gradually produce figures like Angel from *Buffy, the Vampire Slayer* or Edward from the *Twilight Saga*, exploring models of attraction and interaction for young adult readers and viewers. Finally, in films like the mockumentary *What We Do in the Shadows*, co-written and directed by Taika Waititi, the vampire community emerges as a more general type of cultural and personal otherness, as the film explores attempts at communication with and integration into the host culture of New Zealand.

The figure of the zombie is on a similar trajectory, although the range of issues the character may be able to address is slightly different from that of the

vampire. As the vampire has its roots in European folklore, the zombie “was a thing of mythology and folkloristic ritual, a much maligned and little understood voodoo practice primarily from the West Indian nation of Haiti” (Bishop, 2010,p.37). The modern zombie was born in 1968, and George Romero’s low-budget horror film *The Night of the Living Dead* is often regarded as the origo and model for all subsequent films in the genre of the “zombie invasion narrative” (Bishop, 2010, p.94). Bishop (2010) posits that although Romero undeniably built on the preceding tradition of monster films, the resulting collage redefined the figure of the zombie “in four key respects: (1) they have no connection to voodoo magic, (2) they far outnumber the human protagonists, (3) they eat human flesh, and (4) their condition is contagious” (p.94). Condition four in particular opens up the genre to science fictionalization, that is, a process of rationalizing the incomprehensibly mysterious. These characteristics also integrate the zombie narrative into the wider group of the (post)apocalyptic texts, and as Bishop (2010) says, reiterating the critical consensus, the new zombies became “a metaphor for the modern age [...] present[ing] audiences with the true monster threatening civilization: humanity itself” (p.95). I would further argue that its peculiarities make this particular monster especially suited for commentary on individual trauma and questions of identity crisis and isolation, and will elaborate on this point further on. Interestingly *The Night of the Living Dead* had another aspect, which seems trivial today: Ben, the protagonist was played by African American actor Duane Jones. His character survives the apocalypse only to be mistaken for a zombie and shot dead at the end of the film. While casting an African American actor as the lead in an otherwise not African American themed film was not self-evident in the 1960s, the ending may also be decoded as a poignant commentary on race relations at the time.

The Romero zombie still embodied the abject monster, as it was devoid of anything usually associated with intrinsically being human. It lacked identity, memories, intelligence, and a living body, and was a human being reduced to a decomposing corpse animated by its cannibalistic desire for human flesh, which a number of critics, including Bishop (2010), have interpreted as a critique of American consumer society. Several films feature zombies hibernating until they get into proximity with their prey, further diminishing their ‘life’ and their agency to a simple reaction to living beings. Despite their seeming simplicity Romero’s creatures engendered a whole new category of horror movie, and in the subsequent years the new archetype was established in global popular culture through countless iterations of the same theme. Since a well-known template lends itself more easily to subversive approaches, the zombie, as mentioned earlier, has been on a similar trajectory of humanization as the vampire, with comedic depictions appearing quite early on (Bishop, 2010, p.158). Yet until the 2010s the zombie element retained its basic dehumanized characteristics, in films like *28 Days Later* (2002), or *Zombieland* (2009), the focus remains on the humans, with the zombies acting as the Otherness that threatens to destroy the world as we know it.

Although many films and series retain the fundamental narrative structure of human survival versus zombie threat even today-it is enough to mention the immensely popular *The Walking Dead* (2010-) series, or films like *World War Z* (2013)-the 2010s saw a marked shift in the depiction of the monster. Series like *iZombie* (2015-), *Santa Clarita Diet* (2017-), or films like *Warm Bodies* (2013) and *The Girl With All The Gifts* (2016) opt for a more nuanced approach to the character, investing zombies with intelligence and memories, while upholding their bodily transformation and desire for flesh, to investigate questions of self, identity, battling with addiction, and trying to navigate as ostracized Other in contemporary society. Since the examples I mention above retain the zombie’s threatening nature, these narratives also comment on the options human society in general, and individuals in particular, have in trying to

cope with changes that threaten to uproot the social order as we know it. Thus they present an opportunity to comment on global migration, climate change, isolation, interpersonal and intercultural communication, and other phenomena causing anxiety in present-day society.

### 3 Fatherhood, survival and community in *Cargo* (2017)

#### 3.1 The apocalypse in Australian cinema

Australian cinema has its share of (post)apocalyptic movies, with the *Mad Max* films probably being the most well-known examples internationally. Using the Australian Outback as their setting, these films usually fall into the category of “survivalist fiction” (Edward James [2000, p.53] referencing and citing John Clute), which he explains as narratives set “in the backwoods of America,” with social order atomized only to provide a clean slate for re-establishing a traditional patriarchal framework. Mick Broderick (1993) notes that these stories feature survival as their “dominant discursive mode,” and function as fantasies of masculine nostalgia through positing their lone, male hero as the viewpoint character of the film. The longing for a fictitious, simple and male-centered golden age lends an almost pastoral layer to films like *I Am Legend* (2007), or *The Book of Eli* (2010), both robinsonades where the patriarchy is finally restored unchallenged by the changes of modern society. *I Am Legend*, for example, opens with a 20-minute sequence which depicts the seemingly idyllic life of Robert Neville and his dog, Sam, in a deserted Manhattan. Although there is menace lurking at the edges of this bright summer day, both as the external threat embodied by the light-sensitive post-human monsters, and the internal trauma suppressed by Neville’s brain, the utopian layer is undeniably there. It shows the complexity in which these narratives approach regression into previous historical and economic systems, not only with repulsion, but also with a certain degree of sentimental desire. Similarly, Australian post-apocalyptic films like the *Mad Max* series – with the exception of the fourth installment –, or *The Rover* (2014), while mourning for human civilization, also glorify the figure of the lonely male, unfettered by societal expectations.

*Cargo* (2017), directed by Ben Howling and Yolanda Ramke, falls into this category of survivalist fiction; it is based on their 2013 short film of the same title. We enter the narrative after the zombie apocalypse has happened. Society is atomized, a large percentage of the population has transformed into brainless corpses—probably due to an infection, although the cause is never detailed—feeding on the few survivors, with everyone fending for themselves. We are introduced to a nuclear family, a father (Andy, played by Martin Freeman), a mother (Kay, played by Susie Porter) and their infant daughter Rosie, who have successfully avoided the infected by living on a riverboat, and staying away from the mainland. The viewer meets them in a stereotypically idyllic scene: the father is fishing, the mother is taking care of the child on a beautiful summer day. Gender roles are assigned and fulfilled according to the patriarchal script for the nuclear family: the man, the paterfamilias, provides for his family while the woman occupies a nurturing position. The aim of their journey is to get to a military base, hoping that a cure for the disease has been found, or that at least the base might provide a safe haven for them from the infected. They still have some way to go when we join the narrative, and as their food is running out, Andy and Kay are forced to forage for edibles in a foundered ship, where Kay is bitten and becomes infected. With 48 hours until she herself is transformed into a zombie, Andy tries to get her to a hospital. Avoiding a zombie standing in the road they suffer an accident, where Kay turns and bites Andy, who in turn kills zombie Kay. The family

quest for survival turns into a race with time, as a doomed Andy embarks on a journey to find safety and a foster family for Rosie before he himself is transformed.

Parallel to this storyline we also follow Thoomi (played by Simone Landers), an indigenous girl who is unable to leave her transformed father behind to go and join her mother and a group of indigenous people who have withdrawn inland and are battling the zombie plague with considerably more success than white Australian society. Andy and Thoomi's paths cross twice: first, when her zombie father causes the road accident that ultimately leads to Andy's infection, and second when Andy finds the girl trapped in a cage, used by the psychopathic Vic (played by Anthony Hayes) as bait to attract zombies, whom Vic then shoots. The second encounter results in Andy's and Thoomi's alliance, and by helping each other Andy finds a family for his child, and Thoomi finds her way back to her community. While the film doubtlessly posits humans as "the true monster threatening civilization" (Bishop, 2010, p.95), on the personal level it explores questions of fatherhood, and deconstructs the colonial prejudice of assigning European cultural values to a higher level than Australian indigenous practices of life.

### 3.2 Parenthood and gender roles in *Cargo*

Parenthood in general, and fatherhood in particular occupy a central position within the film. We are presented with several parent-child relationships: Andy, Kay and Rosie, Thoomi and her parents, and the family Andy sees on the shore in the first minutes of the film, all provide different options for facing the challenge of the zombie apocalypse. It is ultimately the indigenous family which shows the only viable alternative by embracing the community, and "follow[ing] the old ways," as Etta, a white teacher Andy meets, points out (*Cargo* 2017). Ensuring Rosie's safety is the prime objective of both Andy and Kay, and their deepest fear is their failure to protect her from coming to harm. Kay does not really function as an agent in the narrative, her role is rather to catalyze the situation through her infection and subsequent traumatic absence. The situation Andy is put into extrapolates the fears every parent faces about successful parenthood and providing for their child. Rosie both embodies a specific child, and also becomes synonymous with the concepts of hope and the possibility of a future. In this sense Andy's quest evokes the father-son journey of *The Road*, a 2006 novel written by Cormac McCarthy. Both fathers are desperate to ensure the survival of their child, while both of them are on the verge of death; the Man in *The Road* suffers from an undisclosed disease that causes his slow physical deterioration, while Andy is, as mentioned, living on borrowed time after his infection. The quest for survival is exacerbated by the fact that zombie narratives play with the Jekyll and Hyde trope, and while Andy has to fight off the outside threat, he also has to constantly face and battle the monster within, a fight he is bound to lose.

*Cargo*, similarly to *The Road*, is marked by the absence of the mother on several levels: Kay's death leaves Andy as the only caretaker of Rosie, and while tragic, it just marks her final objectification, having been denied a say in major decisions, and ultimately refused to end her life as her loss of self is imminent. The choices that Andy makes against her will have lethal consequences for his mother and for her, as well, and eventually lead to the destruction of the family. Thoomi's mother, on the other hand, is absent because Thoomi consciously evades her in order to be able to stay with her zombified father, unable to let go despite the rational acknowledgment that she cannot bring him back. Her quest is to realize that her father, and 'white civilization' to which he binds her, has to be left behind, and she has to find a way to accept her own culture and history in order to rejoin her community. Howling and Ramke stated in an interview with Peary (2018) that

having the Indigenous component in the film, incorporating that culture, looking at Indigenous survivors, there was just a layer there that we thought was quite interesting in having an English man coming into the orbit of these Indigenous characters who are thriving. Just a reflection of Australia's own colonial history which is all quite dark and unresolved and ever-present. (Peary, 2018)

This colonial metaphor runs through the film in several ways. On the one hand, all characters are either white Australians or indigenous Australians; there is no ethnic diversity beyond this dichotomy. The film's portrayal of women is divided along this line, as well. White women are depicted as weak and vulnerable: as mentioned earlier, Kay clearly conforms to patriarchal gender expectations by her subordinate position within the family, and her transformation just marks the endpoint of this trajectory of objectification. Etta, the elderly teacher Andy encounters on his quest for a caretaker for Rosie, has lost her students to either the disease or the bush, and is presumably dying from cancer. Lorraine, the young woman the psychotic Vic introduces as his wife, turns out to be held captive by him, restricted in her movement, and sexually and emotionally exploited and tortured by the man. The unnamed mother of the family on the shore dies without objection when her infected husband decides to kill his wife and children before committing suicide himself. She is not given a choice to continue caring for her children alone, or to continue living when her husband is doomed to die. Finally, Rosie is an infant, unable to fend for herself. Indigenous women, in contrast, are depicted as able agents of their own narrative. Thoomi, as a young girl, is shown to navigate the zombie-infested territory without major problems, surviving the proximity of her transformed father, even caring for him by providing him with meat to eat. Thoomi's mother, while looking for her daughter, is shown as an able warrior, hunting and killing the infected without having to rely on male help and guidance.

### **3.3 Cultural background and apocalyptic coping strategies**

One of the major differences between the white and indigenous characters is their degree of acceptance of the cataclysm: Andy hopes for the safe haven of the military base, and a possible cure for the disease; both are denied as he finds the base destroyed, and the soldiers turned into zombies. Vic is hoarding jewelry he takes off the zombie corpses in preparation for when the world is normalized again, unable to accept that 'normality' as he knows it will never return. The zombies are frequently shown with their heads buried in the ground, or standing in dark places, their faces turned towards the wall, marking their inability to see and accept that the world has changed around them. When society breaks down, the white population is left without an alternative to fall back upon. The indigenous population, on the contrary, is seemingly much better prepared to meet the challenge of the human monsters; they react swiftly to the invasion and develop effective strategies to defend their community against the threat, and preserve their culture intact. The film argues for the superiority of the aboriginal cultural practices, and shows relying on native customs and rituals as the only viable option to survive the catastrophe. The postcolonial overtones of the film point to the fact that the existential threat only comes as a surprise to the colonizers, as the colonized have been facing and battling the prospect of physical and cultural annihilation since Australia's 'discovery' and subsequent colonization in the seventeenth century.

The aboriginal and the white Australian elements are also juxtaposed in terms of their approach to community and communication. White society is atomized into solitary humans or nuclear families which renounce a larger communal existence in favour of isolated entrenchment, and communication gives way to paranoia. Andy is the only character who would be willing to connect, and attempts to do so, but meets

repeated hostile rejection from the white Australians he meets—with the exception of Etta—, first from the family on the shore, then from Vic. Despite the setbacks, and despite his relative openness, he exclusively seeks ‘white alternatives,’ and only considers Thoomi and the indigenous community as a possible solution to Rosie’s survival when all other options have been exploited. It takes their shared journey, and the trust they build, to allow Andy to humanize the girl, and finally entrust her with the care of his daughter. The aboriginal survivors, on the other hand, have established a working community in Wilpena Pound, a valley in South Australia surrounded by a crescent of mountains, and the closing shots show a true pastoral idyll, without the dystopian overtones of the movie’s opening. Their success in surviving not only stems from the skills and experience that make them proficient navigators of the cataclysmic environment, but also from the willingness to cooperate, and to use the community’s collective strength to counter the zombie threat. Traditional aboriginal body paint signals belonging to the group, apart from functioning as protective magic against the infected. When towards the end of their shared journey Thoomi paints marks on Rosie to mask her scent from the zombies-Andy, by then far into the process of transformation, is no longer in need of protection—, it also signals the integration of Rosie into the aboriginal community.

Andy’s quest thus combines coming to terms with his role as single parent, and facing the fear as father that his identity does not only include the nurturing parent, but also the potential of the threatening monster. His final triumph is transforming the lethal threat into a tool that ensures the survival of both Thoomi and Rosie, as they use a zombified Andy as a pack animal to transport them to safety after he succumbs to the infection, dangling a slab of meat in front of his nose as motivation to keep him going. Andy’s British background emphatically places him in the position of the colonizer, and the film subverts the colonial narrative by interchanging the markers of conqueror and victim. The dehumanization of Andy by objectifying him and depriving him of his intellect, while simultaneously investing the indigenous characters with agency and humanity, allows for a reparative reenactment of the colonial narrative. Luckily the film does not stop at transposing roles, but also offers a disruption and dissolution of the indigenous-white Australian dichotomy by a fusion of the categories through the figure of Rosie. Her integration into the utopian community presents a possibility where cooperation, community, intercultural communication and peaceful, non-exploitative coexistence with the environment produce a viable and livable future.

#### 4 Conclusion

*Cargo* uses the zombie apocalypse as a metaphor to call attention to the global economy’s detrimental effects on humanity. It uses the zombie trope in line with Romero’s *Living Dead* films to comment on the cannibalistic and suicidal consumer practices of modern society. The post-apocalyptic world presented in the film is divided along ethnic lines, and clear preference is given to the cultural practices of the indigenous population in confronting the plague. The strategies of the white survivors, on the other hand, are shown as ineffective, as their atomization into nuclear families, isolation and unwillingness to cooperate inevitably lead to their demise. Fatherhood is challenged through the loss of the mother, the choices and moral dilemmas a single father faces in an extremely hostile environment, and the identity crisis communicated through the zombie infection. Andy’s quest to find a home and a caring family for Rosie leads him to overcome prejudice and entrust his daughter to the indigenous community. This instance of intercultural transaction not only marks a subversion and reenactment of the colonial narrative, but also signals moving beyond the colonizer-colonized dichotomy by embracing cooperation, intercultural communication and integration as the only means of survival.

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# MARMITE MATTERS: MARMAGEDDON AND COPING WITH DISASTER IN NEW ZEALAND

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## **Abstract**

Among its other devastating impacts, the February 2011 earthquake in the New Zealand city of Christchurch damaged and closed the only factory producing the local variant of Marmite (a dark, salty yeast-extract spread and noble by-product of beer brewing). Stocks of this staple of the New Zealand diet dwindled and then ran out, bringing on the aftershock of 'Marmageddon'. Alongside Vegemite, Marmite is of central culinary and cultural importance to New Zealanders; it is a part of the country's popular cultural fabric ('kiwiana'), a literal consumption of national identity, and a product that is 'world famous in New Zealand' but barely sold anywhere else. This paper discusses the importance of Marmite (as well as Vegemite) in the New Zealand diet and maps the development and conclusion of the Marmageddon crisis. Marmageddon was a big deal; it lasted over a year and was discussed in high politics and in the national media as well as on an everyday level. Marmite-loyal New Zealanders had to make some difficult choices between hoarding supplies, rationing out doses, doing without, or substituting their preferred spread with Vegemite, which is made in Australia.

## **1 Food and national identity**

The acquisition, preparation, and consumption of food by humans is more than just a matter of biological survival; it also involves decisions determined by the use of technological capabilities, nutritional and economic circumstances, and the cultural and symbolic value which people and communities put into food. In addition to providing nutrition, food helps tell us who we are. It is "through such pathways food takes shape as a decisive element of human identity and as one of the most effective means of expressing and communicating that identity" (Montanari, 2006, pp.xi-xii). As a key marker of identity then, food is

extremely affective; its taste on our individual tongues often incites strong emotions, while the communal, commensal experience of such sensations binds people together, not only through space but time as well, as individuals collectively remember past experiences with certain meals and imagine their ancestors having similar experiences. (Di Giovine & Brulotte, 2016, p.1)

Admittedly, the power of belief in endowing a particular food with exalted national properties is a "coercive collective act" (Barthes, 1973, p.59), which limits individual agency in deciding what food should be considered the "national" one in favour of some kind of collective imagining enforced through the media and other

channels of socialization. And there are significant communities within any national population that would hardly ever eat, or who would flat out reject, the food that is supposed to embody the national diet. After all, national populations change and are subject to foreign influences, so diets change along with them. Nonetheless, food does play a central role in constructing and defining collective identities (T. Wilson, 2006, pp.14, 15, 22). The importance of food is particularly acute for members of a community living beyond its borders; this is evident in the plethora of restaurants, pubs, and online and bricks-and-mortar food shops catering to specific immigrant populations, providing them with their desired form of nutrition as well as a sentient connection to the homeland (Lugosi, 2013, p.41).

If “[w]hen we talk about what we eat, we talk about what we are” (Vester, 2015, p.2), then threats posed to what is widely considered to be a “national food” – such as a problem with the supply of ingredients or manufacturing capacity leading to a significant change in recipe, or the food’s absence in supermarkets, pantries, and kitchens – can result in widespread feelings of concern and even a sense of national catastrophe. This paper will discuss (1) the importance of Marmite, which is a yeast extract used primarily as a food spread, as a national food in New Zealand and (2) the public discourse that resulted from its temporary halt in production as a result of the February 2011 Christchurch earthquake, which put Marmite’s sole site of manufacture out of operation from November of that year until March 2013, when normal Marmite supply resumed.

## 2 Marmite matters

Marmite is a food spread with a salty and savoury taste made from surplus brewing yeast, also known as “top fermentation” or “beer scum” (McAlpine, 2013). Its most common application is in sandwiches or on toast and crackers, usually with butter. It is also used as an ingredient in recipes and even as a drink, although the latter activity is not common practice. In New Zealand, Marmite is made by the Sanitarium Health and Wellbeing Company at one location in Christchurch. Originally a British product which was sold in New Zealand under licence, from the 1930s Marmite began to be experimentally manufactured with locally-sourced ingredients and with an altered recipe, which saw the addition of caramel and sugar as well as a “secret blend of herbs and spices” (“Frequently Asked Questions”, 2019) to produce by the 1940s a discernibly different product in taste, texture, and colour from its British parent (“Dig Deep”, 2019). In fact, New Zealand’s Marmite very closely resembles Vegemite, a food spread also made from yeast extract, which has been made in Australia since the early 1920s. Both spreads are very popular in New Zealand. Already a popular spread by the start of the Second World War, Marmite was distributed to New Zealand soldiers serving overseas during that conflict, just as Vegemite was to their Australian counterparts, and it was promoted as a part of the war effort and a healthy choice for soldiers and civilians alike (“Dig Deep”, 2019; Richardson, 2003, pp.61-62). For good reason, Marmite continues to be a central part of New Zealand soldiers’ ration packs today (Norman, 2006, p.8). While having a high salt content, both Vegemite and Marmite have desirable nutritional properties, being particularly rich in B vitamins, and researchers have confirmed that regular consumption of Vegemite or Marmite can have a positive effect on those who suffer from excessive anxiety and stress (Mikkelsen, Hallam, Stojanovska, & Apostolopoulos, 2018, pp.474-475).

For many reasons, scientists and other scholars have been so fascinated by Marmite and Vegemite that they have included mention of these spreads in works ranging from those of a philosophical nature to hard science. Certainly, tasting either spread for the first time is a conscious experience; it is felt through the senses and

can be something so intense as to exclude external factors. This is perhaps why Marmite and Vegemite have appeared in scholarly discourses on phenomenology, transformative experience, and decision theory. Presumably referring to the British original, Michael Tye writes that

[i]f you don't know what it is like to experience Marmite, you do not know the phenomenal character of the experience of Marmite. And if you do know the phenomenal character of that experience, you know what it is like to taste Marmite. (2009, p.9)

In discussing transformative experience and decision theory, Richard Pettigrew asks, "I have never eaten Vegemite – should I try it?" immediately before another equally important (indeed, life-changing) consideration: "I currently have no children – should I apply to adopt a child?" (2015, p.766). David Lewis comments that

I cannot present to myself in thought a range of alternative possibilities about what it might be like to taste Vegemite. That is because I cannot imagine either what it is like to taste Vegemite, or any alternative way that it might be like but in fact isn't. (1999, p.281)

The above considerations all suggest that eating Marmite or Vegemite is an experience which is unique and can be quite phenomenal, in both senses of the word, and therefore these spreads more easily find a place in such literature than, say, honey or jam would. Writing in an entirely different field, Phil Smith, Grahame Collier, and Hazel Storey proclaim that Vegemite could serve as inspiration for an Australian network of sustainability educators, because, as the "iconic Australian spread used on toast and in cooking, [it] gives a flavour of the challenges and opportunities faced in establishing a national professional development initiative" (2011, p.176). They also trumpeted the spread's nationwide ubiquity, uniqueness, and its "diversity" as properties to be applied in the design, delivery, and evaluation of sustainability education (*ibid.*, pp.178-179).

Moving beyond theoretical ruminations, which admittedly look pretty fragile, scientific writings have given Marmite and Vegemite unexpected technological applications. In addition to confirming that both spreads can conduct electricity, Charles Hamilton, Gursel Alici, and Marc in het Panhuis found that Vegemite and Marmite can be used "to produce 3D structures, such as attractive food designs and edible circuitry, onto bread substrates" (2018, pp.87-88). Vegemite and Marmite have also been successfully used as a key ingredient promoting fermentation in the manufacture of (very cheap) home-brewed beer (Kerr & Schultz, 2017), which, given Marmite's origins as a noble by-product of the beer-making process, allows it to come full circle.

It is true that Marmite and Vegemite are not to everyone's taste. While children in New Zealand and Australia may experience their first doses of them as a salty addition to pureed vegetables in their very first year of life (Richardson, 2003, p.62), those who first try these spreads as adults, such as immigrants and visitors to either country, find it a generally unpalatable experience (Johnston & Longhurst, 2013, p.34; Lupton, 1998, p.26; Rozin & Siegal, 2003, p.63). Unsurprisingly, neither spread has been an enduring hit beyond Antipodean shores. Vegemite did become something of an exotic fad for Americans in the wake of a wave of Australian popular culture imports into the United States in the early 1980s (Men At Work, Crocodile Dundee, and the like), but it never caught on as a permanent fixture in their diet (Contois, 2016, pp.350-354). Mike Morin opined that "the thing about this salty-tasting yeast product is either you love it or hate it," more specifically saying that "if you're from Australia, you love it. If

you're from the U.S., you hate it" (2014). In commenting on the return of the ownership of the Vegemite brand to an Australian company from an American one, Clint Rainey claimed that only the Australians would "ever 'get' Vegemite, a salty spread made from yeast extract that has the consistency of Castrol GTX", also acknowledging that (British) Marmite was "equally vile" (Rainey, 2017). Another American observer described the same British spread as "a foul-smelling, evil-looking yeast extract, which the manufacturer's own research shows that if an infant does not eat it by age three, the adult is unlikely to ever consume it" (Marling, 2006, p.91). Given the smaller international reach of New Zealand Marmite – which primarily appears to be sold abroad to communities of expatriate New Zealanders, most notably those living in Australia – there seems to be very little (if any) specific mention of that spread in places such as North America. However, it is nigh impossible that such judgements as the above would be any different if they concerned New Zealand Marmite. To the uninitiated, all of these spreads are equally vile.

Unsurprisingly, Marmite and Vegemite are quite incompatible with local tastes in Central Europe. Living in Slovakia, the present author has repeatedly offered New Zealand and British Marmite as well as Vegemite to his students and colleagues at several higher education institutions to polite but universally negative reactions. The same outcome with British Marmite has also been recorded by Jan Suk in his work with Czech students and members of the public who were invited to taste that "(in)famous English speciality" (2017, p.60) as a part of an art installation focusing on monstrosity. Offered as food to unsuspecting guests, Suk reports that Marmite contributed to a sensuous experience of being in a "monstrous den" with "people with screwed-up faces rapidly leaving" (*ibid.*, p.61).

## 2.2 New Zealand's black gold

New Zealand is an advanced and multicultural country, with the majority of the population identifying themselves as European New Zealanders (also known as 'pakeha'), which is commonly understood to mean being of British/Irish settler descent. A sense of ethnic homogeneity – which is based upon a shared history stretching back to the country's colonization by settlers of predominantly British origin in the mid-nineteenth century – and enduring cultural links to Great Britain are particular defining markers of the European New Zealand identity. Indeed, it is not inaccurate to say that European New Zealand folk culture is still "significantly British – different, but still British" (Kuiper, 2007, p.180). While national myths as salient reinforcers of the European New Zealand identity commonly have their origins in Great Britain, they have been adapted to local conditions over time, arguably becoming improvements on the original. Good examples of this process can be found in nationally significant foods such as New Zealand Marmite.

Tangible signifiers of European New Zealand identity are commonly referred to as 'kiwiana', which, in addition to clothing, children's toys, and various knick-knacks, includes beverages and foodstuffs such as meat pies, fish & chips, roast lamb and potatoes, hokey-pokey ice cream (vanilla-flavoured with hard honeycomb toffee chunks), Anzac biscuits (a hard biscuit made of rolled oats and golden syrup), pavlova (a meringue dessert), Weetbix (a whole-grain high-fibre breakfast cereal), Marmite, Lemon & Paeroa soft drink, Watties tomato sauce, and New Zealand beer. Matthew Bannister points out that, like European New Zealand identity itself, "all these signifiers come from somewhere else" and that they "are mass manufactured, commercial products. Kiwiana is basically 'trash' – fast food, cheap clothing, plastic souvenirs, symbolic of a New World, naïve but vigorous working class, rather than the Old World bourgeois coloniser culture" (2012, p.35). Regardless of their lack of aesthetic

(and some would say culinary) value, the food of kiwiana, of which Marmite is an integral part, is an entirely appropriate expression of European New Zealand identity as being undifferentiated and somewhat anti-intellectual (Ryan, 2002, p.958). Furthermore, its popular and sometimes passionate embrace by 'Kiwis' helps serve as proof that European New Zealanders do actually have a culture of their own (Phillips, 2015; J. Wilson, 2016).

Both Marmite and Vegemite are sold in Australia and New Zealand. However, native-born Australians have an overwhelming preference for Vegemite, which is clearly their favourite and "national" spread. As Paul Rozin and Michael Siegal state, "Vegemite may be the best predictor of national identity of any food in the world. That is, if you eat Vegemite, you are almost certainly Australian" (2003, p.63). Deborah Lupton states that Vegemite "has become a symbol of Australian citizenship. Stories are told of how expatriate Australians insist that regular 'care packages' of Vegemite be sent to them so that they are not deprived of their favourite spread" (Lupton, 1998, p.26). One such 'care package' was even delivered to terror suspect, Guantanamo Bay detainee, and Australian David Hicks in his darkest hours; indeed, it appears that Vegemite really is the elementary national spread for Australians, wherever they may be (Skrbis, 2007, p.184). Given its elevated cultural status, and despite the similarity of New Zealand Marmite, there really is nothing that could legitimately replace Vegemite in the Australian market (Bergkvist & Bech-Larsen, 2010, p.509). Acknowledging Vegemite's importance to Australians, and perhaps going a step few competitors would dare take, the Cadbury confectionary company released a limited-edition Vegemite-flavoured version of its popular Dairy Milk chocolate blocks in May 2015 to give that product "an Australian twist" (Mitchell, 2015). Selling out within three weeks, this innovation pushed the boundaries of Vegemite experimentation a little further (Hickman, 2017).

Challenging Rozin and Siegal's claim that Vegemite is nowhere near as popular in New Zealand as it is in Australia (2003, p.63), anecdotal and observational evidence suggests that many New Zealanders eat Vegemite in preference to Marmite or alternate between both spreads, being 'bi-mites'; the present author is a bi-mite himself. A visit to any New Zealand supermarket or pantry would prove to any sceptic that Vegemite is a popular spread there as well. Indeed, loyalties in New Zealand between Marmite and Vegemite appear to be quite evenly split, with Marmite probably edging out Vegemite overall ("Marmite or Vegemite?" 2017). For New Zealanders, preference for one spread or the other is simply a matter of taste – Marmite is a little less salty and somewhat sweeter than Vegemite – rather than a matter of the spread's national origin. Simply put, Vegemite is as central to the New Zealand diet as Marmite is. Alongside other important national foods – such as Anzac biscuits and pavlova (both of which have been the subject of long-running disputes between Australians and New Zealanders over their provenance) – Vegemite serves as clear evidence of a broader common culture shared with Australia in terms of food as well as media, popular culture, sport, and the movement of people. Australia is not really seen as a 'foreign' country by New Zealanders, and so Vegemite is not considered to be a foreign product.

### **3 Marmageddon**

In late 2010 and 2011, a series of earthquakes hit Christchurch, a city in the South Island of some 350,000 people and the sole location of manufacture for New Zealand Marmite. The most damaging of these was a magnitude 6.3 earthquake of shallow depth on 22 February 2011 which caused 185 deaths and damage to buildings and infrastructure to an extent unseen in that city's history. Sanitarium's Marmite-making

factory was damaged in the earthquake and was eventually forced to close down, halting all production in November 2011. This was not the first disruption to the supply of Marmite – there had been a shortage following a fire at the factory in 1966 – but this was certainly the longest (“Dig Deep”).

An impending Marmite shortage was announced by Sanitarium in March 2012 as it became clear that existing supplies in retail outlets would run out before the resumption of production. As supermarket shelves emptied nationwide, Sanitarium issued its first rationing advice, which included eating Marmite on toasted bread (as it spreads more thinly) and having Marmiteless days (Manhire, 2012). The company also launched the “Don’t Freak” advertising campaign in print, television, and online media, reminding Marmite loyalists of the importance of the spread to their everyday rituals (lest they switch to Vegemite) and presenting the spread as a true expression of New Zealandness (Macleod, 2012). The national importance of the shortage was understated by the involvement in the campaign of Sir Graham Henry, a former coach of the All Blacks rugby team and a hugely respected figure, who gave something like a televised presidential address to the nation (ibid.). Despite the lack of a product to sell, Sanitarium’s campaign ensured brand awareness remained very high as people were constantly reminded of the shortage and of Marmite’s importance. In order to continue protecting its ownership of the Marmite trademark in New Zealand, Sanitarium used legal channels to prevent one importer from selling British Marmite in New Zealand under the same name (Plunkett, 2012). This was despite the differences between British and New Zealand Marmite being very noticeable and the fact that the British spread would pose no real threat to the Marmite market in New Zealand. British Marmite is sold in New Zealand and Australia as *Our Mate* and is really only consumed by British immigrants.

Initially expected to last a few months, the Marmite shortage, promptly dubbed ‘Marmageddon’, ended up lasting over one year. One reason the shortage lasted so long was the realization that Marmite could not be made anywhere else other than in Christchurch, because the desired taste was due to the specific nature of the locally-sourced ingredients. Desperate for a makeshift solution, Sanitarium had tried to make Marmite to New Zealand specifications through an alternative supplier based in South Africa, but the taste and smell of that experiment was deemed too different to be palatable for the New Zealand market (Robinson, 2013).

Marmageddon affected people to various degrees. While the shortage presented a problem for Marmite loyalists, bi-mites switched to Vegemite, and there were plenty of people who did not like either spread. Aware of the almost evenly divided preferences for Marmite and Vegemite, Prime Minister John Key tried to remain non-partisan when discussing Marmageddon; he acknowledged the depletion of his own Marmite supply and the fact that he would “have to go thin” in his usage, but he also admitted that he was a bi-mite himself and could happily eat Vegemite should his Marmite supply run out (“Outcry in New Zealand”, 2012). One place that never actually ran out of Marmite during Marmageddon was New Zealand’s Scott Base research facility in Antarctica; the scientists there had so much Marmite on hand that they were willing to swap their supplies of the “black gold” for highly desired fresh fruit and vegetables (Wright, 2012).

During Marmageddon, a primary site of Marmite-related activity was on Trade Me, which is New Zealand’s largest Internet-based auction website. During the shortage, ordinary-sized jars of Marmite were offered at highly inflated prices, with some of these jars even being sold in various states of consumption. There was sometimes a mercenary aspect to this activity, which one mother seeking Marmite for her autistic child – who required it daily – likened to “farmers that take advantage of a drought and sell on bales of hay at exorbitant prices” (Jones, 2012). However, people in true need of Marmite, such as this mother, were helped by the

public once media attention was brought to their plight. Like the present paper, many online auctions proved to be attempts at humour: there were offers of Marmite which was already spread on toast; Marmite spread on cereal biscuits; and even Marmite artwork, including a print of a woman who was covered in this (now precious) spread and, well, nothing else (“Bucket of Marmite”, 2012). One notable and humorous sale of Marmite through Trade Me was that of a fire-damaged and half-empty jar which had survived an arson attack on a student flat in the town of Palmerston North, and which netted two hundred dollars for its (now homeless) sellers (Galuszka, 2012). There were also many auctions of Marmite jars and pails, and Marmite-related artwork, to raise money for charities; this displayed the generous nature of the New Zealand public in the spirit of pulling together for a good cause (Crayton-Brown, 2012; Parsons, 2012). Perhaps the most notable of these was a 500-gram jar of Marmite, worth a little over seven dollars before the shortage, which raised over one thousand dollars in an online auction for a hospice in the town of Nelson (“Marmite Strikes Gold”, 2013). While people were deprived of their beloved Marmite for some time, the above is all proof that Marmageddon also caused good things to happen.

#### 4 Conclusion

Marmite returned to supermarket shelves on 20 March 2013 to great demand, although some consumers could swear that it somehow tasted “different” in spite of Sanitarium’s assurances it was one and the same product (King, 2013). Perhaps Marmite loyalists’ taste buds had changed in its absence from their diet, and they were a little overwhelmed by being re-acquainted with their old favourite. In any event, given Marmite’s successful return and the resumption of its position as a core component of the New Zealand diet, and marginal favourite in the yeast-spread market, it appears that everything just went back to normal. The “Don’t Freak” marketing campaign and regular media attention on the crisis had helped maintain brand and public awareness by playing on concepts of togetherness and New Zealandness. However, Marmageddon also proved that New Zealanders can actually survive without Marmite. There is, after all, always Vegemite. Unlike Australia, New Zealand is not a ‘one-spread’ country; perhaps in a Vegemite shortage Australians would experience a greater sense of nutritional and national privation than New Zealanders did during Marmageddon.

Most importantly, Marmageddon brought out some positive features within the New Zealand population, such as generosity, inventiveness, and good humour, which all form a part of how New Zealanders like to see themselves. Marmageddon and its conclusion also showed that Marmite still matters in New Zealand. It is a celebration of kiwiana, which involves taking things of foreign origin – such as fish & chips and meat pies from Britain, but also kiwifruit from China – and improving them, making them ‘kiwi’, and giving many New Zealanders a basis for a culture they can call their own.

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