

**ASSESSING THE IMPLEMENTATION OF THE LANGUAGE POLICY OF  
USING CHINYANJA AS THE MEDIUM OF INSTRUCTION IN LOWER  
PRIMARY SCHOOLS IN CHILANGA DISTRICT EDUCATION BOARD,  
ZAMBIA.**

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## Abstract

In 2014, the Ministry of Education introduced a revised education curriculum, which saw the use of local languages as mediums of instruction as well as languages for teaching initial literacy from Pre-School to Grade 4. The Permanent Secretary said that the purposes of the review included among other things re-defining the language policy in order to enhance the teaching and learning process. He further stated that English language was going to be introduced as a subject at Grade 2 but continue to be used as a language of instruction from Grade 5 to tertiary level. He also announced that the National Literacy Strategy was followed by development of instructional material for teaching initial literacy in all the seven official Zambian languages.

The purpose of the study was to assess the implementation of the language policy of using Chinyanja as the medium of instruction in lower primary schools in Chilanga District, Zambia. The specific objectives of the study were:

- To assess teacher competency in the use of indigenous language i.e. Chinyanja as a medium of instruction in lower primary school in Chilanga District.
- To ascertain the availability of learning and teaching materials written in indigenous language in the schools in Chilanga District where the policy is being implemented.
- To determine the level of acceptance of Chinyanja as a language of instruction in the study site by stake-holders whose mother tongue is different.

The language-in-education policy, which advocates mother tongue-based learning, has the potential to make primary education contextually located and locally accessible, particularly to ethnic minorities and marginalized groups, thereby improving the reach and quality of education.

The research comprised both qualitative and quantitative research methodologies. Primary quantitative data was collected through the use of a structured questionnaire for teachers teaching at pre-school and lower primary school. In addition, one FGD comprising parents and guardians was conducted to get their views on the policy. Official policy documents and reports were used as important secondary data sources. Two key informants were interviewed at the Chilanga DEBS.

The study revealed that policy implementation is hampered by incompetency in the use local language by some teachers, misgivings over the choice of local language by some stake holders and to some extent the non-availability of teaching and learning materials at some schools.

**Statement of Authentication**

I hereby certify that the work presented in this dissertation is mine to the best of my knowledge and belief. I further certify that this thesis is my original work, except where I have cited other's research work.

I hereby declare that I have not submitted this material, either in whole or in part thereof, for a degree at this or any other university. Whatever flaws might be found in this dissertation are exclusively mine.

*Chipeta*

12/09/16

Lucy Chipeta

Date

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## List of Acronyms

<b>DEBS</b>	<b>District Education Board Secretary</b>
<b>DESO</b>	<b>District Education Standards Officer</b>
<b>DRCC</b>	<b>District Resource Centre Coordinator</b>
<b>EFA</b>	<b>Education For All</b>
<b>FGD</b>	<b>Focus Group Discussion</b>
<b>GRZ</b>	<b>Government Republic of Zambia</b>
<b>LiE</b>	<b>Language-in-education</b>
<b>MoE</b>	<b>Ministry of Education</b>
<b>MoESP</b>	<b>Ministry of Education Strategic Plan</b>
<b>PTA</b>	<b>Parents Teachers Association</b>
<b>USAID</b>	<b>United States Agency for International Development</b>
<b>SSI</b>	<b>Semi Structured Interview</b>

## Glossary of terms

- **Bilingual:** (Individual or societal) ability to speak two (or more) languages, or a model of schooling that uses two (or more) languages.
- **Biliterate:** Ability to speak read and write two (or more) languages.
- **Empowerment:** Specific efforts to give learners the knowledge, strategies and self-confidence to act to improve their own situations and those of others.
- **Foreign language:** A language that is not spoken in the immediate environment of the learner.
- **Immersion:** Focused use of a second language for instruction, using second language teaching methods (with L1 support at school and/or at home)
- **L1:** First language, mother tongue.
- **L2:** Non-native language, second language, foreign language; may specifically refer to contexts where the language is widely spoken outside the home, but often used to refer even to situations where there is little contact with the language except through the school or “official” contexts.
- **Lingua franca:** Widely spoken language used for communication between linguistic groups.
- **Maintenance:** Continued development of a language through schooling
- **Medium of instruction:** The language used in teaching and learning curricular content.
- **Mother tongue:** First language (L1), native language
- **Multilingual:** Individual or societal ability to speak more than two languages.
- **Official language:** Language adopted by the state for administrative and institutional use, often including schools
- **Submersion:** Use of an instructional language that is not spoken by the learner nor taught as a language
- **Transfer:** Cummins’ concept that what is learned in the L1 contributes to one’s competence in other languages
- **Transition:** Shift in the medium of instruction from L1 to L2, or shift in the language of literacy

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## CHAPTER 1: INTRODUCTION

‘There is no defeat in traditional education greater than its failure to secure the active cooperation of the pupils in the construction of the purpose involved in his studying’

(Dewey 1958, P. 67)

Education has been found to have a positive impact on human development and attempts to make it available to all has been a priority for development agencies and governments since the UN declared it a human right in 1948. At the World Conference on Education for All (EFA) in Jomtien, Thailand in 1990, the international community committed to ensuring the universal right to education for “every citizen and every society”, with developing countries making constitutional commitments to provide universal primary education for all (World Declaration on Education For All 1990). The initial response to removing barriers to basic education was improving access to schooling, which was taken to mean increasing the numbers of schools and teachers and then getting as many children into schools as possible (Dyer 2002). But while this may have increased enrolment rates and provided positive quantitative data, it failed to consider the qualitative issues inside of schools. Tests carried out in several developing countries revealed that many students had not attained the competency levels required for their level of schooling.

Further, the 2005 EFA Report on the quality of education notes an enormous gap between the number of pupils graduating from school and those among them mastering a minimum level of literacy. Low quality education often has a disproportionate impact on vulnerable groups and leads to large school and resource wastage as learners drop out, are pushed out or end up repeating grades (Alexander 2000; Bowden 2002). Further, low quality education undermines the expected developmental role of education with parents sometimes deciding to reallocate scarce resources to other sectors rather than education. But as Alemayu (2001) notes, “(a lack of education) is the main single factor associated with the probability of being poor, hence improving educational performance should form a core element in the poverty reduction strategy”.

Various studies have shown that meeting a minimum of standards, including improving school facilities, having teachers who are sufficiently trained and have a mastery of content and pedagogy and, the focus of this paper, having appropriate language strategies, can significantly improve

educational quality (EFA 2005). Appropriate language-in education (LiE) policies that enable teachers to instruct in the language a child speaks most at home and understands well enough to learn academic content through, that is their mother tongue, as they learn a different language improves pupils' critical engagement with content, foster an environment of mutual learning and improve inclusion as shall be discussed in this paper.

Language is an essential part of who we are. It is central to our individual identity, our self-concept, and our group identity. Almost 7,000 languages are spoken in the world today (Save the Children 2007). Although most countries have different linguistic groups, the linguistic diversity is rarely reflected in its school system. Different languages carry different statuses – locally, nationally and internationally. In any multilingual society there is often one or two prestigious languages used in education, governance and other official domains (and invariably linked to the elite in the society). Meanwhile other languages remain without the legal authority of an official language and are not used in formal education because they are deemed unsuitable, inferior or lacking modern concepts. Much of the reason for this is linked to government's wish to promote a homogeneous national identity as a way of building a stable country.

Language can be an enormous barrier for children when they do not speak or understand the language used by teachers in their schools. Many will enroll, but will struggle to take advantage of the education being offered, using all their energies to grapple with the unfamiliar language. Many of them will drop out early for lack of success (Durmian, 2006). It is estimated that for half of children out of school, the language used in school is different to that used at their home (Bender et al, 2005). Members of many ethnic groups often feel left out from schools, as schools are official places where their language and culture may not be recognized.

Upon starting school, children find themselves in a new physical environment. The classroom is new, most of the classmates are strangers, and the center of authority (the teacher) is a stranger too. The structured way of learning is also new. If, in addition to these things, there is an abrupt change in the language of interaction, then the situation can get quite complicated. Indeed, it can negatively affect a child's progress. However, by using the learners' home language, schools can help children navigate the new environment and bridge their learning at school with the experience they bring from home.

Secondly, by using the learners' home language, learners are more likely to engage in the learning process. The interactive learner-centred approach, recommended by all educationalists thrives in an environment where learners are sufficiently proficient in the language of instruction. It allows learners to make suggestions, ask questions, answer questions and create and communicate new knowledge with enthusiasm. It gives learners confidence and helps to affirm their cultural identity (Save the Children, 2007).

Many Zambian children lack adequate knowledge of the English language, which for many years has been used as the language of instruction in schools. In order to address this problem, the Zambian Government, through education minister announced new education reforms to teach all subjects in mother tongue from pre-grade to grade four in all lower primary schools of Zambia. Zambia has 73 tribes of which 25 are outspoken and seven are taught in schools. The seven common languages that were selected to be used for teaching in schools include; Cibemba, Cinyanja, Silozi, Chitonga, Kikaonde, Luvale, and Lunda. The language-in-education (LiE) policy has been received with mixed feelings from many Zambians although Linguists are standing strong to defend this move by government (Lupikisha, 2014). Some quarters of Zambian society say the policy is biased, incomplete, impossible to implement and also a political propaganda. But according to one linguist at the University of Zambia (UNZA), the introduction of local languages as a means of instruction is a good move as it will enhance the education system in Zambia. He believes the policy was made out of empirical evidence and not just a pronouncement (Lupikisha, 2014).

Furthermore, a deputy head teacher at one primary school in Lusaka, Zambia, says the policy is welcome, as it will rebuild the language vocabulary, restore the eroded culture and enhance the levels of understanding among pupils. He adds that people should be patient as the benefits of the policy will take some time to be appreciated. It requires the printing of books in local languages (Lupikisha, 2014). . Some stakeholders have argued that some teachers assigned to teach in the lower primary school, are not competent in the indigenous language and can therefore not use it effectively as a medium of instruction. In addition, there is resistance among those whose mother tongue is not among the seven local languages chosen by government as medium of instruction, and the dominance of the English language. Lamba Chiefs on the Copperbelt province of Zambia resolved to reject the newly introduced government policy to teach Bemba in Copperbelt rural schools stating that it is a violation of human rights to impose a vernacular language on children not of that tribe.

By applying both qualitative and quantitative case study approach, this research will assess the implementation of the language policy of using Chinyanja as the medium of instruction in lower primary schools in Chilanga District, Zambia

## **1.1 Background**

In recent years, many education programmes have increasingly focused on the issue of children who struggle with education because their school does not use the language which they speak. This is often the case in remote and rural settings where the most marginalised groups tend to live. Today 221 million school-aged children are speakers of local languages i.e. languages that are spoken in their home and in their community but not used formally in their schools (Dutcher, 2004)

*Article 30 of the United Nations Convention on the Rights of the Child (UN CRC) states that 'children from minorities have the right to have their own culture and language respected.' The second of the Education for All goals for 2015, as agreed at Dakar, calls 'to ensure that by 2015 all children, particularly girls, children in difficult circumstances and those belonging to minority ethnic groups, have access to and complete free and compulsory primary education of good quality.'*

All children can benefit from learning a second language, as doing so brings social and cognitive gains. A second language can be introduced for communication at an early age at home or at school. Some children in Zambia are exposed to two (or more) languages in their home – many learn both at a comparable pace and consider both their 'first (or home) languages'. Such children are usually viewed as fully bilingual. However, where children need to learn languages which are not used in their home environment, the learning process is different. Because the second language is not constantly available for them to absorb, children need structured support and time to become competent in that language.

Children from minority linguistic communities are rarely offered either of the routes described above, but are surrounded by an unfamiliar second language from the first day they enter the classroom, without either the constant exposure that their home language would provide or targeted academic support. When one considers that by the time a child starts primary school he or she has had around five years of constantly learning their first language, it is little surprise that many do not easily 'pick

up' a new language when they start school, particularly when they have little or no exposure to the second language in their daily life.

*It is widely agreed that it takes at least five years for a child to have enough vocabulary to use a language for academic purposes; that is, before s/he is considered proficient enough in the use of the second language to learn subject content through it. More recent research has suggested it may actually take seven years. As a child who enters an unknown language environment in their early education does not have this foundation, he/she is being asked to accomplish an enormous task – learn to communicate in a new language, learn literacy in this unfamiliar language and learn concepts in this language – all at the same time. This process is highly inefficient, causing repetition, failure and dropout for all but a few who are somehow able to break the language 'code'9, i.e. those who learn to understand, read and write in an unfamiliar language without help (Save the Children 2007).*

## **1.2 Statement of the Problem**

Zambia's LiE Policy highlights a number of benefits regarding the use of mother tongue in initial literacy. However, it has been nearly four years since the language policy was adopted; yet there is almost no empirical data to show whether the implementation is moving in the right direction towards achieving the set goals. In the absence of empirical data regarding the effectiveness of its implementation, there is a possibility that the policy may be nothing much but a white elephant. Admittedly, it is highly daunting to precisely pin-point the challenges that may hinder policy implementation due to a myriad of interconnected factors.

For the purpose of this study, it was sufficient to situate the 'statement of problem' around three key factors which according to literature review, are critical in ensuring that the LiE policy is effectively implemented i.e. teacher competency in the local language, availability of teaching and learning materials in the local language, and acceptance by stake holders of the local language chosen by government as medium of instruction in the particular region. In Zambia, the truth is that English is dominating and the government is promoting its use as a language of business, commerce and industry. Consequently, English is still regarded by many as being more important than other indigenous languages. Parents who send their children to English medium private schools also encourage this notion. At the same time it is clear that the majority of parents cannot afford this

'luxury' and their children suffer the consequences of not being proficient in English (Mc Donald, 1990).

This research has tried to assess the three implementation of LiE policy around the three factors above i.e. teacher competency in the local language, availability of teaching and learning materials in the local language, and acceptance of the chosen local language by stakeholders (parents and guardians of affected school children) whose mother tongue is not among the seven local languages chosen by government as medium of instruction.

### ***1.3 Purpose of the study***

The purpose of the study was to assess the implementation of the LiE policy of using Chinyanja as the medium of instruction in lower primary schools in Chilanga District, Zambia. Specifically the study assessed teacher competency in the use of local language, availability of teaching and learning materials in the local language, and degree of acceptance of the choice of local language used as a medium of instruction by stakeholders. This is important because these three factors are critical to the effective and successful implementation of LiE policies. The study's objectives were to explore the insights of the policy and its feasibility in terms of implementation; to consider issues and strategies vital to its successful implementation and to offer options for consideration by Government.

### ***1.4 Main and Specific Objectives***

The main objective of the study was to assess the implementation of the LiE policy of using Chinyanja as the medium of instruction in lower primary schools in Chilanga District, Zambia. The following were the specific objectives of the study:

- To assess teacher competency in the use of indigenous language i.e. Chinyanja as a medium of instruction in lower primary school in Chilanga District.
- To ascertain the availability of learning and teaching materials written in indigenous language in the schools in Chilanga District where the policy is being implemented.
- To determine the level of acceptance of Chinyanja as a language of instruction in the study site by stakeholders whose mother tongue is different.

## ***1.5 Research questions***

This research will try to answer the following key questions:

- Are teachers allocated to teach lower primary school grades competent in the use of the local language as a medium of instruction?
- Are learning and teaching materials written in the local language readily available and in sufficient quantity for use in the lower primary schools?
- Have all stakeholders (parents and guardians of children in the lower primary schools) accepted the use of Chinyanja as a medium of instruction in those schools?

## ***1.6 Significance of the Study***

Equal opportunity in education is a priority for the government but for many years language in education has not received the attention it deserves. This research is an assessment of the LiE policy and practice in Zambian lower Primary school grades. It is particularly relevant because many Zambian children learn one or more languages at home, but find a new and unknown language (English) at school. Research has revealed that language and achievement are closely linked and the use of English language as a medium of instruction in Zambia contributes a great deal to the high failure rate and dropout rates among students. Theoretically, pupils have a right to education in the language of their choice. However, it is argued that the practical implementation of the LiE policy is not feasible were teachers are not competent in the local language of instruction, there are inadequate books written in the indigenous languages and there is little enthusiasm among stake holders regarding the choice of the local language used as a medium of instruction.

This study, therefore, is important because of its implications for generating knowledge that may be useful for addressing the challenges the Zambian government may face in the implementation of the LiE policy. Although there are many studies, which have contributed to the understanding the use of mother tongue in initial literacy, the Zambian case is characterized by knowledge gaps when it comes to transforming policy into practice. On that note, this study was not only significant, but also timely in that it will help to bridge that gap.

## **1.7 Theoretical Framework**

The theoretical framework analyzed those perspectives, which are relevant to the study. The conceptual framework, on the other hand, outlined the main concepts of the study and went further to highlight how they are connected to the key research questions. The theoretical and conceptual framework informed the methodology and above all served as the reference point for data analysis and discussion of findings.

The theoretical framework is a critical component in social science research in the sense that it serves as a guidepost for the theoretical perspectives, which underpin a given theme under investigation. In a case study design, theories can be applied in order to explain, predict, and understand particular social phenomena but also, “to challenge or build on the existing knowledge within the context of what is termed as critical bounding assumptions” (Denzin & Lincoln, 1994). As such, the theoretical framework gives an opportunity to demonstrate how one understands the theories underlying the research topic (Patton, 2002). In this regard, the statements of the problem as well as the research questions serve as the building blocks on which the theoretical framework is anchored.

There are theoretical underpinnings that profoundly motivate the advocacy for indigenous language policy. To explore why language is a problem in education for many children, an understanding of how children learn - and particularly how they learn languages - is important. Often the biggest barrier to quality, relevant education is that education planners and policy makers do not have access to information about the building blocks of learning.

The Cummins (1979) interdependence theory explains the positive transfer of literacy skills from L1 to L2. He argues that the level of literacy competence in L2 that a child attains is partially a function of the level of competence the child has in L1 at the time L2 teaching begins intensively. Thus, if an education system submerges learners in L2 without first trying to further develop the skill they already have in L1, the school risks impeding their competency in L2 for years to come, while also limiting continued, autonomous development of their L1. This is because the sustained use of a foreign language of instruction in schools negatively impacts the way children learn to think, thus interfering with their cognitive development.

(Wigglesworth & Simpson, 2008) support the idea that a child’s initial acquisition of language is vital to their learning how to think. Therefore, when education system imposes a foreign language on

children, disregarding their initial contact with a language and pattern of processing new information, inhibits their development of cognitive function. Once the students have basic literacy skills in the L1 and communicative skills in the L2, they can begin reading and writing in the L2, efficiently transferring the literacy skills they can have acquired in the familiar language. The pedagogical principles behind this positive transfer of skills are Cummins' (1991, 1999) interdependence theory and the concept of common underlying proficiency, whereby the knowledge of language, once oral L2 skills are developed, and no re-learning is required. Consistent with these principles, it is possible for children schooled only in the L2 to transfer their knowledge and skills to the L1, but the process is highly inefficient as well as being unnecessarily difficult.

According to June Jordan (2009), you will never teach a child a new language by scoring, ridiculing and forcibly erasing his first language. At the beginning of education, mother tongue instruction is very important not only to develop a strong educational foundation, but also to strengthen the cognitive development of learners. Unless the mother tongue is used in education, there is a big gap between the student's home and the school. By developing literacy skills in the first language, mother tongue-based multilingual education helps strengthen the first language and provides a smooth transition from L1 (first language) to L2 (national language) or L3 (international language) to be used as a medium of instruction.

Mother tongue-based education has a positive impact on educational and learning outcomes in most of the developing countries. A child's home language can effectively be used as a language of instruction in the early years of their schooling as a bridge to learning. The positive reinforcement decreases rates of repetition, failure and dropouts, and provides long-term benefits like higher self-esteem, greater self-confidence and higher aspirations for schooling and life (UNESCO, 2006). L1 classrooms allow children to express themselves, contribute to discussions and develop their intellects as conversations are carried out in a familiar language. This is thought to lead to more satisfaction from the education system, therefore reducing dropouts and because learners are able to keep up with what is going on or at least feel they can ask questions where they do not understand, rates of failure and repetition decrease. In contrast, learners in submersion classrooms are forced to sit silently or repeat mechanically, leading to frustration and ultimately repetition, failure and dropout (Benson, 2004).

Mother tongue-based multilingual education program have been established in many minority language communities around the world. Most teachers, principals and parents of children in that program have found that students who begin learning in their home language: (a) Have more confidence in themselves as learners; (b) Participate more actively in classroom discussions; (c) Ask more questions; (d) Demonstrate a deeper understanding of the subjects; (e) Learn to read more easily and understand what they read; (f) Learn to write more easily and express themselves better in written form; and (g) Learn the school language i.e. oral and written more easily and with greater comprehension.

### ***1.8 The Conceptual Framework***

The process of reviewing the literature leads to the delineation of the conceptual framework in terms of how it relates to the background of the study (Berger and Patchener, 1988). In their endeavour to understand how the conceptual framework guides the entire research process, Berger and Patchier raised an important question which one has to consider: Is there a clear and explicit connection between the theory and the aim of the study? The researcher has to ask himself this question as well: Has the conceptual framework of the study clearly described the key concepts of the study as they relate to the statement of the problem and the literature review?

Therefore, the rationale for the conceptual framework in this study is to outline key concepts and to explain how they are linked to the other components of the study. In research such as this, concepts are critical because they among other things serve as guild in making research conclusions, making meanings of reality and besides serve as a tool for understanding the phenomena being studied (Cohen.,et al, 2000). Robson (1993) noted that developing a conceptual framework forces you to be explicit about what you think you are doing. It also helps you to be selective; to decide which are the important features; which relationships are likely to be of importance or meaning; and hence, what data you are going to collect and analyze. In the preamble, the perceived gap between policy and practice, as it pertains to use of Chinyanja as a medium of instruction, was highlighted. Using that as a point of departure, the concepts of 'policy' and 'practice' are thus defined below in accordance to how they are applied in this study.

### **Conceptualizing the term “Policy”**

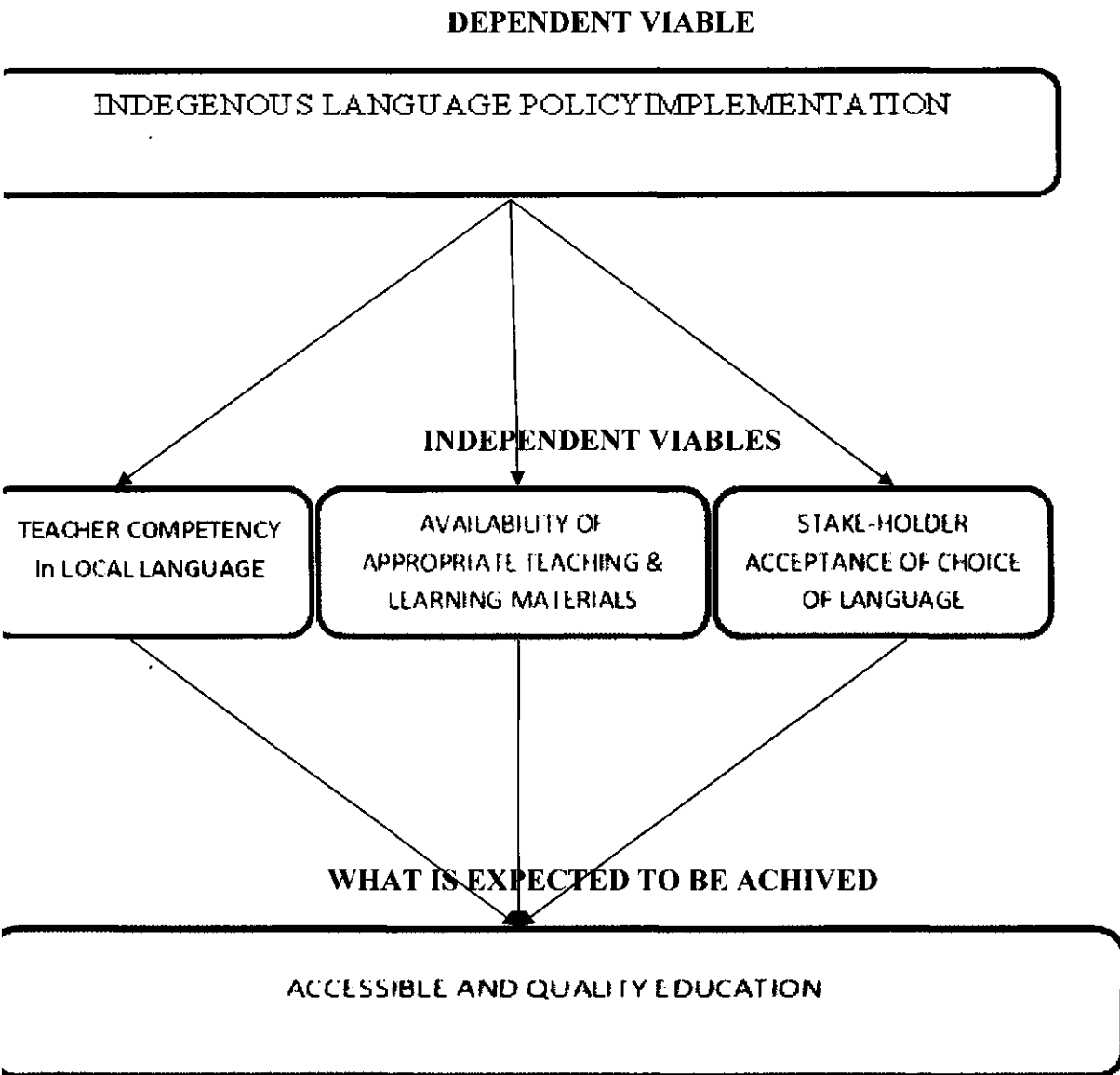
Zambia’s Language in Education Policy can be seen as a by-product of public policy analysis since it encompasses the entire process of policy making beginning from the conception, adoption and formulation stage up to implementation (practice) by DEBs. In this study, the term policy is defined as, “an explicit or implicit single decision or group of decisions which set out directives for guiding future decisions, initiate or retard actions or guide implementation of previous decisions” (Haddad & Demsky,1995). Essentially, policies are driven by implicit or explicit ideologies and motives which are deeply rooted in politics.

### **Practice of Policy**

Just like policy, the concept of ‘practice’ has assumed greater significance in policy making processes. This is due to the manner in which it (practice) influences implementation and the nature of policy outcomes. Note however that policy and practice are interlinked. Hence, they are an integral part of the policy making process in educational planning. In theory, practice may be synonymous to policy implementation. The concept of practice is nonetheless, understood as, “a way by which individuals and groups engage in situated behaviours which are both constrained and enabled by existing structures but essentially those which allow individuals to exercise agency given the circumstances” (Sutton & Levinson, 2001:23). Yet, one can argue that although policy influences the practice, a good policy does not necessarily guarantee good practice and neither can impromptu policy decisions trigger meaningful policy outcomes although, this may not be always the case. It is clear why even though Zambia’s LiE Policy is well articulated; the manner it is practiced is at best problematic, at least, based on the general impression on implementation so far.

According to this research, if Zambia’s Language in Education Policy is well implemented, it will lead to accessible and quality education. However, this is only possible if the three key variables are in place i.e. teacher competence in use of local language as a medium of instruction, availability of adequate teaching and learning materials in local language and stake-holder acceptance of choice of language of instruction.

## The Conceptual Framework



Source: Author, 2016

According to the conceptual framework above, the implementation of the LiE policy is dependent on teacher competence in use of local language as a medium of instruction, availability of adequate teaching and learning materials in local language and stake-holder acceptance of choice of language of instruction. When these independent variables are in place, there will be greater access to quality education.

## CHAPTER 2: LITERATURE REVIEW

It is unfair to expect young children to begin learning subject content in a second language. Yet it is impractical to postpone teaching the child until they have acquired second language proficiency. Therefore it is most logical and fair to begin teaching all children in their first language, whilst teaching them the second or additional languages, until they are ready to learn in that second language.

*'Mother tongue based bilingual education' means starting with the learner's knowledge and experiences; providing the child with a foundation in their first language; and building a second language on this. Oral, reading, writing and thinking skills are developed in the first language, while teaching the second language as a subject. Exposure to the second language gradually increases, without sacrificing children's literacy and cognition in the first language (Benson, C. 2005).*

Children who attend such bilingual programs are more active in the classroom, and they can easily transfer concepts that were taught in the first language to the second language. Children who become literate in their first language and transition gradually to the regional or national language of instruction perform better academically than minority children who study only in the regional or national language (Cummings and Tamayo, 1994). An emphasis on local languages in education does not diminish the child's chance for further education in a second (or additional) language - in fact it enhances it. Children who are well educated in their first language are more likely to become proficient in national and international languages.

In multilingual settings, adopting a 'strong bilingual' education approach is most likely to boost a child's chances of learning and progressing well through school. Strong bilingual models use the first language as the medium of instruction for several years, with the second language taught as a subject. The changeover to the regional or national language of instruction often happens in lower secondary. Alternatively, a combination of both first and second languages can be used for instruction to the end of school - with the first language never removed from education as a medium of instruction. However, even limited use of a child's first language in school will promote some recognition of the value of the language and identity of the learner.

Recruitment of teachers who speak local languages (or teachers from local language groups) can be a difficult task. Members of minority ethnic groups often struggle to progress through the education system due to language and other barriers, and so in many cases there are few teachers from these minority ethnic groups. Those that have become teachers have usually been educated in the national language and therefore do not have the experience or capacity to teach in their first language. Vacant posts are often located in isolated areas where teachers may not want to live.

In many countries the notion of having one language used in education is key to ideas of national unity. Attempts to bring multiple languages into education can be seen as attempts to destabilize that unity. However, history shows that efforts to replace minority languages with the official language often alienate individuals and communities instead of fostering national harmony. An effective means to challenge such efforts is to demonstrate through pilot projects that the national language is best acquired if children first acquire competence in their first language. Some countries like Tanzania and India and have mounted campaigns to raise consciousness and disseminate information about the results of such pilots.

Most developing countries are trying to cope with limited budget expenditure for basic education, so naturally fear that adding a bilingual programme would require unavailable resources, such as additional textbooks in local languages and additional teacher training. Although extra investment is needed initially, the cost benefits of enabling all children to benefit from an education are strong: children's dropout rates reduce and the economic and employment opportunities increase, outweighing any initial investment (Komarek, 1997).

In areas with less exposure to the dominant language in everyday life, teachers may lack the fluency to conduct all teaching in the language of instruction, so they tend to 'code-switch', going back and forth quickly between languages. This often results in confusion and piecemeal understanding for the children. Teachers that are fluent in both languages often spend time translating into local language, reducing the time available for learning actual content. The danger with this approach is that children end up ineffective learners, lacking skills in both their own language and in the language of instruction, and making slow progress through the curriculum.

Where learning a foreign or ex-colonial language such as English is seen as the surest route to a good job and influence in society, parents can demand education in English for their children, sometimes switching from public education in local languages to English-medium private schools. Unless children have both significant exposure to English in their home life and very skilled teachers, teaching the curriculum in English (as opposed to teaching of English as a second language) is unlikely to deliver the competency needed to do well in life or learning. This is not to say that such schools produce no English speaking children, but the process is not easy, the standards of achievement are not as high as expected and many children fall out along the way.

*An explicitly supportive national policy is needed to enable schools to provide instruction in children's first languages. Experience has shown that where education policies simply do not mention the language of instruction, education officials instruct schools to use the national language – either because they are not aware of the damage this does to minority children's education, or because there is a tacit desire to promote the national language in minority communities. In contexts where the national language is seen as important for promoting national unity, it is particularly important for national government to send clear signals throughout the education system that children should be enabled to learn in their own language as well as learning the national language (Dutcher, 1995).*

National education policy should guarantee minority children access to the national language through bilingual or multilingual education. Policies should require strong bilingual education approaches, i.e. with at least 5 years of instruction in children's first language, and teaching of the national language before transition to instruction in the national language. In some cases bringing in national language classes would have implications for adding to or replacing some of the existing school timetable for minority children.

While there are many factors involved in delivering quality basic education, language is clearly the key to communication and understanding in the classroom. Many developing countries are characterized by multilingualism; yet continue to allow a single foreign language to dominate the education sector. Instruction through a language that learners do not speak has been called "submersion" (Skutnabb-Kangas 2000) because it is analogous to holding learners under water without teaching them how to swim. Compounded by chronic difficulties such as low levels of teacher education, poorly designed, inappropriate curricula and lack of adequate school facilities, submersion

makes both learning and teaching extremely difficult, particularly when the language of instruction is also foreign to the teacher.

Mother tongue-based bilingual programs use the learner's first language, known as the L1, to teach beginning reading and writing skills along with academic content. The second or foreign language, known as the L2, should be taught systematically so that learners can gradually transfer skills from the familiar language to the unfamiliar one. Bilingual models and practices vary as do their results, but what they have in common is their use of the mother tongue at least in the early years so that students can acquire and develop literacy skills in addition to understanding and participating in the classroom. Bilingual as opposed to monolingual schooling offers significant pedagogical advantages, which have been reported consistently in the academic literature (see reviews in Baker2001; Cummins 2000; CAL 2001):

In cases where two or more languages are spoken in the home or locality, schooling may be provided in one of the learner's home languages, in another local language, or in a lingua franca; for lack of a better term for these contexts, this paper uses "mother tongue" or L1 to refer to any language in which school-aged children are competent.

*Use of a familiar language to teach beginning literacy facilitates an understanding of sound-symbol or meaning-symbol correspondence. Learning to read is most efficient when students know the language and can employ psycholinguistic guessing strategies; likewise, students can communicate through writing as soon as they understand the rules of the orthographic (or other written) system of their language. In contrast, submersion programs may succeed in teaching students to decode words in the L2, but it can take years before they discover meaning in what they are "reading." Since content area instruction is provided in the L1, the learning of new concepts is not postponed until children become competent in the L2. Unlike submersion teaching, which is often characterized by lecture and rote response, bilingual instruction allows teachers and students to interact naturally and negotiate meanings together, creating participatory learning environments that are conducive to cognitive as well as linguistic development (Cummins 2000).*

Explicit teaching of the L2 beginning with oral skills allows students to learn the new language through communication rather than memorization. In submersion schooling teachers are often forced

to translate or code-switch to convey meaning, making concept learning inefficient and even impeding language learning, while bilingual programs allow for systematic teaching of the L2.

Transfer of linguistic and cognitive skills is facilitated in bilingual programs. Once students have basic literacy skills in the L1 and communicative skills in the L2, they can begin reading and writing in the L2, efficiently transferring the literacy skills they have acquired in the familiar language. The pedagogical principles behind this positive transfer of skills are Cummins' (1991, 1999) interdependence theory and the concept of common underlying proficiency, whereby the knowledge of language, literacy and concepts learned in the L1 can be accessed and used in the second language once oral L2 skills are developed, and no re-learning is required.

Consistent with these principles, it is possible for children schooled only in the L2 to transfer their knowledge and skills to the L1, but the process is highly inefficient as well as being unnecessarily difficult. Code switching and code mixing involve alternation between languages, and are common communication strategies in bi- and multilingual contexts. Code alternation functions best when all parties are competent speakers of the languages involved, but in submersion classrooms it is more of a coping strategy for dealing with a foreign instructional medium and does not necessarily contribute to second language learning. As specialists Lanauze & Snow explain, transfer means that "language skills acquired in a first language can, at least if developed beyond a certain point in L1, be recruited at relatively early stages of L2 acquisition for relatively skilled performance in L2, thus shortcutting the normal developmental progression in L2" (Lanauze & Snow, 1989).

Student learning can be accurately assessed in bilingual classrooms. When students can express themselves, teachers can diagnose what has been learned, what remains to be taught and which students need further assistance. In submersion schooling cognitive learning and language learning are confounded, making it difficult for teachers to determine whether students have difficulty understanding the concept itself, the language of instruction, or the language of the test. The affective domain, involving confidence, self-esteem and identity, is strengthened by use of the L1, increasing motivation and initiative as well as creativity. L1 classrooms allow children to be themselves and develop their personalities as well as their intellects, unlike submersion classrooms where they are forced to sit silently or repeat mechanically, leading to frustration and ultimately repetition, failure and dropout.

Bilingual programs encourage learners to understand, speak, read and write in more than one language. In contrast, submersion programs attempt to promote skills in a new language by eliminating them from a known language, which may actually limit learner competence in both. All of these advantages are based on two assumptions: one, that basic human needs are being met so that schooling can take place; and two, that mother tongue-based bilingual schooling can be properly implemented. Simply changing the language of instruction without resolving other pressing social and political issues is not likely to result in significant improvement in educational services. However, because language cross-cuts race, ethnicity, gender, and poverty, even minimally implemented bilingual programs have the potential to reach those who have traditionally been left behind by L2 submersion schooling. This paper will discuss how choosing an appropriate language of instruction has positive implications for education in terms of both increasing access and improving quality.

### **Policy development and implementation of bilingual programs**

The introduction of mother tongue-based policies and programs normally goes beyond pedagogical motivations to address social and political aims. While it should be remembered that any one program represents a combination of aims, the following illustrate a sampling: There have been a few historical precedents for use of the L1 in developing countries, with both positive and negative implications for current practice. For example many ex-British colonies inherited mother tongue schooling as part of separate and unequal development. In the case of India this meant marginalization of Indian languages with regard to power, yet “contact with English triggered renaissance in the major Indian languages and set in process their modernization” (Annamalai 1995); in the case of South Africa unequal development evolved into Bantu education during apartheid, which furthered racist goals yet developed methods and materials for mother tongue instruction that can be applied today to more equitable schooling (Heugh2003). Another historical precedent is missionary use of local languages throughout the world which, while focusing on communication of religious messages, has contributed to the development of orthographies, grammars and basic literacy materials and skills in many of the world’s languages (see e.g. Grimes 2000). Some initiatives have come more recently as reactions to colonial systems, with results such as the growth of Kiswahili in

New, more inclusionary policies are being directed toward traditionally marginalized groups, particularly in Latin American contexts. For example, Guatemala initiated mother tongue-based schooling to remedy the situation where only about 40 percent of its rural Maya language-speaking population enrolled in school and half of them dropped out by the end of first grade (Dutcher, 1995). Bolivia, whose indigenous population is two to three times that of the monolingual Spanish-speaking elite, is in the process of implementing a comprehensive education reform that promises bilingual intercultural schooling for all, while complementary decentralization and popular participation measures set up structures for more democratic decision-making about schooling and other social issues (Albó & Anaya, 2003).

More recent efforts in mother tongue schooling bring some new dimensions to the practice. Perhaps the most dramatic and challenging is implementation of South Africa's post-apartheid policy of 11 official languages; this can be seen in the context of a continent-wide movement for revalorization of indigenous knowledge now known as the African Renaissance (Alexander 2003), which holds that "cultural freedom and African emancipation...cannot be cultivated, expanded or developed" where the languages in which people are "most creative and innovative" are not languages of instruction (Prah 2003: 17). In Latin America there have been corresponding demands—perhaps less united but increasingly active—by original peoples for appropriate cultural and educational policies (von Gleich, 2003). Some Asian countries have explicitly valued linguistic and cultural pluralism, as demonstrated in the constitutions of Myanmar, Thailand and Vietnam, and the Indonesian constitution goes further to guarantee the use and development of local languages in education, though in most cases implementation is far from meeting stated goals (Kosonen 2004).

There are bilingual schooling programs with clear development goals; for example, experimentation in Mozambique began following a conference on how to reduce the high repetition, failure and dropout rates plaguing basic education. This was also a principal motivation in the well-documented Six-Year Primary Project in Nigeria (Fafunwa et al. 1989) whose results clearly supported long term mother tongue development. Some countries have followed up on the successes of mother tongue use in non-formal education and in community schools by adapting their models and materials for use in formal schooling, which Cambodia has just begun doing in several languages of the eastern highlands (Thomas 2003, cited in Kosonen 2004) and which Papua New Guinea has been doing for some years in about 400 languages (Klaus 2003; Kosonen 2004). Such initiatives have received more attention

and support in recent years from donor agencies interested in improving educational quality and equity while promoting democracy (see e.g. Sida 2001).

### **How programs have been introduced**

Experimentation is a common means for introducing mother tongue-based schooling. Such piloting is useful for determining how a bilingual model can be implemented given local conditions, and what types of technical and material input are required to make the program successful before going to scale. Experimentation has led to wider-scale implementation in countries like Bolivia, Guatemala and Nigeria, but it has also been associated with stagnation and deterioration of models in countries like Niger and Guinea-Bissau (Hovens 2003) despite having met with relative success. The gap between experimentation and implementation is often deepened due to unreasonable expectations for pilot studies to prove or disprove the effectiveness of bilingual schooling, and this based solely on test scores (Benson 2004a); as Fishman (1991) notes, this misguided recourse to “scientific proof” is simply a delay tactic for authorities who wish to seem sympathetic to language issues without committing themselves to establishing policies or allocating resources. In more supportive political climates, experimentation has paved the way for official decision-making.

In some contexts mother like Zambian situation, mother tongue-based programs have been introduced on a national scale by top-down methods, where government has legislated change and expected the education sector to implement it, whether or not piloting has been done and whether or not adequate resources have been mobilized. Such was the case of the original imposition of Chichewa-English bilingual schooling on all Malawians, which favored Chichewa speakers over speakers of other languages, and again in 1996 when the policy changed to include all mother tongues without regard for teacher training and posting or materials development (Mtenje & Mchazime 2001). Tanzania’s implementation of Kiswahili-English schooling was more successful because it reached both first- and second-language speakers of Kiswahili and was part of an ideological movement under a respected leader, yet the policy appears to be deteriorating from both ends—failure to use mother tongues and the pressure of global English—as well as from the middle, because Kiswahili has not been used as planned at the secondary or tertiary levels (Abdulaziz 2003; Rubagumya 1991; Ouane 2003). In the case of Bolivia, legislation was passed and implementation begun before the support of all the actors had been secured, so the early years were marred by resistance on the part of teachers’ unions and

communities, requiring vigorous local indigenous group efforts as well as national public relations campaigns to eventually convince those concerned (Albó & Anaya 2003).

Introducing mother tongue schooling from the grassroots level is not easy from a large-scale organizational standpoint, yet it is the most promising in terms of community commitment and sustainability. Because communities and NGOs may already be using local languages for community development, literacy, informal and non-formal education and other participatory knowledge-sharing mechanisms, they are empowered to make decisions about which languages are used and for what purposes. One example of this is a primary improvement project in Vietnam that has begun to use the mother tongue for 15 percent of the school day as part of a “local curriculum” component (CAL 2001: 98). In addition, locally-produced materials raise the status of home languages and may contribute to development of these languages by establishing orthographies, grammars and dictionaries along with publishing stories and materials covering relevant themes; such is the case in Mauritius, where an NGO known as LPT has been publishing creative literature along with basic reading materials in Kreol and Bhojpuri for over 25 years, contributing to their standardization and diffusion in anticipation of a future when they will be allowed into formal schooling (Ah-Vee 2001).

Alexander (1989) suggests that bottom-up practices are a good foundation for strong programs because they allow all stakeholders to contribute to raising the status of the mother tongue in the community and classroom, but their efforts must be enabled by legislation at the official level, so that they meet somewhere in the middle. To this end, Alexander and others have formed a consortium called the Multilingualism Action Group (Heugh 2003) that helps grassroots organizations lobby for more coherent language policy and practice in South African schools. Hornberger would agree: “No matter what the goal, language/literacy development proceeds best if goals are pursued along several dimensions at once” (1994: 82). Hornberger adds that increasing numbers of mother tongue readers and writers will inevitably lead to fuller social participation as well as facilitating progress in implementation of mother tongue schooling, especially in terms of available teachers and written materials.

## **Challenges and how they have been confronted**

Mother tongue-based bilingual schooling is seldom disputed on the basis of its pedagogical reasoning, and if decision-making were to be based solely on how to provide the highest quality education for the learner many more of the world's languages would be used in education today. The structural challenges to implementation related to political decision-making have just been discussed; this section begins with some widely believed myths, and then takes up more practical aspects of implementation.

The following myths and attitudes are regularly used to challenge use of mother tongues in education, yet their false arguments are easily revealed:

The colonial concept that a nation-state requires a single unifying language has influenced policy-makers in many parts of the world, yet imposition of a so-called “neutral” foreign language has not necessarily resulted in unity, nor have relatively monolingual countries like Somalia, Burundi or Rwanda been guaranteed stability. In fact, government failure to accept ethno linguistic diversity has been a major destabilizing force in countries like Bangladesh, Pakistan, Myanmar and Sri Lanka (Ouane 2003).

Another colonial concept is the supposed inherent worth of European languages in contrast to others, but all human languages are equally able to express their speakers' thoughts and can develop new terms and structures as needed. Léopold Senghor once illustrated this by translating Einstein's Theory of Relativity into Wolof, a lingua franca of Senegal. The difference lies in which languages have historically been chosen for “intellectualization,” or development, through writing and publishing (Alexander 2003).

There is a myth that bilingualism causes confusion and that the first language must be pushed aside so that the second language can be learned. The research evidence to date shows the opposite to be true: the more highly developed the first language skills, the better the results in the second language, because language and cognition in the second build on the first (Cummins 1999, 2000; Ramirez et al. 1991; Thomas & Collier 2002). Further, there is no evidence that the L2 must be a medium of instruction to be learned well; countries like Sweden achieve high levels of L2 competence by teaching it as a subject and preserving the L1 for instruction.

The foreign L2 is often seen as necessary for further education, work and other opportunities, yet as Phillipson (1992) points out this has not happened in a political vacuum but is the result of deliberate promotion by powerful countries or groups of their respective languages. Meanwhile, employment in the informal sector of low-income countries involves 50 percent or more of the population and is increasing, and primary schooling is still terminal for most. The vast majority will not be integrated into the global marketplace and will have little use for the L2 (Bruthiaux 2002).

There is a myth that parents want L2-only schooling. The poorest and most marginalized are acutely aware that their access both to education and to the high-status language has been limited, and they have a right to expect the school to teach their children the same language that has benefited the elite. Undoubtedly parents will choose the L2 when presented with an either-or proposition; however, studies (see e.g. Heugh 2002) have shown that when parents are allowed to make an educated choice from appropriate options, they overwhelmingly opt for bilingual rather than all-L2 programs, and most bilingual program evaluations report high levels of community support (CAL 2001). The attitudes reflected by these myths provide a background for understanding other more practical challenges of implementing mother tongue-based bilingual schooling. The logistics of school reform in economically disadvantaged countries are admittedly daunting no matter which innovations are being considered, and the use of previously underdeveloped languages raises special issues. While these issues continue to challenge use of the mother tongue in school, as Hornberger points out, “Nearly all...objections and limitations have met with creative and effective solutions in one case or another over the past forty years” (1994: 77). The following are the most challenging logistical aspects:

First, there is poverty and the meeting of basic needs. Mother tongue-based schooling is often directed at the most marginalized of populations who have suffered from lack of services of all kinds, not only of schooling. Failure to meet basic human needs for food, shelter and health is the single greatest obstacle to providing quality primary schooling for all, and when bilingual schools are characterized by chronic illness among students and teachers, inadequate nutrition, and lack of basic facilities just as non-bilingual schools are, it is unlikely there will be dramatic differences in school performance. While more wide-ranging services are recommended, the following are attempts to deal with human needs along with linguistic ones:

- In Bolivia, pre-schools and bilingual primaries for remote indigenous populations are also served by school feeding programs, which have significantly raised both school attendance and levels of nutrition (UNICEF 1998).

- Experimental bilingual programs such as those in Guinea-Bissau and Niger (Hovens 2003) included curricular adaptations, adding more relevant subjects like preventive health.

Secondly, there is need for human resource development. Teacher training must be addressed no matter what the innovation, and bilingual schooling should not be undertaken without serious consideration for in-service (especially in the short run) and pre-service training (in the long run). Provision of short in-service trainings during school vacations often leaves bilingual teachers with limited language skills and inadequate understanding of the bilingual teaching methodologies required by the adopted model. An added challenge is to find or train teachers proficient in the L2. The challenge grows exponentially when policy dictates nationwide implementation before there has been adequate investment of time and resources in teacher training. This taxes systems beyond their capability, resulting in even less training, the hiring of unqualified teachers, inappropriate linguistic placement of teachers, and so on, undermining implementation of the model and limiting the degree to which it can demonstrate results.

Thirdly, there is need for linguistic and materials development. A serious investment of time and resources, along with a commitment to collaboration between linguists, educators and community members is required to prepare materials for bilingual programs, particularly if the L1 is to be used over a period of many years (as would be suggested for the gradual transitional or maintenance models described below) and particularly if the languages in question have not traditionally been used in written form. Corpus planning, which expands the functions of a language, has three main elements (Cooper 1989): harmonization, which determines the degree to which a range of varieties can be considered one language; standardization, which selects a norm and determines its orthography and grammar; and elaboration or intellectualization, which adapts the language for more abstract forms of expression like those needed for school learning.

Implementation is often challenged by decision-makers' failure to allocate resources to these efforts, but other obstacles are created by failure of linguists to reach agreement, or imposition of decisions on the linguistic community without having involved them in the process. To meet the demands for educational materials, most programs do not wait for all of the linguistic decisions to be made but become part of the process by involving communities: Even though this policy helped keep bilingual

teachers in remote areas, it was opposed by non-bilingual teachers and had to be abandoned two years later (Albó & Anaya 2003).

Centralized decision-making creates conflict if it contemplates only one language-in-education model for all without considering variation in language use. While rural areas are often relatively homogeneous with only one L1 to deal with in a bilingual program, urban or suburban areas may require more creative classroom organization models. The educational language policy needs to be flexible enough to allow for decentralized decision-making. This way, implementation of mother tongue-based bilingual schooling in linguistically homogeneous areas—where it is most urgently needed and most easily operationalized—will not be postponed indefinitely because the same model might not work elsewhere. Some ways that have been found to address this issue are:

Education ministries often object to the perceived cost of changing the language of instruction, contemplating the large investments needed particularly in teacher preparation and materials development. This may prevent decision-makers from considering large-scale implementation, allowing them to maintain submersion programs or minimal use of the mother tongue (in preschool programs or only oral use in early primary), or it may limit the effects of otherwise well designed policies. Resource allocation is essential to any educational innovation, but bilingual programs are initially more costly than others, due primarily to the need for intellectualization of previously undeveloped languages and production of instructional and supplemental materials in those languages. In places characterized by extreme linguistic diversity, this may mean small print runs for minority languages, making them less attractive to commercial publishers.

Some World Bank scholars (Chiswick et al. 1996; Vawda & Patrinos 1998) have been working on cost-benefit analyses that relate the costs of status quo schooling (repetition and dropout as converted into per-pupil expenditure) to the costs of implementing bilingual schooling (teacher training and materials development), given that bilingual schooling greatly reduces student wastage. Applied to bilingual education in Guatemala, they have found that the initially higher costs of implementing mother tongue programs are outweighed by the savings due to more efficient schooling after only two years (Patrinos & Velez 1996).

Well-documented empirical studies of mother tongue-based bilingual programs in developing countries began appearing in the 1970s and still form the basis of what is done in the field today. Some of the benchmark studies are these:

- Modiano's (1973) study in the Chiapas highlands of Mexico found that indigenous children efficiently transferred literacy skills from the L1 to the L2 and out-performed monolingual Spanish speakers. Modiano also qualitatively explored how teachers from the same linguistic and cultural communities as their students were uniquely suited for their work.
- The Six-Year Yoruba Medium Primary Project (Fafunwa et al. 1975; Akinnaso 1993; see Adegbiya 2003 for other references) demonstrated unequivocally that a full six-year primary education in the mother tongue with the L2 taught as a subject was not only viable but gave better results than all-English schooling. It also suggested that teachers should be allowed to specialize in L2 instruction. It should nevertheless be remembered that "minority" groups can number in the hundreds of thousands, so linguistic surveying is important to this effort.
- The Rivers Readers Project, also in Nigeria, showed how mother tongue materials of reasonable quality could be developed even where resources were scarce and even for previously undeveloped languages with small numbers of speakers (Williamson, 1976). Communities themselves provided competent native speakers and funds for language development, producing over forty publications in fifteen languages.
- Large-scale research on Filipino-English bilingual schooling in the Philippines (Gonzalez & Sibayan, 1988) found a positive relationship between achievement in the two languages, and found that low student performance overall was not an effect of bilingual education but of other factors, especially the low quality of teacher training (see also Dutcher 1995).

More recent work demonstrates similar findings and goes beyond these to illustrate the positive aspects of mother tongue-based bilingual programs listed above. Specifically, facilitated bilingualism and biliteracy. In an effective bilingual program students become bilingual, or communicatively competent, in the L2 as well as the L1, and biliterate, or able to read, write and learn in both languages. Since these skills take some time to develop, what is noticeable in the early years is the ease at which children learn beginning literacy and content through the mother tongue; this is a

common observation among teachers (Ouane 2003). After three to four years the effects of biliteracy are more measurable (see reviews in Komarek 1997; Dutcher 1995), which is consistent with findings from North America (Ramirez et al. 1991; Thomas & Collier 2002) that the more the L1 development, the better the results in both languages.

Not all experimental studies have been able to demonstrate that bilingual students have significantly better test performance than non-bilingual students, but this is attributable to basic needs not being met, to the impossibility of controlling all of the social, cultural and logistical variables, and/or to testing only in the L2 before bilingual students have been adequately exposed to that language. Despite these challenges, most studies are able to say at least two things: one, that students are not disadvantaged by bilingual schooling; and two, that student competence in the L2 is not high enough to use the language to learn content (see e.g. Williams 1998 on Malawi and Zambia). Some studies have found positive differences in test scores favoring bilingual schooling as mentioned above (CAL 2001), and a relatively recent study in Niger that tested bilingual and non-bilingual students in both L1 and L2 (Hovens 2002, 2003) clearly demonstrated that those who did best were bilingual students tested in the L1, while those who did least well were non-bilingual students tested in the L2.

Observational data confirm differences between bilingual and non-bilingual classrooms worldwide. In contrast to students in submersion programs who sit listening or reciting, bilingual students participate more often in the classroom and demonstrate greater self-confidence and higher motivation (ADAE, 1996; Dalby, 1985; Dutcher, 1995). The L1 allows children to express their full range of knowledge and experience and demonstrate their competence, which pedagogical approaches like those of Piaget and Vygotsky would support as productive for learning (Richardson 2001). Further, positive classroom affect is essential to good second language learning, as Krashen (1999) has established. Not coincidentally, bilingual programs tend to report lowered failure and dropout rates (Urzagaste 1999).

Another result of bilingual schooling that figures prominently in the literature is the newly awakened pride the community feels for its language and culture. Seeing the mother tongue in print in the official context of schooling elevates its status and usefulness in the eyes of both speakers and non-speakers.

In addition, the L1 brings cultural values into the classroom, which parents highly appreciate (d'Emilio 2001 on Bolivia; Benson 2001 on Mozambique). Increased parent participation. Another outcome of bilingual programs is increased parent participation in school affairs, a situation likely to be related to the fact that they are allowed to use the L1 to speak to the teacher. In Bolivia, d'Emilio found that given a "real opportunity to participate in decision-making about their children's schooling, parents no longer think speaking to teachers is a 'waste of time,' nor are they ashamed of using their native language in these meetings". Parent participation is a widely cited factor in successful bilingual programs (Cummins 2000; Dutcher 1995).

While the mechanisms remain to be explored, a number of studies (Benson 2002; Hovens 2003) have found that bilingual schooling has positive effects on girls' schooling in terms of higher enrolment and passing rates and lower dropout rates (see also CAL 2001). Benson (2002) proposes that both internal and external impediments to girls' participation may be eliminated by use of the L1, because increased student-teacher communication allows girls to demonstrate their competence and teachers to see it, and increased parent-teacher communication increases trust in the teacher while exposing him to more social control.

## CHAPTER 3: METHODOLOGY

Research methods in education (and the other social sciences) are often divided into two main types: quantitative and qualitative methods. This research has employed both qualitative and quantitative research methods. It has been stated that qualitative study should be carried out in a particular social setting where something actually happens (Maxwell, 2005). This study was carried out in Chilanga District. In terms of geographical position and distance from the Lusaka, the capital city, Chilanga District borders Lusaka and the administrative Centre is about 20km away. Since the researcher works in Chilanga as the Education Standards Officer – General Inspection (ESO-GI), the location was significant with regards to factors such as timing for fieldwork, funding and accessibility to respondents.

The purpose of the study and research questions influenced the choice of methodology. Three data collection methods were employed namely: Semi-Structured Interviews (SSI), Focus Group Discussions (FGD), and interview guide for district level officials from DEBS Chilanga. In addition, an analysis of official documents was done. As noted by Patton (2002), qualitative research methods facilitate the study of issues in depth and detail. Contrary to being constrained by predetermined categories of analysis, as it is the case with quantitative methodology, “approaching fieldwork with a sense of flexibility, contributes to the depth, openness and detail of qualitative inquiry which are key aspects of data quality” (Patton, 2002).

Some scholars prefer to minimize the conflict between behavior and meaning in social research by applying mixed methods as a way of maximizing the strengths of both methodologies (qualitative vs. quantitative) while minimizing their weaknesses (Polkinghorne, 2005). Since the intention was to explore the three complex assumptions and experiences underlining the gap between policy and practice in the selected district, qualitative approach was appropriate. One of the reasons for choosing this approach is that it allows a researcher to see through the eyes of the people being studied’ within a limited setting of the large context (Bryman, 2008).

A total of 52 teachers (24 males representing 46.2% of the respondents) and 28 females representing 53.8% of the respondents) completed the questionnaire interview. All of them were teaching lower primary school grades at the time the research was conducted. Purposeful sampling was used in order to identify and select information-rich individuals related to study. The use of SSIs was based on Patton’s (2002) view that qualitative interviewing provides the researcher with an opportunity to

assess the respondents' perspectives of their experiences, thoughts, knowledge, expectations and in some cases perceived changes as a result of their involvement or influence on a given program. Thus, SSIs provided the opportunity to probe further issues that needed clarification, but at the same time created space for flexibility for the researcher and informants. Although an interview guide was used, informants had the freedom to respond in any way they were comfortable with. As much as possible, SSIs of this kind demand substantial freedom on the part of respondents so that they are able to express themselves freely (Bryman, 2008:). Besides the flexibility to ask questions about issues raised by informants, questions were adjusted depending on the respondent's knowledge and experience with the indigenous language policy in Zambia. As much as possible, interview questions were open-ended, simple and direct, to ensure clarity. The interview questions were used to elicit views and experiences that are appropriate for the different respondent categories. Some of the questions were however crosscutting.

Key points were jotted down during the interview process and all interviews sessions were recorded through a Digital Voice Recorder. This minimized the degree of distraction on my part. At the end of each interview session, an interview audit was conducted to see if key points that came out during the interview session were effectively recorded.

Documentary analysis is one of the most frequently used procedures for collecting both primary and secondary data in qualitative research. Understandably, government ministries are a reliable source for both primary and secondary data usually kept in written form. In order to understand the historical background underlying the formulation of the indigenous language policy in Zambia, key policy documents were examined. Various documents from the MoE were accessed either as online copies or in hard copy form.

Since the aim of this study was to analyze the gap between policy and practice in the implementation of the indigenous language policy in Zambia, there was no way one was going to overlook key informants at district level since that is where policies are monitored. In addition, policy monitors are expected to know what is going on in the field. As a result, two key informants from DEBS Chilanga were sampled.

One FGD was held at the school level. A sample of eight parents and guardians were drawn to participate in the discussion. Through PTAs, parents and guardians have an opportunity to contribute not only through donations, but also by influencing decisions that affect the education of their

children. The inclusion of parents and guardians in the sampling frame is therefore justifiable since they are much closer to the primary beneficiaries at the grass root level.

Different factors influence the application of FGDs in qualitative research, and that is why the use of this data collection procedure tends to vary across different settings. There is no rule as to what number should constitute a focus group. Generally, “a group of this nature should comprise about 6 to 10 individuals sharing common background” (Patton, 2002). The strength of this technique lies in its diversity of perspectives created through participants’ interaction. Beyond that, participants can provide checks and balances on each other which weeds out erroneous and extreme views (Krueger & Casey, 2000). Despite these advantages, there are limitations as well. Once certain participants feel that their views are inferior or parallel to those of the majority, they may be inclined to withdraw in order to avoid negative reaction from other opponents. Drawing from human tendencies as ‘social animals’, FGDs can be enjoyable. This is due to the group effects of the real world given that, “a social actor does not exist in a vacuum, but with other people in society” (Patton, 2002).

Conducting FGDs demands considerable group process and interpersonal skills. Hence it was important to moderate group discussions so that no participant dominated the discussion to the extent that others felt they had nothing to say. By adopting a non-directional style, a variety of perceptions and viewpoints from all participants were encouraged. Further, a wide range of questions were discussed with a view to assess whether the views of national and district level respondents are different from those of the PTA members as far as the implementation of the policy is concerned.

Even if one had the means, it is not worthwhile to collect data from every individual in a given location since valid findings can still be secured even from a sample of a given population (Fink, 2000). However, this demands the application of appropriate sampling techniques such as convenient sampling, which will be used here. According to Bryman (2008), a convenient sample is one that is simply available to the researcher by virtue of its accessibility. Although there are limitations regarding the generalization of findings, “convenient sampling does play a critical role in qualitative research. Its strength lies in providing for the selection of ‘information rich’ cases of interest for in-depth analysis” (Bryman, 2008). Guided by the research questions, it was possible to figure out which and how many respondents will be interviewed from the targeted population. Since the samples will be drawn from three different respondent groups (national, district and schools), it will be possible to

triangulate certain responses on common questions, which in the end will improve the validity of the findings.

There are no such things as perfect research designs, but instead there are always trade-offs (Patton, 1990). Time was one of the major limiting factors in this study. Given the scope of the research topic, it took six weeks to pre-test the data collection tools and interview all the targeted respondents.

### ***3.1 Research Design***

This research was in the form of a case study. Case studies remain an important approach of qualitative research methodology. A case study can be defined as, “the detailed and intensive analysis of a single or multiple cases - which deals with the complexities and specific nature of a given case” (Bryman, 2008). It can also be understood as a method for investigating particular social phenomena within the context of its ‘lived-life’ (experienced) as contrasted with ‘unlived’ (un experienced) in which multiples techniques of gathering evidence are used (Yin, 1984). Critics nevertheless, argue that studying of a smaller number of cases hardly provides the basis for grounded reliability or generality of findings due to an individual’s exposure to biases. Nevertheless, case study approach can work provided a researcher engages in careful planning and systematic application of guiding principles in a real life setting. Indeed, case studies can illuminate on the investigation of the relationship between the subjects under study and their context (Bryman, 2008; Yin, 1984).

Practical considerations can involve confronting and resolving a wide range of other factors right in the field or shortly before which therefore, influences the direction of the study. In this research, a number of competing demands were faced. For instance, the budget has directly influenced the choice of the methods to ensure that data is collected in a cost-effective way. For instance, time consuming methods such as observations were avoided in order to reduce the cost.

### ***3.2 Data Processing Procedure***

Data collected from teachers using the designed questionnaire was analyzed using percentages. Bryman (2008) puts emphasis on the principle of protecting the anonymity of participants, which implies that confidentiality must be safeguarded in all instances of research communication, i.e. electronically, verbally or written. This also includes maintaining the anonymity of informants, and time and location where an individual was being interviewed. In line with Bryman’s assertion, names and other suggestive materials leading to the identification of informants were not collected.

## CHAPTER 4: DATA ANALYSIS AND FINDINGS

This chapter is devoted towards data analysis and discussion of key findings. The presentation unfolds with the analysis of the data themselves. Guided by the three themes of the study (i.e. teacher competence in local language, availability of appropriate learning and teaching materials, and stakeholder acceptance of choice of local language, data analysis goes into detail by examining the findings under each sub theme in relation to the research questions. The chapter ends with the discussion of the findings. The objective here is to try and interpret what the findings mean, not only in the narrow sense of answering the research questions, but also their implications on the wider assumptions about the implementation of the vernacular language educational policy in Zambia.

### 4.1 Teacher competence in local language

Questions pertaining to this theme looked at a number of issues. Chinyanja, which is the language of instruction in the Schools in Chilanga District is a mother tongue for only 18 or 34.6% of the teachers sampled.

Table 1 shows how the teachers rated their fluency in Chinyanja, which is the language of instruction in the schools in Chilanga District. When asked to rate their fluency in written Chinyanja, 24 (46.2%) indicated that they were very fluent, 12 (23%) said they were fluent while 16 (30.8%) said they were not fluent in the language of instruction. With regards to the spoken language, 30 (57%) said they were very fluent, 14 (26.9%) said they were fluent, while 8 (15.4) said they were not fluent. Clearly, there is a problem here because a teacher ought to be very fluent in the language of instruction for teaching to be effective.

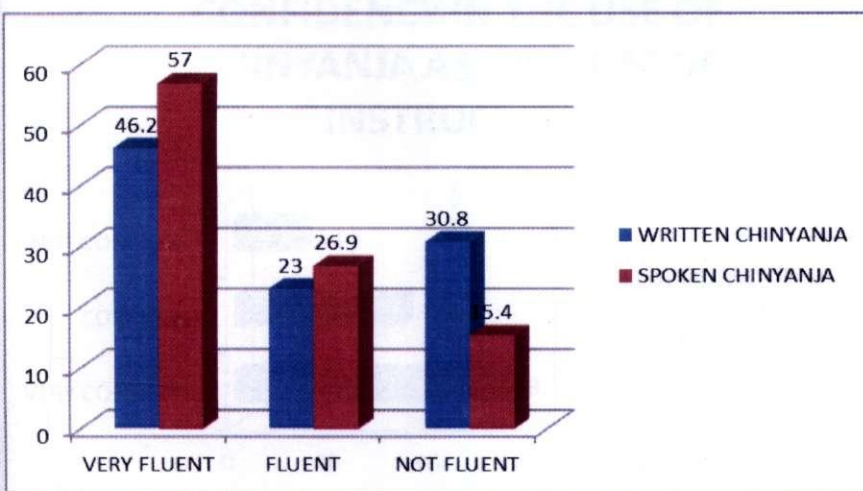


Figure 1 Fluency in Chinyanja (medium of instruction)

Figure 2 shows that only 18 or 34.6% of the teachers sampled were trained to use Chinyanja as a medium of instruction. This clearly poses a challenge to lesson delivery. Out of the 34 who have not been trained to use Chinyanja as a medium of instruction, 31 (91%) indicated that they required that kind of training.

### TRAINED TO USE CHINYANJA AS MEDIUM OF INSTRUCTION

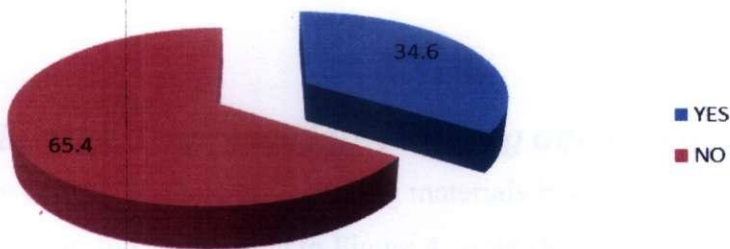


Figure 2: Number of teachers in Chinyanja as a medium of instruction

Figure 3 levels of confidence in the use of Chinyanja as a medium of instruction. As can be seen, only 18 teachers (53%) stated that they were very confident of using Chinyanja as a medium of instruction. 17 (13.5%) had no confidence at all.

### CONFIDENCY IN THE USE OF CHINYANJA AS MEDIUM OF INSTRUCTION

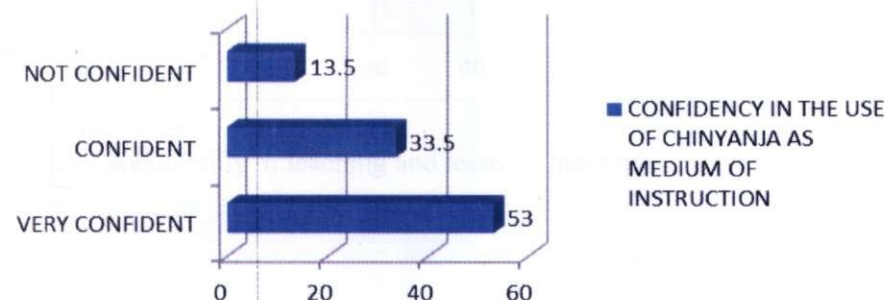


Figure 3: Confidence in the use of Chinyanja as medium of instruction

A simple survey by the Lusaka Star at some of the schools in Lusaka found that teachers are ready to implement the new policy but the problem they have is lack of necessary material to use. Therefore, the teachers are using their own understanding of the native language to teach the pupils. At one Primary School, there was only one book written in Chinyanja being used for the grade ones. For grades two to four, the books were not yet in causing a challenge for teachers. The major concerns of the teachers, however, are that despite the introduction of the use of the local languages in lower primary school as a means of instruction, many pupils can speak in their native languages fluently but have difficulties writing good grammar (Lupikisha, 2014).

## 4.2 Availability of appropriate learning and teaching materials

Availability of both learning and teaching materials in the local language is critical to effective teaching and learning. According to Figure 4, eight (8) 15.4% teachers indicated that they did not have teaching materials in Chinyanja. 14 (26.9%) Teachers indicated that they did not have learning materials in the language of instruction.

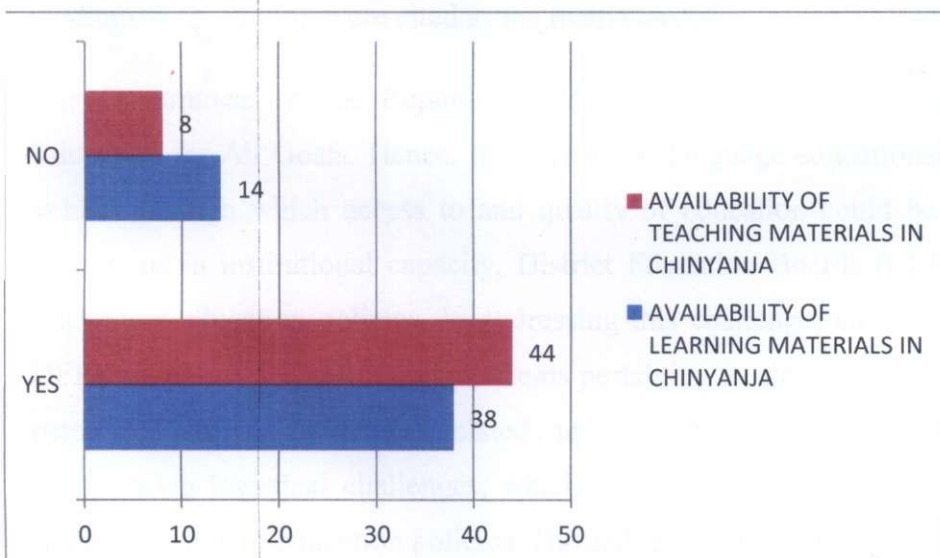


Figure 4: Availability of teaching and learning materials

### ***4.3. Stake-holder acceptance of Chinyanja as a medium of instruction***

Although stake holders (parents and guardians) were not directly asked to share their views on the use of Chinyanja as a medium of instruction in the schools attended by their children/wards, it is interesting to note that 18 or 34.6% of the teachers sampled indicated that they encountered parents who had misgivings about the use of Chinyanja as a medium of instruction in the lower grades at their school.

### ***4.4 Capacity to monitor policy implementation***

“Scholars of policy implementation repeatedly argue that implementation problems should be considered when policies are being made. Better policies would result, we are told, if policy makers think about ahead of time whether and how their policies would be implemented before they settle on particular course of action” (Elmore, 1980).

Elmore seems to be spot on in highlighting how thoughts of forward mapping provide useful insights on policy and practice. Although all the teachers sampled were aware of this education policy, 48 (92.3%) were not satisfied with the way it was being implemented. Inadequate learning and teaching materials in the local language, language barrier and lack of orientation or training in Chinyanja as a medium of instruction were cited as the main constraints to the implementation of the policy.

The Government of the Republic of Zambia (GRZ) is fully committed towards achieving the Education for All Goals. Hence, the vernacular language educational policy under MoE is seen as a vehicle through which access to and quality of education could be improved. Notwithstanding the limitations in institutional capacity, District Education Boards (DEBs) were established in order to implement education policies. In addressing this challenge, GRZ made attempts towards enhancing DEBs’s capacity by addressing problems pertaining to planning and financial management, including personnel and infrastructural related needs (MoE, 2003). Unfortunately, the Chilanga DEBs is experiencing logistical challenges, which make it difficult for the office to effectively monitor the implementation of education policies. The office has one vehicle, which has to be shared among all the officers in addition to undertaking day-to-day administrative duties.

It was clear from the interview with both the DRCC and Assistant DRCC that officials at DEBS office were very conversant with this policy. Both interviewees participated in the initial training and pilot

program to introduce local languages as medium of instruction in the lower primary schools. Both indicated that their role was to monitor policy implementation and provide professional support in terms of capacity building programs for teachers. Policy monitoring is supposed to take place at every level i.e. district, zone and school. This is being undertaken through assessments and competent tests. The DEBS office has partnered with many organizations interested in the implementation of this policy such as the USAID-funded Room to Read and Pedagogy in the provision of literacy materials.

The policy has not had much impact on the ground as can be from the results of the National Competency Tests for Grade one and two, which are not very good throughout the country. A number of challenges to the effective implementation of the policy were highlighted. Zambia is a multi-language nation. If a teacher whose mother tongue is cibemba is sent to a silozi speaking region, he or she will spend much of his or her time trying to learn silozi. The children of this teacher will also be affected because they will be made to attend lessons taught in silozi, which is not their mother tongue or home language.

The country has very few writers of literacy material in local language. This has resulted in a shortage of such materials. Language dynamism is also a challenge on its own. The cinyanja spoken in Lusaka for example is to some extent different from the cinyanja in textbooks. A table in chinyanja is “Gome” yet in the language of play we have localized it to “Tebulo”. This can be very confusing to a child in the sense that they won’t know which term to use leading to non-achievement of learning objectives.

## **CHAPTER 5: SUMMARY, CONCLUSION AND RECOMMENDATIONS**

This chapter sums up the main issues discussed in this thesis. It provides a summary and conclusions based on data analysis and discussion of main findings in chapter 4. The last part outlines recommendations and the way forward.

### ***5.1 Summing up***

The overall goal of this study was to analyse vernacular language education policy in Zambia in terms of the perceived gap between policy and practice or implementation. In particular, three factors thus; teacher confidence in the use of local language as a medium of instruction, availability of teaching and learning materials in the local language, and stake-holder acceptance of choice of language of instruction, were examined in order to see how they affect implementation of the policy. The study took the form of a quantitative case study of Chilanga District Education Boards (DEBs). Guided by the aim of the study in chapter one, this thesis sought to answer three key research questions namely:

- Are teachers allocated to teach lower primary school grades competent in the use of the local language as a medium of instruction?
- Are learning and teaching materials written in the local language readily available and in sufficient quantity for use in the lower primary schools?
- Have all stakeholders (parents and guardians of children in the lower primary schools) accepted the use of the local language chosen by the Zambian government as a medium of instruction in those schools?

The initial build up to these questions is chapter 2, which provides a contextual background on the genesis of LiE policy. The chapter highlights a number of issues of which the key ones are the policy objectives. The chapter shades more light on the benefits of using vernacular as a medium of instruction in lower primary school grades. The substantial limitations of the policy were highlighted. This critique was explored further in chapter 4. Essentially, the literature review identified and discussed the advantages of this policy if well implemented.

## ***5.2 Conclusions of key Findings***

The study revealed that the LiE policy implementation is hampered by incompetency in the use local language by some teachers, misgivings over the choice of local language by some stake holders and to some extent the non-availability of teaching and learning materials at some schools. The study also revealed that although the DEBs office is tasked with the responsibility of monitoring policy implementation, it has limited capacity to do so. This is largely because of inadequate transport to undertake this important task. It was gratifying however to discover that teachers and members of staff at the DEBs office are conversant with the policy.

## ***5.3 Recommendations***

The following measures are being recommended to ensure effective implementation of the LiE policy in Zambia.

- Implemented of the LiE policy should be phased, i.e. schools should be considered “traditional,” “in transformation” or “under the reform” depending on the degree to which teacher training has taken place and materials had been distributed. Even trained teachers have traditionally had few opportunities to become proficient in the L1 in written form or the L2 in spoken form, so these skills require further development through instruction and practice.
- In order to meet acute personnel needs, the Zambian government should consider providing indigenous youths with secondary schooling along with L2 skills and pedagogical training, thereby preparing them to be bilingual teachers in their own communities. Another measure is to pay financial incentives for teachers working in bilingual classrooms and in remote areas.
- Since this study was only conducted in one district, widening the geographical scope by covering more districts and schools may in future provide in-depth insights, which would add to the existing body of knowledge on experiences regarding the implementation of the vernacular language education policy. On the other hand, since this study employed a case study design involving smaller sample of respondents, further investigation with mixed method with relatively larger sample may be necessary for achieving a much firmer basis for making policy recommendations.

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## **Appendix A: District Level Interview Guides**

### **Background information and general questions**

1. Male/female; Academic qualifications; current designation
2. Duration of service and work experience related to the policy regarding the use of local languages as medium of instruction in lower primary schools in Zambia.
3. What precisely does the policy say about the use of local languages as medium of instruction in lower primary schools in Zambia?
4. What main challenges does the policy seek to address in the education sector?
5. What is the role of DEBs with regards to this policy?
6. What measures have been put in place to ensure good implementation of the policy?
7. What are the challenges (if any) affecting the implementation of this policy?
8. What practical lessons have you learnt that can help to bridge the gap (if any) between this Language in Education policy and practice?
9. Do you have any other comments on the implementation of this policy?

## APPENDIX B: Teachers Questionnaire

### QUESTIONNAIRE FOR TEACHERS

OFFICIAL USE

Survey date \_\_\_\_\_

School \_\_\_\_\_

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**ZIMBABWE OPEN UNIVERSITY AND THE UNIVERSITY OF ZAMBIA  
INSTITUTE OF DISTANCE EDUCATION COLLABORATION PROGRAMME  
MASTER OF EDUCATION IN EDUCATIONAL MANAGEMENT**

**ASSESSMENT OF THE IMPLEMENTATION OF THE LANGUAGE POLICY OF USING  
CHINYANJA AS THE MEDIUM OF INSTRUCTION IN LOWER PRIMARY SCHOOLS IN  
CHILANGA DISTRICT EDUCATION BOARD.**

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#### **Purpose of the Study**

**The purpose of the study is to provide a critical analysis of the Indigenous Language Policy implementation process and its challenges in line with stakeholder concerns on its practicality in Zambia.**

#### **Procedures**

*You are being asked to participate in a survey that will take between 20 and 30 minutes. Your answers will not be viewed by any of your superiors, colleagues or supervisors and will not in any way affect your job. The answers will be seen only by the researchers, who are not affiliated with your school, and will be treated with confidentiality. Further, although your school administration and the Ministry of General Education have authorized this study, they will not have access to your individual responses. To ensure anonymity of your responses, your name will not appear on the interview record or any other documents related to this survey.*

*You will be asked about your opinions, experiences and practices with regards to the implementation of the language policy of using chinyanja as the medium of instruction in lower primary schools in Chilanga District.*

#### **Right to Refuse**

*Your participation in this research is voluntary. If you do choose to participate, you will be asked to sign a consent form. You are free to ask questions before signing this form. If you have questions during the course of the study, you may contact the following:*

*Lucy Chipeta, Chilanga DEBS Office, Tel: 0977866924*

**INTRODUCTION**

Thank you for agreeing to complete this questionnaire. Please follow the instructions carefully and answer every question that applies to you. We appreciate your cooperation and time.

What was your age on your last birthday?

What is your sex? (Tick  $\checkmark$  one)      Male                       Female

What is the highest level of education you have completed? (Tick  $\checkmark$  one)

College                       University

Which grades are you teaching? (Tick  $\checkmark$  one)      Pre-school                       Lower Primary

Chinyanja your mother tongue? (Tick  $\checkmark$  one)      Yes                       No

What is your level of fluency in Chinyanja? (Tick  $\checkmark$  one)

	VERY FLUENT	FLUENT	NOT FLUENT
WRITTEN			
SPOKEN			

How long have you been teaching?                      ..... Years  
(year or less, write 1 year)

Do you know about the National Language Policy of using vernacular as a medium of instruction in lower Primary Schools in Zambia? (Tick  $\checkmark$  one)

Yes                       NO

8. Have you received any training that prepares you to use Chinyanja as a medium of instruction in your teaching?

(Tick  $\surd$  one)

Yes

NO

9. If the answer to question 8 above is NO, do you think that you require this kind of training? (Tick  $\surd$  one)

Yes

NO

10. Do you have teaching materials written in Chinyanja? (Tick  $\surd$  one)

Yes

NO

11. Do you have learning materials written in Chinyanja? (Tick  $\surd$  one)

Yes

NO

12. How confident are you with the use of Chinyanja as a medium of instruction in your teaching? (Tick  $\surd$  one)

Very confident

Fairly confident

Not too confident

13. Are you satisfied with the way this language policy is being implemented?

Yes

NO

14. If your answer to question 13 above is No, what are some of the constraints to the implementation of this policy?

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15. Have you had any stakeholders e.g. parents express misgivings over this policy?

Yes

NO