

# **Bilingual Schooling as Educational Development: From Experimentation to Implementation**

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## **1. Introduction**

Bilingual schooling in developing countries is in the process of growing out of its historical roots in scattered missionary efforts, separate-but-unequal mother tongue schooling, and/or ragtag experimentation into better informed and more systematic programs. Positive results and changes in political climate have encouraged both government education ministries and donor agencies to reconsider the importance of instructional language, particularly in primary and basic education programs. This means a new focus on the use of mother tongues, or *lingua francae* such as creoles or widely spoken indigenous languages, to teach basic literacy and content in a more understandable way.

In contrast to submersion in a foreign (ex-colonial) language, which puts at a disadvantage all students who do not have prior access to this language, and further handicaps special groups like ethnolinguistic minorities, rural dwellers and girls and women, bilingual programs are much more accessible and inclusionary. Pedagogically, use of the mother tongue or a strong *lingua franca* provides the basis for comprehensible content area instruction and literacy skills upon which competence in the second or foreign language can be built. Sociopolitically, use of previously marginalized languages means providing people not only with access to information but also with a stronger sense of identity and self-worth. The same languages and cultures that colonialism made sources of shame become a means for empowerment, with the potential to promote democratic participation and pluralism.

The purpose of this paper is to describe the challenges and suggest some lessons learned about implementing bilingual programs in the context of educational development, focusing on two countries where the author has worked as a researcher and technical consultant. Both Mozambique and Bolivia are working to implement bilingual programs in an effort to create higher-quality educational systems for all. Mozambique is currently negotiating a critical stage between experimentation and implementation of bilingual schooling, while Bolivia has been involved in a long process of implementation since passing a monumental educational reform law in 1994 that pledges bilingual intercultural education for all. Both countries, along with others whose cases will be discussed briefly in this paper, have experienced a range of successes and failures in the process, from which lessons can be learned.

## **2. The need**

Schooling in developing contexts is plagued by serious inequalities between urban and rural areas, between elite and subordinate social groups, and between boys and girls. Many of these inequalities correspond to ethnolinguistic heritage and conditions of language access, where there are clear boundaries between the dominant group and the dominated. The elite speak the prestige code, which is usually the language of the former colonizing power and the “official” language of governance and schooling; meanwhile, the others speak languages that often lack formal recognition, and their access to the prestige language is limited, even if they themselves make up a numerical majority of the population. The linguistic mismatch of schools and the communities they are supposed to serve are evident in the following linguistic and educational profiles of our case countries.

*Mozambique* is a southern African country of 15.5 million (World Bank, 2001) in which about three-quarters of the population are monolingual in one of 24 indigenous languages, and about one-quarter speak Portuguese as a first, second or foreign language (Katupha, 1985).<sup>1</sup> Portuguese is the official language of primary schooling, in which only about 50 percent of the school-aged population is enrolled (UNICEF, 1999).

*Bolivia* is a South American country of about eight million, of which an estimated 70 percent belong to one of 33 indigenous groups (Albó, 1995; Muñoz, 1997). The largest of these groups speak Quechua (2.5 million) and Aymara (1.6 million) (MDH, 1995). About one-third of the population are monolingual Spanish speakers, and another 20 percent speak Spanish as a second language (Albó, 1995). Until the educational reform law, Spanish has been the only official language of primary schooling, whose enrollment is estimated at 60 percent in rural indigenous Andean regions (ETARE, 1993).

Schooling in both of these countries has traditionally been done through “submersion,” a term coined by Skutnabb-Kangas (see 1981), where the L2 (Portuguese or Spanish, respectively) is the language of instruction but is not explicitly taught, and teachers rarely have any strategies at their disposal other than to “talk at” students and elicit rote responses. This classroom practice has been widely documented in post-colonial schooling; for example, Hornberger and Chick (2001) provide an illustrative comparative view between South African and Peruvian classrooms, where interaction is limited to “safetalk” such as “Do you understand?”/ “Yeeesss” exchanges that give the appearance of understanding where there is none. Classroom use of the mother tongue, which has long been prohibited and has become a source of shame, has been an illicit means for teachers to aid understanding, but often without systematic consideration for teaching the L2. In submersion programs, parents feel powerless to support their children’s schooling because they do not speak the language of the school; this feeling of powerlessness often results in reticence to speak, which tends to be misinterpreted as lack of interest by teachers and school officials. All in all, schooling does not work for most people, and only a small fraction get more than a few years of basic education. As Williams and Cooke have recently explained, “It is abundantly clear that education in a language that few learners, and not all teachers, have mastered detracts from quality and compounds the other problems of economically impoverished contexts” (2002: 317).

### 3. The proposal

In the context of the agreed United Nations goal of Education for All, the task now facing developing countries is to develop non-exclusive schooling systems that serve entire school-aged populations with relevant basic education. With this aim in mind, there has been some re-thinking of the issue of instructional language. There are some historical precedents for use of the L1; for example, some former British colonies have long experience with mother tongue schooling for indigenous peoples, the most inequitable example of which was Bantu education in South Africa and Namibia under apartheid (see Heugh, 2003 for a description). Another example can be made of missionaries in Latin America, who brought mother tongue instruction to mission churches and schools (Albó, 1995; Hyltenstam & Quick, 1996), which was also done in some parts of Africa. Some initiatives have come from within, such as Nyerere’s historic promotion of Tanzanian public schooling in Kiswahili, the lingua franca, bringing basic education to more citizens (Rubagumya, 1990). Other initiatives have come from the outside, as donor agencies with experience in educational development have begun to promote mother tongue instruction as a means for improving educational quality and equity (see e.g. Sida, 2001). It is in this context that both Mozambique and Bolivia have engaged in experimentation and further implementation of bilingual programs, as described next.

*Mozambique:* A bilingual experiment known as PEBIMO, which ran from 1993 to 1997 with U.N. and World Bank sponsorship and was monitored by the research branch of the Ministry of

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<sup>1</sup> When published, data from the 1998 census are expected to demonstrate growth of overall Portuguese use; however, statistics are based on the adult population and do not reflect the language skills of school-aged children (Benson, 2000).

Education, worked in two different regions with the corresponding Bantu languages (Xichangana and Cinyanja) along with Portuguese over primary grades 1 through 5 (Benson, 2000, 2001). As part of a wide-scale curriculum reform, bilingual programs in up to 16 languages have been readied for implementation on a voluntary basis and slated to begin each year since 2000. Beginning in 2003, an NGO has undertaken the piloting of two new languages in one province of the country, in connection with its efforts to use the same languages in a bilingual adult literacy program, but as yet the Ministry has failed to make a commitment to bilingual school implementation (Samima Patel, personal communication, March 2003).

*Bolivia:* After scattered efforts in piloting bilingual schooling, a large-scale experiment known as PEBI (which had strong international funding, technical support from the German organization GTZ, and counterpart projects in Peru and Ecuador) operated from 1990 to 1994 in 140 schools using three indigenous languages (Quechua, Aymara and Guaraní) along with Spanish (UNICEF, 1998). Findings from the experiment fed into the Educational Reform Law of 1994, which calls for the introduction of all indigenous languages into primary bilingual schooling and includes interculturalism in the curriculum to increase understanding and tolerance between ethnolinguistic groups (Hornberger, 2002). This highly innovative reform policy has been undergoing gradual countrywide implementation and has survived political changes, but faces many challenges (see King & Benson, in press) and practically speaking has yet to reach many of the most needy regions.

Bilingual schooling has great potential to improve the quality of basic education in developing countries. Researchers worldwide (see reviews in Baker, 2001; Cummins, 1999, 2000; Dutcher, 1995, 2001) have demonstrated that bilingual teaching offers clear pedagogical advantages over traditional programs. As mentioned above, content area instruction in the L1 can be understood so that learning does not have to be postponed until children learn the L2. Further, initial literacy in the L1 means that children can make the connection between spoken and written communication, developing skills upon which they can build once they learn the L2, which is taught explicitly. Teachers and students can interact more naturally in the L1 and negotiate meanings together, which greatly facilitates participatory teaching and learning and has positive consequences for the affective domain (Baker, 2001). In addition, bringing the culture and language of the home into the school is important for identity and personal as well as group empowerment (Cummins, 2000). These and related benefits of mother tongue instruction have been documented in the cases of both Bolivia (D'Emilio, 2001; King & Benson, in press; Muñoz, 1997; Salinas, Paca & Albó, 2001) and Mozambique (Benson, 2000, 2001, 2002a; Benson & Patel, 1998).

#### **4. The challenges**

As we have seen, the pedagogical reasoning behind such programs is clear: in contrast to use of an exogenous language to which few children beginning primary school have been exposed, use of a familiar language provides new opportunities for children to understand, participate, and be empowered by their schooling. Unfortunately, the decisions made do not always reflect everything scholars know about what works in the classroom, as the complex relationship between language, education and society influences decision-making at many levels. This section explores a range of macro- and micro-level challenges to implementation of bilingual programs.

One of the most imposing challenges is the often frustrating lack of decision-making action that can stall implementation even when many practical obstacles have been overcome through experimentation. For example, Obanya sees many post-colonial governments as having taken an “evolutionary” approach to school reform, where changes are made only when needed and follow the rest of the world (read: former colonial powers), for example when France abolished the first baccalaureat exams and most of “francophone” Africa did the same (Obanya, 2002: 21). Many have also taken an “ad hoc” approach, addressing one issue at a time without looking at the larger picture or at related factors or actors who should be involved, resulting in a “culture of pilot projects,” including not surprisingly “piloting on the use of African languages in Education which have lasted indefinitely (e.g. Senegal, Cote d’Ivoire, Cameroun)” (Obanya, 2002: 20). My colleagues and I were party to this approach in Guinea-Bissau in the early 1990s when we followed an innovative and highly successful

experiment involving an indigenized, ruralized curriculum and using Kiriol, the lingua franca, for beginning literacy and instruction to facilitate acquisition of Portuguese, the official language. Despite our best efforts to document the successes of the project (Augel, 1995; Benson, 1994; Dialló, 1996; Hovens, 1994, 2002) it was discontinued when funding ended in 1994 and no decisions were made to implement, though piloting was later permitted in one community (personal communication with Mart Hovens, April 1995). A few years later Hovens went on to work in Niger, where his task was to revitalize a mother tongue schooling program which had been considered experimental for over 20 years (Hovens, 2003).

Seen in this context, Bolivia would seem to be a success case, because after many years of experimentation, bilingual education became official in the Educational Reform Law of 1994. This highly innovative policy guarantees mother tongue schooling for people who are speakers of Quechua, Aymara, Guaraní, and all other indigenous languages, includes indigenous language study for monolingual Spanish speakers, and incorporates an intercultural component designed to promote mutual understanding between groups (Hornberger, 2002). Unfortunately, this case may demonstrate that even when policy is made, implementation is not guaranteed. For example, the top-down nature of this reform has met with some resistance from communities and even teachers, and a combination of logistical constraints and decision-making difficulties have meant that mother tongue schooling is not yet reaching those who are most marginalized, and that the intercultural and indigenous language study components have not yet been operationalized after nearly 10 years (for a description of the limitations and the potential of this reform, see King & Benson, in press).

Mozambique is a case to watch, since it appears to be following a jagged path leading from experimentation to implementation. A number of us have worked to document the successes of the experiment and disseminate the results through meetings of representatives of the Ministry of Education, the national university, linguists, linguistic and cultural groups, NGOs, and communities. We recommended that implementation be gradual and voluntary by community, beginning with the two languages already developed within two years of the end of the experiment so that the momentum of public support would not be lost; meanwhile, other languages (including materials and teacher training) could be readied for use as time and interest allowed (Benson, 2001). As mentioned above, linguist-educators have set about building upon what has already been started in bilingual adult literacy (Veloso, 1997), developing pedagogical vocabularies and materials in as many as 16 languages, but implementation has seemed to rest on the making of some official decision, which keeps getting postponed. Now an influential NGO working with two languages in adult literacy has taken on the task of piloting these languages in primary schools in the same province, and although an NGO clearly does not have the power to make official policy or bring about implementation, it may provide the impetus for some official steps to be taken.

Failure to make bilingual education a part of official policy is often blamed on the economic factor. While lack of resources undoubtedly characterizes education in all developing countries (and is a common complaint in developed ones as well), it is not in my view a deciding factor, because there is a great deal of donor assistance in the education sector, and any improvement to an education system requires investment. (One could also question the cost to society of high repetition and dropout rates caused by failure to adopt improved schooling methods; see e.g. Chiswick, Patrinos & Tamayo, 1996.) In fact, more serious obstacles are created by long-standing attitudes toward language. For example, everyone from elite decision makers to peasant farmers tend to believe unconditionally in the power of exogenous “official” languages, as characterized by comments like, “If you want a good job you must speak X” [insert French, English, Spanish or even Portuguese]. D’Emilio (1995) has discussed the tension between cultural identity and modernity apparent in the design of schooling for indigenous populations in Latin America, the usual manifestation of which is a firm belief in the importance of the ex-colonial language and comments like, “Children already learn the mother tongue at home, so why should they learn it in school?” Despite this near-religious belief in the economic power of European languages, they are in reality relatively useless for most people. As Bruthiaux (2002) explains, the informal economy of most low-income countries involves 50 percent or more of the population, and this sector is growing rather than shrinking. Participation in the informal economy may require skills in lingua francae but not in European languages. This means that hegemonic languages such as English serve only to perpetuate inequality in these countries, and that policymakers should be asking

themselves whether or not precious school resources should be spent to teach or use European languages at all.

The issue here is the maintenance of power in the hands of a few. As Williams and Cooke point out, the “standard” European variety has since colonial times been the language to which the dominant group has had access, which is why decolonization failed to bring about any significant language policy changes (Williams & Cooke, 2002: 300). The same authors explain that there are contradictions inherent in education for development, especially regarding its definition. Is development seen as increased prosperity, which involves the strengthening of official structures in low-income countries so that services will eventually reach those who need them, or is it seen as the meeting of human needs, which involves more equitable resource distribution and implies more democratic participation, higher levels of education and health, improvement in the status of women, and so on? While most development agencies have stated goals that would correspond to the latter definition, their actions tend to cater for the former. Hornberger would agree; she feels that to “transform a standardizing education into a diversifying one” represents an ideological paradox that challenges implementation of more culturally and linguistically relevant programs (2002: 30). This paradox is reflected in the slow and inconsistent progress of educational transitions in low-income countries such as Namibia, about which Callewaert (1998) has written under the expressive title, “Which way Namibia—to decolonize the colonized mind of the anticolonial teacher?”

Underlying the discourse are a number of myths about language. One that has long influenced policy makers is the idea that one nation should have one unifying language, a colonial concept that masked the colonizers’ own linguistic diversity (for example, Welsh, Irish and Scottish Gaelic in the “English-speaking” U.K., Euskara, Gallego and Catalán in Spain, etc. as described in Salminen, 1999). Another colonial concept is the supposed inherent worth of European languages and the complementary lack of status of indigenous languages, which are still often disparagingly called “dialects” or “vernaculars,” stigmatizing both the languages and their speakers as being somehow insufficient or incomplete. Other myths that persist contrary to research findings are that a new language is learned/used to the detriment of the first, or that bi- or multilingualism causes cognitive confusion. Many people have the idea that the first language must be ignored or pushed aside so that the second language can be learned; this is the myth behind most present-day instruction in languages that learners do not speak, yet it has been effectively disproved by Cummins (see 1999 for a concise summary of his theories and arguments) among others. In fact, longitudinal research such as that of Thomas and Collier (1997, 2002) demonstrates the opposite: that long-term L1 development results in the most successful L2 learning and overall school performance.

There are also a few common misperceptions on the part of parents and teachers. This is understandable since their own experience with formal schooling has usually been in L2 submersion-type systems, where students have to “sink or swim” through repetition and memorization (Skutnabb-Kangas, 1981). If this is the only system they know, they may believe that only the ex-colonial language is worthy of classroom use. The idea of becoming biliterate (per Hornberger, 2002) is also an anomaly in countries where the home language has long been portrayed as inferior and incapable of expressing complex academic thought. While it is true that many indigenous languages have come into written form relatively recently, this should be seen as a political/historical choice rather than as some problem inherent in the languages themselves. Léopold Senghor, a literary scholar and the first president of Senegal, once translated Einstein’s Theory of Relativity into Wolof to show that it could be done. Unfortunately, few such influential leaders have recognized that the colonizers were responsible for marginalizing languages and cultures along with their speakers. As a result, what characterizes the traditional education of many ex-colonial peoples is the lack of opportunity to become proficient in the L1 in written form and the L2 in spoken form.

This includes bilingual teachers, who may be ambivalent themselves regarding the place of the L1 in formal schooling. Such ambivalence can lead to difficulties in implementing appropriate bilingual models. As I have discussed previously (Benson, 2002b), there is a marked tendency for developing countries to circumvent established models and attempt “short cuts” by transitioning to the higher-status ex-colonial language after one or two years. This tendency is bolstered by language myths and a wish to “save time” in societies where use of the official language is prioritized in school and where the belief that the L2 is necessary for students’ future opportunities goes unquestioned (Stroud, 2002).

For example, Hovens (2002, 2003) discovered that a combination of lack of technical supervision, competition with higher-status Arabic- and French-medium primary schools, and parental pressure was responsible for effectively shortening the period of mother tongue use in some experimental schools to about two years. The problem with “short cut” models is that they do not work optimally, which can lead to the accusation that mother tongue instruction wastes time, or that the transition to the L2 “isn’t working” (see Benson, 2000, 2002). Parents and policy makers may worry that children’s L2 skills are not advanced enough, while it is in reality mother tongue development that is lacking (as established by Cummins, 1999; Thomas & Collier, 2002).

Schools in both Mozambique and Bolivia have attempted to transition students to the L2 after relatively short periods, but for different reasons. In Mozambique, the experiment suffered from lack of adequate technical input from the outset, as well as from interruptions in the school year when L2 instruction was to begin (Benson, 2001). Bolivia has opted for an ideal “maintenance and development” model that continues L1 instruction throughout primary schooling, but the limits of teacher supply, teacher training and materials development have restricted bilingual programs to grade 1 to grades 3 or 4 (King & Benson, in press). Even with these constraints, however, these programs and others like them (such as those of Malawi and Zambia in Williams, 1998) look extremely effective compared to L2 submersion. For example, our study in Guinea-Bissau found that submersion students’ average Portuguese competence remained below “survival” level even after four or more years of schooling through that language (Benson, 1994), which raises the question of whether or not any learning is taking place.

## 5. Lessons learned

There are a few basic lessons to be learned from the experiences of developing countries in bilingual schooling thus far. These relate to empowerment of both children and parents, and focus on traditionally marginalized peoples who have everything to gain by access to bilingual programs.

One finding with positive implications for educational policy is a possible connection between bilingual education and girls’ school participation, which has traditionally been less active than that of boys in many developing countries. International research indicates that many girls never get to school, or attend only between one and three years, due to various factors including family choices given limited resources, public perception of girls as less able, and lack of trust in male teachers (see Chowdhury, 1993). Yet our research in Guinea-Bissau, Niger and Mozambique found that girls in bilingual programs stayed in school longer, were more likely to be singled out as good students, did better on achievement tests, and repeated less often than girls in submersion classes (Benson, 1994, 2001, 2002a; Hovens, 2002, 2003). While there are undoubtedly many factors involved, the possible connection between mother tongue use and improved girls’ participation should be further explored and may help demonstrate to policymakers how inclusionary bilingual schooling can be.

Bruthiaux argues convincingly that the most important type of education needed by the poor is basic literacy and numeracy in a language they understand, and that the learning of these skills (whether as children or adults) “socializes participants into new and potentially life-transforming roles” (Bruthiaux, 2002: 285). It does this by providing access to information and “alerting participants to a range of interrelated economic, social and intellectual issues related to poverty...[including] the practical causes of vulnerability” (Bruthiaux, 2002: 286), thus transforming their perception of their own potential. Many of the effects of bilingual programs mentioned above could be seen as solid steps taken by traditionally marginalized people (children and parents) in this process:

- ◆ Becoming literate in a familiar language
- ◆ Gaining access to communication and literacy skills in the L2
- ◆ Having a language and culture that are valued by formal institutions like the school
- ◆ Feeling good about the school and the teacher
- ◆ Being able and even encouraged to demonstrate what one knows
- ◆ Participating in one’s own learning

- ◆ Having the courage to ask questions in class (students) or ask the teacher what is being done (parents)
- ◆ Attending school and having an improved chance of succeeding
- ◆ Not being taken advantage of (Bruthiaux, 2002: 286).

Many of these points have been confirmed in our work. For example, Mozambican parent support for bilingual education was virtually unanimous when interviewed during their children's fourth year of participation in the experiment, and when we asked why, 70 percent of them said it was because their children could read, write and count in both languages, and 50 percent said that bilingual education raised the value of the local language and culture (Benson, 2000). The Bolivian parents interviewed by D'Emilio and others talked about having less fear in dealing with the teacher and the school, and about how the mother tongue eased learning (D'Emilio, 2001). Similarly, Hovens' parent interviews revealed the following reasons for support:

- ◆ The home and school environments are brought closer together.
- ◆ Children can express themselves in class.
- ◆ Children can appreciate the home culture.
- ◆ Children pay more attention to lessons.
- ◆ Lessons can be understood more easily.
- ◆ Children learn faster in the mother tongue.
- ◆ A more balanced personality is developed (Hovens, 2003, my translation).

Power relationships are not easily changed, but parent involvement is undoubtedly a key factor. Cummins has pointed out that the agenda for educational reforms in the United States as late as the 1990s was "largely determined by the concerns of dominant group educators," while "the voices of culturally diverse educators and parents were rarely heard" (1996: 171). In developing countries where power relations are even more asymmetrical, the situation can be acute. Referring to the inferiority of educational provision for indigenous peoples throughout Latin America, D'Emilio says that fundamental changes in education policies require greater community participation: "This means more than taking parents' opinions into account—it means respecting and accepting their decisions" (D'Emilio, 1995: 79).

Because parent and other local support are so important, bilingual schooling appears to work well in communities that have functioning L1 literacy programs, and vice-versa. Shared adult and child literacy in the L1 means shared values, skills, and abilities, higher valorization of the L1, and even mutual writing of materials which can be used to promote literacy skills across the generations. In both Mozambique and in Bolivia, bilingual schools have been most popular in communities where there are also bilingual adult literacy programs. In Bolivia, the potential for cross-generational interaction with print is already being realized in communities of Chuquisaca and Potosí, two provinces with traditionally low levels of literacy (Salinas, Paca & Albó, 2001).

Taken together, these findings from around the world suggest that people of developing countries benefit significantly from the use of their languages in schooling. That bilingual programs reach the most marginalized is a point not to be missed by policymakers on any continent.

## 6. Conclusions

While experimentation is still the norm and implementation continues to present challenges, there is a great deal of evidence that bilingual schooling offers developing countries a way to improve delivery of quality basic education to linguistically diverse populations. The pedagogical benefits—comprehensible content area instruction and mother tongue language and literacy competence upon which to build L2 skills—have been demonstrated repeatedly even in economically limited contexts. Likewise, there is evidence of other benefits such as increased pride in the home language and culture, higher self-esteem, improved girls' participation, greater classroom interaction, and many other desirable schooling outcomes. These outcomes have been documented in many cases, but have yet to

convince everyone, to which all of us who follow countries in their negotiation of the irregular path between experimentation and implementation can attest. In countries that still run bilingual experiments, the task is to put into practice what has been learned worldwide regarding effective models and methods, so that more support may be gained through achievement of promised outcomes. In countries like Mozambique, the question seems to be whether or not a growing body of scholars and practitioners can inform the public and influence policy so that more widespread implementation can begin. In countries like Bolivia, the challenge may actually be to mobilize resources at the grassroots level so that the policy dream can become a practical reality. What this means to children in developing countries is the chance to receive quality basic education and to become participating members of society, things they have been denied for much too long.

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