Editorial

Vážené čtenářky, vážení čtenáři,

s radostí a pocitem dobře vykonané práce vám představuji nové číslo CASALC Review, tentokrát připravené odborným týmem Centra jazykového vzdělávání Masarykovy univerzity. Oslovili jsme inspirativní učitele, učitele učitelů a metodiky, s nimiž má toto pracoviště to potěšení a čest spolupracovat či jinak vstupovat do interakce, a s jejich přispěním i s přispěním našich vlastních pracovníků jsme pro vás připravili lákavé čtení o inovativních přístupech ve výukovém dění na univerzitních jazykových centrech z rozličných koutů světa. V textech snad vysledujete určitou tematickou progresi od soft skills přes čistě odborný jazyk a videokonfereční výuku směrem k systémovým otázkám, s nimiž je univerzitní jazykové pracoviště konfrontováno.

Číslo otevíráme článkem o interdisciplinaritě v jazykovém vzdělávání v Portugalsku, následně se noříme hlouběji do oblasti měkkých dovedností: emoční inteligence a rozličných osobn(ostn)ích prvků, jež vstupují do interkulturní komunikace. Mezitím nám kolegové angličtináři z Itálie předestřou další možný přístup ke kreativnímu vyučování, kolegyně ruštinářka z CJV MU vysvětlí, jak do výuky aplikuje teorii hry. Následuje dvojí velmi odborné zasvěcení do lékařské latiny a lékařské terminologie obecně, poté se přesuneme k terminologii právnické. Od ní je to jen krok k odborné angličtině pro studenty ekonomických věd vyučované videokonferenčně na univerzitě v Paderbornu. U videokonferencí a cross-kulturních dovedností, které se jejich prostřednictvím rozvíjejí, se ještě zdržíme s kolegy z Pardubic a Uppsaly (Švédsko). S kolegyněmi z Helsinek a kolegyní z Birminghamu pak vstupujeme do oblasti řešení systémových záležitostí jazykových center, ať už se jedná o nastavení designu kurzů, motivování učitelů k výzkumu či o kontrolu kvality, již aktuálně intenzivně řeší pracoviště Masarykovy univerzity v Brně. Číslo uzavírají dva články zasvěcené testování – první představuje validační proces španělské zkoušky eLade optikou autorského týmu, druhý se věnuje problematice skórování v jazykových testech z angličtiny u českých maturit.

Poutavé a inspirativní čtení vám jménem CJV MU přeje

Kateřina Sedláčková

Obsah

Psychological and creative approaches to language teaching

Crossing Disciplines: Interdisciplinary Practice in Higher Education

María del Carmen Arau Ribeiro

Abstract: In this article on interdisciplinary higher education with a view to English language learning, specific education benefits are revealed, ranging from critical thinking skills and the toleration of ambiguity to the recognition of bias and the appreciation of ethical concerns. In the Bologna-inspired environment of higher education aimed at the workplace, language centres are uniquely poised to promote an interdisciplinary approach to better serve student needs. In the author's experience over two decades in Portuguese higher education, increased student interest, dedication, and enjoyment in interdisciplinary activities demonstrate the applicability of this proactive enhancement of competences where the target language is the medium of communication. Modelling the synergistic nature of the learning process exercising various knowledge systems, Best Practice is described for crossing disciplines by selecting materials, understanding their application and dealing with assessment.

Resumen: En ambientes de educación superior orientada hacia el desarrollo profesional, los centros de lenguas, sobre todo lenguas para fines específicos y CLIL, deberían fomentar un enfoque interdisciplinario. La creación de sinergias en el proceso de aprendizaje, donde la interacción de varios sistemas cognitivos es una constante, resulta en el enriquecimiento proactivo de competencias.

Abstrakt: Tento článek se zabývá mezioborovým vyšším vzděláváním při studiu angličtiny a ukazuje jeho výhody, od schopnosti kritického myšlení a tolerance dvojznačnosti až po rozpoznání předsudků a ocenění zájmu o etické problémy. Ve vyšším vzdělávání inspirovaném Boloňským procesem jsou jazyková centra jedinečně připravena podporovat především mezioborový přístup, aby lépe sloužila potřebám studentů. Podle autorčiných dlouholetých zkušeností z portugalského vyššího vzdělávání způsob výuky, kdy je cílový jazyk prostředkem komunikace, proaktivně zvyšuje kompetence studentů a jeho použitelnost je doložena zvýšeným zájem studentů, nadšením a radostí z mezioborových aktivit. Nejlepší metoda prolínání oborů napodobuje synergickou povahu učebního procesu uplatněním různých systémů vědění a je charakterizována výběrem materiálů, pochopením jejich aplikace a řešením problémů s stestováním.

Introduction

Having witnessed the inspiration of interdisciplinary studies in Science and the Humanities in the *opera magna* such as Needham's *Science and Civilisation in China*, published between 1954 and 2008, and Proust's *À la recherche du temps perdu*, released over 14 years beginning in 1913, academia now boasts reputable examples of interdisciplinary higher education at Duke, the Institut Nicod/Interdisciplines in Paris and the University of Southampton's College for Interdisciplinary Learning, to name but a few, thus contributing to the 'the literature on cognition and instruction

[which] shows that interdisciplinary learning promotes higher order cognitive abilities' (Repko 2008: 176).

In a recent example, Yale and the National University of Singapore (NUS) commenced their joint venture as Yale-NUS College, an institution of liberal arts with an emphasis on exploring cultural differences and moving beyond rote learning and lectures. Breaking with Asian tradition, and pushing the socio-political limits of Singapore itself, in September 2013, students were exposed to a teaching strategy that asked them not only to engage in controversial classroom discussions and participate in small group seminars for each course but also to communicate beyond the classroom using Web 2.0 tools (Fischer 2013). Due to the ambiguous nature of communicating across disciplines and the recognition of the multiple intelligences involved (cf. Tait & Lyall 2007; Boix Mansilla & Gardner 2003), the school expects the students to spend more time on interdisciplinary work.

Within the European Higher Education Area, the Bologna Agreement and its effect on higher education has been explored and measured extensively for teacher training purposes and especially for languages and culture (cf. Arau Ribeiro, Brito & Árias Mendez 2008; Rodrigues, Arau Ribeiro & Brito 2015). Preparation for the professional world further validates collaborative practice through improved interdisciplinary work in higher education, despite the difficulties that may be encountered (cf. Mantilla 2009). ERASMUS+ programmes have further contributed to the crossing of borders to provide more diverse linguistic and intercultural competences, as attested by the Language Rich Europe study, among others (cf. Extra & Yağmur 2012).

Thus, for the myriad reasons presented, regular exposure to interdisciplinary modules that deal with real-world problems has been the option for this English teacher in Portuguese higher education. This article, which is practical in nature, describes the key concepts involved in interdisciplinary practice for learning English, including a presentation of the creation of communities of practice to carry out interdisciplinary activities with appropriate scaffolding by fellow students and the teacher. The three examples of interdisciplinary practice, involving students of Communication, Business, Computer Science and Tourism, are accompanied by practical teaching tips for not only interdisciplinary work but also quality teaching in general.

Key concepts defined

A comparison of terminology used for related approaches and their respective actions demonstrates that a *multidisciplinary* approach reflects simultaneous activity in the two distinct areas while a *transdisciplinary* approach reflects transcendence of boundaries. Finally, an *interdisciplinary* approach would be one that reflects synthesis of the two areas (Salmons & Wilson 2009; Teinaki 2011). Correspondingly, in recognizing synthesis above transcendence, the US National Academy of Sciences proposes interdisciplinary research (IDR) as the umbrella term, which includes transdis-

ciplinary research as a subset. Specifically, IDR is considered to be a mode of research by teams or individuals integrating

> 'information, data, techniques, tools, perspectives, concepts, and/or theories from two or more disciplines or bodies of specialized knowledge to advance fundamental understanding or to solve problems whose solutions are beyond the scope of a single discipline or area of research practice'. (National Academy of Science, National Academy of Engineering, Institute of Medicine 2005: 188)

This article takes the broadly accepted definition of interdisciplinary education as

> '[t]he capacity to integrate knowledge and modes of thinking in two or more disciplines or established areas of expertise to produce a cognitive advancement – such as explaining a phenomenon, solving a problem, or creating a product'. (Boix Mansilla & Duraisingh 2007: 219)

In this sense, the interdisciplinary approach for maximum English language learning involves not just one but two applied subject areas in a proactive enhancement of the target language.

Contextualizing interdisciplinary practice

Within the classroom, the Community of Practice (Wenger 1998) describes a specific "approach to knowing and learning" where the teacher and students proactively build the learning environment. Through a coherent community of practice, students learn to rely on this forum, with a consistently supportive environment, to "share a concern or a passion for something they do and learn how to do it better as they interact regularly". This is not only a supportive context but also a construct that requires constant maintenance in which, learning from each other in previously unfamiliar areas, the students necessarily cultivate a high tolerance for ambiguity (cf. Tait & Lyall 2007).

The inclusion of global and local citizenship practices enables students to develop their knowledge/practice, via intervention and action research, to promote the common good. By applying proposed solutions to societal concerns such as equality, sustainable development, new technologies, health, poverty and/or migration, students and teachers alike can participate in the real problems of the world.

Scaffolding, the support that is progressively reduced as the language user builds a stronger foundation, finds an appropriate setting in a community of practice. The rich tradition of both cognitive and socio constructivist learning theory meet in the community of practice, where future autonomy in the foreign language is a plausible objective. Teachers who aim to scaffold within a community of practice will assume responsibility for creating sustainable learning environments that are visual, oral and kinetic. Correspondingly, the students who strive to acquire language competencies are responsible for manipulating, reconsidering, reviewing, thinking, presenting

and justifying ideas as well as stretching concepts and articulating notions within dynamic activities and topics that the teacher has crafted in advance.

Methods and procedures

Effectively introducing interdisciplinary practice requires a motivating objective and related activities as well as appropriate materials that are both timely and significant. Then, to justify working other subjects into the English or ESP syllabus, the interdisciplinary approach is supported by the European key competences for lifelong learning, which include, among other skill areas, learning to learn, Mathematics and basic science & technology, ICT competence, a sense of initiative and entrepreneurship, social and civic competences as well as cultural awareness and expression. This plethora of skills means that any crossovers will promote more than one competence area and contribute to overall student competence.

Having found a given objective for an interdisciplinary activity, the proposal can be framed by accentuating the multiple functions in orientation questions (Wenger--Trayner & Wenger-Trayner 2015). Their useful and inspiring suggestions cover problem solving and reusing assets as well as programming virtual visits and requesting information. Students can also simulate ways to gain experience and discuss the developments of any situation that has been posited. Finally, they can improve their efforts at group coordination and creating synergies, map many types of knowledge and even identify gaps through relevant and inspiring opportunities to practice language within interdisciplinary studies.

Assessment provides a valuable source of information for both the students and teachers involved, especially those looking to make constant improvements and fine--tune the interdisciplinary approach from activity to activity. Some researchers (cf. Vars 2002: 69) advocate using a simple comparison of entrance and exit surveys to save time, which may initially be more valuable for preparation. Nevertheless, for each of the three interdisciplinary modules to be presented, student keep self--assessment memos, written before and after, based on the following sequence of questions adapted from Repko (2008: 174).

1. What perspectives can you identify to consider these problems? After the activity, what other perspectives did you consider?

2. What do you know specifically that will make it possible to solve the various problems? After the activity, what else have you learned that will make your solutions to the various problems more multidimensional?

3. What do your colleagues in (the other area) know about (the topic)? What can you learn from them? After the activity, what did you learn from them?

The final assessment point, the production of an interdisciplinary understanding of a complex problem or intellectual question, was reflected in the tangible results of the interdisciplinary activity.

The interdisciplinary approach in practice

Three examples demonstrate interdisciplinary modules in action. Communication & Public Relations and Executive Secretarial Studies students were asked to work together to promote a cultural event, a nation-wide encounter sponsored by the British Council during the Language Rich Europe project. These students, despite initial rejection of their counterparts (the PRs especially spurned the future secretaries due to the perception that they are hierarchically less relevant) collaborated, learning from each other to gain competencies in communication and organization, and to discover more information about the speakers by gathering data and bionotes. They practiced their abilities to distinguish between reliable and other sites and sources of information as well as building promotional material, like posters, programmes and fliers, using their ICT skills and practicing constructive criticism and team work. Finally, because they were given full responsibility on campus, they immersed themselves in preparation for proper etiquette and protocol in working with distinguished guests, leading to rigorous research and stimulating debates. A clear benefit was that students broke with their initial social bias against secretaries when faced with the skills acquired from their multidisciplinary preparation, as early as the first year of university.

At the School of Tourism, Hotel Management students in collaboration with the Catering course designed and presented their ideas for communication processes to reduce loss in food spoilage and/or to better control exposure to potential food allergies. The more holistic view of the future hotel managers initially seemed to be a barrier to communication with the detailed perspective of the Catering students, focusing on the specific area of Food & Beverage. Nevertheless, the common goal of caring for their guests helped to overcome any barriers. The recourse to technology that was needed to create an appropriate communication process required both IT and written communication skills, areas in which both courses had to improve.

In an interdisciplinary activity pairing Marketing and Computer Science students, the topic was Customer Relations Management (CRM). At the time, it was a relatively new concept and Marketing professionals would need IT support to learn about their clients' habits, preferences and demographics. In clearly defined modules, the two classes respectively discovered the various aspects of CRM and data bases. In the following class jointly taught with the Computer Science teacher, the students from these two areas met in designated pairs to first teach each other about their respective know-how and then produce appropriate databases to collect the information identified as relevant for the study of a particular company or product. They reported on the challenge of making your own specialty understandable to people from other

areas, especially in the case of the Computer Science students, who were surprised to find that the specific terminology and discourse used to talk about databases, for example, made communication difficult. To meet this challenge, they looked for other expressions and used more accessible language. The Marketing students discovered that using a computer program is not at all the same as creating one; they practiced expressing their needs the data to be collected more objectively and through practical descriptions. In the end, students were particularly proud of having learned to value the other study area and for what might be expected in their future professional activity.

In each of these three examples, assessment had a subjective and an objective dimension. On the one hand, the students together "produced" an event, a database or an idea, which was evaluated objectively for its worth in the specialty area. On the other hand, in oral feedback and in written assessment for their portfolios, both before and after the interdisciplinary module, students responded in Repko's (2008) four areas, as previously cited, keenly sharing their perceived acquisition of competencies and their pleasant surprise with the multiple ways in which they felt they had grown.

Discussion of best practices for interdisciplinary activities

A number of suggestions from a linguistic and didactic perspective are well taken for this absorbing approach. In contrast with traditional classroom activity, interdisciplinary work gives students from different areas the opportunity to work together on relevant and attractive professional topics. Although eventually met with enthusiasm, rejection in the face of change is both common and predictable. The teacher's confidence and interest can impact this initial reaction and influence a positive change.

Teachers who train themselves regularly to be behavioural experts know the importance of listening carefully and respecting the pace of the classroom. Their ability to identify timely and significant topics clearly influences the students' immediate and medium-term reaction and enthusiasm. Clues for appropriate topics can be identified within a community of practice, where barriers to interaction are at a minimum and where students and teachers alike can express their interests and motivations. The selection and proposal of challenging crossroads makes learning possible for a greater number of students since there are several possible angles involved and a greater diversity of strengths to be applied. The language level of the material also determines whether it will be approachable based on prior knowledge, another key strength of successful scaffolding.

Understanding the interconnectedness of language and culture (Arau Ribeiro 2009), will ensure the inclusion of both 'high' and 'low' culture and a regular enhancement of intercultural knowledge, especially via pragmatics. Note that working with Hofstede's controversial cultural dimensions and considerations for intercultural strategy

and for promoting change leads to disagreement that can stimulate passionate debate.

Learning more about semiotics enables language teachers to orient students as they make fuller use of images and visual representation to prepare their reports or presentations. However, since many language teachers are from the areas of Letters and the Humanities, their respective levels of knowledge in the pure sciences may be lagging or even lacking. Getting informed, especially in a new area, can be daunting; nevertheless, interesting topics abound and, as teachers, who better to be engaged in lifelong learning? Given that many teachers come to the profession not only because of a vocation but also for their joy of learning, reading and watching documentaries in new areas will be a pleasant challenge (cf. AS-APscience at http://asapscience.tumblr.com/). Even the *Arts & Letters Daily* site (http://www.aldaily.com/), which formerly used the slogan 'Food for the mind', offers a veritable smorgasbord of culled treasures from the finest journalists and often bridges the gap to the sciences.

Including ICT (or simply IT) in activities with students is essential since contemporary employment competencies include computer skills and English. Given that, the first ever EU *Digital Action Day* was celebrated in Brussels on 29 September 2015, honouring 'Every European Digital, Every Sector Digital'. Thus, despite the conflicting tendency, online research *in class* can be actively encouraged and validated, making those erstwhile annoying mobile devices valuable teaching tools rather than distractions.

Some of the key objectives that can motivate the relentless drive to create these relevant projects with students begin with the letter E: entertain, engage, enthuse, inspired by the widespread alternative meaning of the E in the acronym for TEDtalks – *Edutainment*. Other positive activities for promoting solid pedagogy include the objectives to *exchange, empower, extend, enhance* and *enrich*, for example, in the area of ICT, given the prefix in *e-learning* (cf. NAACE 2007: 10).

Conclusions

In working with an interdisciplinary approach, a number of inherent dangers may arise. Although the foreign language class taught interdisciplinarily may be perceived as a "threat" to subject teachers, the principal aim is a palette of relevancy within which to practice communication. As seen in the three cases presented, the more involvement the students have with other skill set areas, the more optimum participation can be expected in their professional and personal future. The traditional learning setting, based on the segregation of study areas, makes interdisciplinary practice especially attractive to students who know very little about other areas and are curious to learn more from each other through this interaction. Students found

their interdisciplinary practice in English fruitful and worthwhile but the agility of the teacher is constant and the preparation time required is significant.

Most of all, in the attempt to make learning both interesting and appealing, teachers will need to remain humble and open to learning, particularly since interdisciplinary studies imply working across other domains. Students may actually know more than the teacher, be it in terms of form, function, meaning or context, which serves very clearly to reinforce the sense of *community* in the Community of Practice, one in which everyone learns.

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Bionote

María del Carmen Arau Ribeiro, e-mail: mdc1792@gmail.com, School of Management & Technology, Polytechnic Institute of Guarda, Portugal.
ReCLes.pt President and IPG Interactive Centre for Language & Culture Coordinator with publications in teacher training, learning strategies, metacognition, interculturality and CLIL.

Emotional Intelligence in Foreign Language Acquisition

Eva Trumpešová-Rudolfová

Abstract: This article aims to touch upon areas of emotional intelligence connected to foreign language acquisition. It is going to frame out the areas that are crucial for everyday human interactions and that can be used fruitfully for foreign language learning. As people need to communicate and their uttermost need is to connect with other people, it becomes necessary to be able to navigate one's own behaviour through the lands of others. Emotional intelligence helps people to be guided through the web of human relations and to understand their own feelings as well as those of others. Undemanding as it might sound, this is in reality very laborious, even in a native language, let alone in a foreign one. However, mastering emotional intelligence in a foreign language can serve as a facilitating element as well as a progress marker, as it represents the threshold dividing a mediocre user from a fluent and natural one. It opens the gate to a much higher level of knowledge; to a much higher level of learning, living and being. After first giving an overview of the topic, this paper therefore discusses the incorporation of certain elements of emotional intelligence into a language classroom to boost learning and results.

Key words: emotional intelligence, foreign language acquisition, education, learning

Abstrakt: Článek se věnuje oblasti emoční intelligence jako nástroje pro efektivnější osvojení si cizího jazyka. Hovoří o začlenění několika vybraných prvků emoční inteligence do výuky jazyků za účelem podpory procesu učení jako takového a lepšího si osvojení cizího jazyka.

Introduction

Every single person in the world has done some formal or informal learning. This could lead to the conclusion that there would be many experts devoting their professional zeal to the field of learning and, most importantly, that most people could be instructed on how to make their learning more efficient in institutions set up to serve this purpose. This is hardly the case, as Singapore is most probably the only country so far that requires every pupil and student to go through Social and Emotional Learning Programme[1]. As a result of this, most students are left with the advice of their parents, teachers and peers, who very rarely elaborate on how to approach learning; instead they concentrate on the content of learning. As a consequence, pupils and students may encounter many misconceptions, such as the belief that academic success depends on talent, or that current skills of an individual should be taken at face value (therefore it is often accepted practice in elementary schooling to provide children at a very early age with labels as to their academic competence, following the presumption that this is rather stable and difficult to overturn.) Instead

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[1] see http://www.moe.gov.sg

of being shown different, more personalized ways (based for example on Gardner's Multiple Intelligences) to enhance their skills, it is conveyed to them to not expect much in their careers. Children and their parents alike have a tendency to believe these prophecies as they come from professionals, people who are trained to detect the shortcomings in their students. These prophecies frequently become self--fulfilling as research shows that if teacher believes his students will fail, they are more likely to do so and vice versa (Rosenthal, 1992).

However, a growing number of scientists and authors (Gardner, Robinson, Damasio, Goleman and others) start to point at this phenomenon and work towards directing the attention of educators towards emotional intelligence, social intelligence, learning skills, reflective practices and life skills as part of the education process. They argue that looking at students from a traditional IQ-based perspective and assuming that their skills and 'talents' cannot change with time is no longer valid. That by promoting and practising the emotionally intelligent approach among students, parents and educators, the potential to bring a change in this attitude emerges. Students, led by their thus enlightened teachers, can decide to challenge the educational perspective they were given as children, based on the assessment of their verbal, logical and mathematical performance. They are given the power to regard this perspective as a temporary state, depending on their own decisions how to handle it. 'I cannot do it because I am not good at it, my teacher told me' changes into 'I need to find a way that will suit my needs and my inner settings, which will enable me to master this field.' In the classroom, it is very useful to link this emotionally intelligent approach with the 4C's approach (Communication, Cooperation, Critical Thinking and Creativity) as critically reviewing one's own position, discussing it with others and co-operating with others on a creative solution suitable to one's own needs is crucial to a successful change.

This procedure is valid across academic disciplines; however, this paper concentrates on foreign language acquisition, in particular within groups of students who do not study English (or other languages) as their main subject. In particular, students of ESP and EAP classes as well as participants in different support groups of English Autonomously at Masaryk University. These students are very likely to either have difficulties with the language (it is precisely why they have selected a different field) or with motivation (they might not consider it a priority). It is the task of the teacher then, to propose strategies that will enhance their learning, analyse and redirect their motivation and assist them at mastering the foreign language. In this case, the techniques of emotional intelligence allow for potential exponential growth. Because when students are learning a new language, they can learn it from scratch, put new corner stones, learn vocabulary connected to emotions, and as a bonus become more aware of them. By trying various sorts of self-reflection exercises in the target language, students get a boost in both emotional intelligence and language acquisition. It becomes a self-feeding circle.

Background of Learners

Followed by discussions with students as well as teachers, it appeared that students at Masaryk University might benefit from the introduction of emotional intelligence into their foreign language classes. A trial run was carried out during one semester.

For the purpose of this practice, certain elements of emotional intelligence were selected and applied throughout both the regular and modular lessons, and also in language counselling, with the aim of raising the awareness of emotional intelligence among the students and practically trying out activities to make foreign language acquisition more effective. At the same time, the expectations was that the students would become more emotionally intelligent as a bonus.

The activities used in the classroom strove to constantly challenge students' learning and their assumptions in terms of emotional and social intelligence. Sometimes, it required the teacher to assist them and teach them what skills in particular might help each of them individually to become a better learner in the careers they wanted to pursue in their lives. This is in line with the approach of showing the students how to be transformed from the person studying for the exams to a lifelong learner (Hazzlewood in Honoré, 2008).

The students needed to be explained the existence of the comfort zone and how no learning happens within that zone. Frequently, the teacher was facing the challenge that the activities and exercises the students would benefit most from were those that they were least willing to try. There, their understanding of the situation as such (not necessarily the aim of the activity at this point) was crucial, including its benefits and pitfalls. By bringing their awareness to their feelings and by placing themselves in the comfort/learning/panic zone circles (below), they were provided with a tool to work with in their (future) learning.

Their feelings towards the matter in hand helped them distinguish between what was feasible and what was not. That is why feelings are important, why 'taking the emotional temperature' (Goleman, 2000) can be crucial.

It follows from my own personal experience that, paradoxically, in order to accept what they are being taught, the students already require a certain level of emotional intelligence, to be able to admit that this could be beneficial to them.

To deal with the issues described above, it was discovered that when the teacher asked the students various controversial or seemingly unrelated questions in a rhetorical way, or included self-reflection exercises as warm-up activities for lessons hoping for the seed-plant analogy and cumulative effects of such practice, it was the right direction to follow.

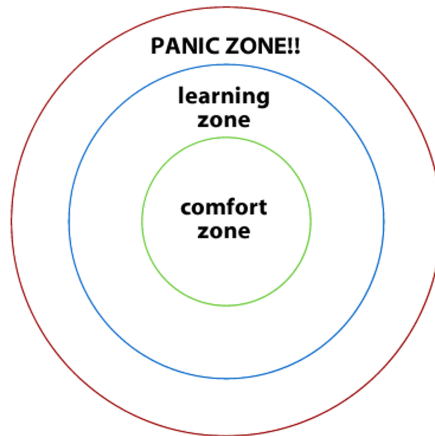Chart 1: *(http://blog.pickcrew.com/getting-out-of-your-comfort-zone-why-its-hard-and-why-you-should/)*

Emotional Intelligence As a Changing Quality

It is of the utmost importance for the students to realize and integrate the fact that even though they cannot alter their IQ or they personality, they can still influence their emotional intelligence and the way they approach their studies.
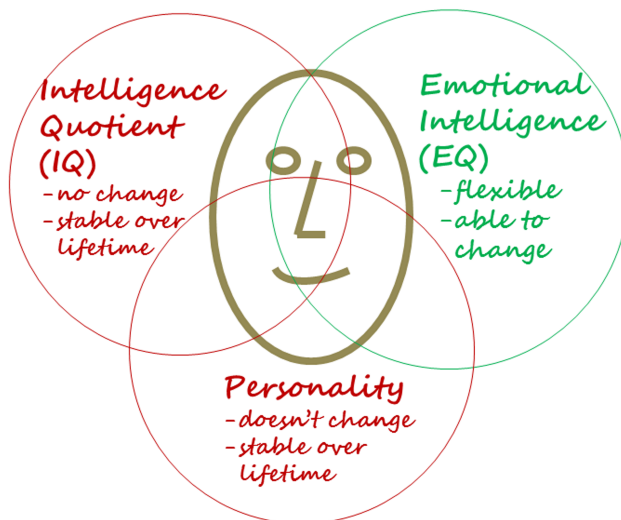

Chart 2: *(plumproductions.inc)*

To be able to do so, students analyse this fact in their own context and are then given an exercise to determine which intelligence (based on checklists provided by Armstrong, 2012, and inspired by multiple intelligences theory), is their strongest and how they could use this particular intelligence to improve their learning reality, in this particular case, their English. This activity was for most students very powerful as it manifested the connections between the different intelligences, and gave practical interlinked suggestions for minor changes resulting in a substantial impact on learning.

Key Elements of Emotional Intelligence Used in Lessons

After the students have acquired the necessary knowledge of what emotional intelligence was and what tools it provided, they were ready to start implementing some of the elements. Due to space constraints, this paper does not aim at explaining the basics of emotional intelligence[2], for the purpose of this article it is enough to define it as a set of skills using the information system of emotions. These skills were thoroughly examined and those that were likely to assist the students in the implementation process were chosen.

The key skills, or elements, of emotional intelligence that were selected for their potential to make a difference in foreign language acquisition fell into the three following categories as follows (though they often intertwine):

1. **emotional awareness:** acknowledgment of the aforesaid system is a fundamental precondition;
2. **access** to this system: the ability to identify emotions in oneself and other people, (verbal or nonverbal cues), distinguishing individual emotions – how they blend together and change, acquiring the relevant vocabulary;
3. **managing and regulating emotions**: learning techniques for calming down before an exam or presentation that makes students nervous, awareness of the fight-or-flight reaction, motivating oneself during strenuous, repetitive, demanding or seemingly irrelevant tasks, engaging other people in a discussion, problem-solving sessions or study support groups; in short using the emotions and the information provided by them for production of something creative.

Equally important, the students also needed to bear in mind that emotions are contagious; the most emotionally expressive person transmits their mood in a group within minutes, while positive feelings spread more powerfully than negative ones, the smile being the most contagious emotional signal of all. This fact on its own might persuade students when presenting, or even teachers perhaps, to strive to be the most positively emotionally expressive person in the classroom.

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[2] For fuller understanding of the topic see e.g. Mayer and Salovey, Goleman or Brackett

The three aforementioned categories can be further subdivided into individual skills that lessons were aimed at. The final part of this paper provides a list of these individual skills with comments relevant to foreign language acquisition and descriptions of tendencies that experience in the classroom has shown:

- **The ability to take direction and feedback** from tutors and peers while not getting offended and as a result self-directing oneself; this includes self-reflection, self-assessment, self-confidence and perseverance (to practice this particular one, students were asked to do things they are not good at) or self-control.

- 'Being able to name your feelings and put that together with your memories and associations turns out to be crucial for self-control.' (Goleman, 2013) Activities aimed at this skill have shown that the ability to take direction and feedback is sometimes diminished in students who are individualist and who tend to fight for their creations only because they are their own. Perfectionist students on the other hand had a tendency to fear failures. They needed to be repeatedly reminded that 'When failure is not an option, we can forget about learning, creativity, and innovation' (Brown, 2012). And that each step in their learning processes has an element of success as well as an element of error, and every other step is an effort to get the balance back, just like when walking (Brooks, 2012). However, the students involved in this trial classes were not asked to go as far as the students of Boston Philharmonic's conductor and teacher, Benjamin Zander, who instructs his students to lift their hands in the air, smile and say 'How fascinating', after they make a mistake (Zander and Zander, 2002).

- **Self-reflection** was found out to be by far the most problematic aspect of the emotional intelligence toolkit, as is regularly visible not only in lessons but also in logs of autonomous students who are purposefully instructed on self-reflection and asked to integrate regular self-reflections in their journals and recordings of their studies. Yet, from the few successful ones, it was clearly visible that regular and determined efforts of reflective practice with plentiful examples of their own learning do inevitably lead students to notice the emerging patterns, providing them with valuable and much sought-after data about themselves and their studying habits.

- **Self-assessment** had a tendency to oscillate between two extremes, harsh self-criticism and blind praise, the first of which was more frequent. Another typical characteristic of students' self-assessment was its shallowness. Together with giving peer feedback, this is a skill that needs serious consideration and practice in any language classroom. Being given specific guidelines, examples and tools, as well as enough practice, facilitates the process considerably and brings it closer to the students.

- **Self-confidence** is an element that is assumed to prevail in contemporary students. However, as students sometimes admitted themselves, it is often artificial, serving as self-esteem protection measure and when challenged, it might evapo-

rate. In this case, it proved useful to build the students' confidence around their solid self-assessment and profound feedback (tutor- and peer-based).

- **Perseverance** and **self-control** (which are invariably connected to the preceding skill) are qualities that have the reputation for not being recognized in the 21st century. However, they still matter substantially; therefore I felt a pressing need to incorporate them into the lessons. Teachers might find it difficult to promote these qualities in their classroom for the fear of being viewed as old-fashioned and conservative. However, this was challenged by furtively but deliberately incorporating listening and reading practices based on interesting narratives of successful people who were willing to try harder. Old-fashioned or not, it is still more than likely that: 'In scientific work, excellence is not about technical competence, but character' (Ernest O. Lawrence in Goleman, 2000). On the other hand, some authors point to research showing that self-control is an exhaustible resource (Hood, 2014), and therefore striking a balance once again needs to be considered.

- **The ability to concentrate,** which, according to some authors (Goleman, Brooks…), is the key element of emotional intelligence – 'Attention is our most precious resource.' (Goleman, 2013). The capacity of the working memory is limited and the less people focus consciously on a task, the more space is occupied by emotionally-driven thoughts of diverse character. It needed to be stressed to students that thoughts of the kind 'I should be studying…' do not fall into category of conscious focus. Thoughts of this kind imply that studying is not happening and in that case numerous questions should be pondered. What is distracting me from the given task? Is it external or internal? What can I do about it? The answers may range from very practical and straightforward (open a window, get some nutritious food, drink plenty of water, go for a short walk, clear the clutter from your working table, get a more comfortable chair or try to change the spot of work altogether) to the more fluid (dealing with the preeminent emotionally-laden issue that is occupying most of the attention capacity, e.g. writing an email or making a phone call to resolve such an issue, using a timer to reduce the hesitation time before any task gets done, or if there is no time, i.e. during an exam, doing a series of breathing exercises.) Obvious as it might sound, it did not always come naturally to the students and bringing this kind of awareness into learning enabled them to deal more efficiently with the task at hand, to experience positive feelings of fulfilment and to motivate themselves more smoothly next time.

- **The ability to survive change;** as change is ever-present in human lives and careers, it should be one of the aims of education institutions to prepare students not only to survive it but also to use it for their own benefit. With change inevitably come fear, anxiety and discomfort. Fear in particular is a very powerful emotion influencing learning heavily.

> During stress or fear, the RAS (reticular activating system) filter gives intake preference to input considered relevant to the perceived threat, at the expense of

the sensory input regarding the lesson (Shim in Mind, brain and education). Unless the perception of the threat is reduced, the brain persists in doing its primary job – protecting the individual from harm. During fear, sadness, or anger, neural activity is evident in the lower brain, and the reflective, cognitive brain (prefrontal cortex) does not receive the sensory input of important items, such as the content of the day's lesson' (Willis in *Mind, brain and education*).

- Therefore, it was considered significant to highlight that teachers and students alike need to be aware of what they fear in the learning/ teaching process and what they could do about it (make the fear conscious, accept it and then do the thing they fear over and over and over again, until the fear disappears, at the same time making sure not to interchange perceived and real danger). It goes without saying, that the impact of such a practice is manifold. At workplaces, for example, innovators with the courage to go against the established order and against fear are highly prized, and to meet this need, it was felt, one of the aims of educators should be widening students' horizons and encouraging creative and innovative solutions with an array of strategies (e.g. angel's advocates – always giving positive feedback first) at the same time keeping at bay the four creativity killers: surveillance, evaluation, overcontrol (micromanaging) and relentless deadlines (Teresa Amabile, in Goleman, 2000).

- **Finding a mentor**, or perhaps someone to practice with is more valuable for students who score high in interpersonal intelligence. However, as languages are meant to be spoken, finding anyone willing to speak the target language counts. Thus, students were often reminded of the fact and encouraged to undertake the necessary (often not too comfortable) steps.

- **Grounded intuitions**; though intermittently underestimated and overvalued in the past, they have now reached equilibrium and have been acknowledged by scientists (Damasio, 2005) and are sought after by companies (Goleman, 2000); they require immense knowledge-gathering phase (and therefore persistence) but have the potential of yielding effective results. Whether in management or in deciding the correct tenses, grounded intuitions are the secret weapon, which is a concept many of the students needed to be introduced to.

- **Positive attitude** might be considered the obvious element of emotional intelligence, and practically taken for granted, but it is still not regularly made effective use of. Students learn more effectively if they are positive about what they are studying. The students themselves can influence, alter and produce such a learning enhancing attitude despite not being aware of it. The task of the teacher remained to bring this reality into their awareness.

- **Inner rudder:** Emotions represent our deepest values; the values are the scale to compare individual feelings to. Subsequently, when people go against those values, they experience negative emotions (i.e. in learning when students are forced to learn in a way they consider ineffective). It is worth noting here that whenever teachers make their students contradict their own values, these students may

experience negative emotions which they are likely to link with the respective teachers.

As mentioned above, all these elements are competencies that can be learnt. The first step is the also aforementioned awareness of how mental processes and behavioural patterns determine learning, the subsequent step then focusing and refocusing. The effectiveness in performing any task, any learning is determined by to what extent we can focus (Goleman, 2013). Your focus determines your reality (Master Yoda in Star Wars). This needs to be practiced to perfection, as attention, as has been proven by research, works like a muscle (Blackwell in Bronson and Merryman, 2009). And also, the latest neuroscience findings point to the fact that, when people are learning something new, the learning takes place in the frontal cortex with numerous neurons assisting the task. When the task is repeated often enough, it becomes automatic, the neural pathways for this skill are delegated farther down the cortex, and the neurons in the frontal cortex are available for further learning (Greene, 2012). These data can serve as an argument for implementing emotional intelligence competencies into a foreign language classroom as the vast majority of students were not familiar with these facts and found them immensely useful.

Being aware of the research on attention, students might consider the option to deliberately switch off all their devices or communication applications during learning, in order to avoid being in a state of continuous partial attention. As was so very exactly put as early as 1977 by Herbert Simon, a Nobel-winning economist: what information consumes is 'the attention of its recipients. Hence a wealth of information creates a poverty of attention…' (http://www.economist.com/node/13350892).

Conclusion

Whenever learning is undertaken, there is an undercurrent of emotions going on with crucial information. Whether it is taken into consideration or not, it is still there. By acknowledging it, by labelling the emotions related to different aspects of learning, and by working with them, the individual process of learning is mastered. The tendency to be disappointed by 'failures' is likely to diminish as failures are taken as parts of the learning process, as learning experiences. For this realization, emotional intelligence is the corner stone, the most fundamental element, the very basics of any learning. This article has looked at emotional intelligence skills from the perspective of foreign language learning/ teaching and has shown what particular elements of emotional intelligence can the foreign language classroom benefit from and how. It did so based on the experience with students in standard classes as well as modular lessons and individual language counselling. Putting theory into practice, interesting patterns emerged; these are discussed in the second part of the paper. The patterns shed light on elements of learning that might otherwise elude the students (and teachers). Learning a language is not easy, some might call it hard work. However, it is

not restricted to the talented few, and I argue that when using emotionally intelligent strategies, every student can succeed.

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Bionote

Eva Trumpešová-Rudolfová, e-mail: qtrumpes@fi.muni.cz, Masaryk University Language Centre.
Eva teaches ESP and EAP classes, is a passionate member of English Autonomously team, and a counsellor. She is an ardent ambassador of life skills and in her lessons she promotes cooperation, effective communication, critical thinking, creativity, learning skills, self-reflection and emotional intelligence.

Raising Self-Awareness and Developing Intercultural Competence by Activating Personal Filters

Enrica Rigamonti and Anila R. Scott-Monkhouse

Abstract: All individuals are fitted with filters which affect their experience of the world and which depend on various factors, including personal traits and cultural influences. Language is a reflection of the self, and of the culture and people it belongs to, thus when learning a new language each individual is approaching a different identity and culture with personal filters which act on the learning process. Learning involves approaching something new and inevitably leads to some change, which may occur without conscious awareness but is affected by the individual's attitude towards novelty and diversity.

This joint project involved learners of English (Parma University) and of Italian (University of Salzburg) as L2, and aimed at indirectly testing these filters. The objectives were to verify if their filters are subtly expressed in their way of seeing themselves, their own language and culture, and the 'other' language and culture, and also raise their awareness of them. This hopefully is a stepping stone towards discovering aspects of their personality, developing sensitivity to differences and recognizing factors to be exploited to become more efficient learners.

Key words: awareness, intercultural competence, personal filters

Abstrakt: Jedes Individuum nähert sich – beim Erwerben einer neuen Sprache – einer anderen Identität und Kultur mit persönlichen Wahrnehmungsfiltern.

Studierende des Englischen (L2) in Parma sowie des Italienischen (L2) in Salzburg nahmen an einem Projekt teil, dessen Ziel war es, die Auswirkungen der persönlichen Filter in der Selbstwahrnehmung, in der Wahrnehmung der eigenen Sprache und Kultur, sowie der fremden Sprache und Kultur bewusst zu machen.

Schlüsselwörter: Wahrnehmung, interkulturelle Kompetenz, persönliche Wahrnehmungsfilter

Abstrakt: Každý jednotlivec je vybaven filtry, které ovlivňují jeho vnímání světa, a které závisejí na různých faktorech, včetně povahových rysů a kulturních vlivů. Jazyk je odrazem našeho "já", kultury a lidí, kterým patří. Při studiu nového jazyka tedy každý jednotlivec přistupuje k odlišné identitě a kultuře s osobními filtry, které působí na studijní proces. Studium zahrnuje přiblížení se něčemu novému a nevyhnutelně vede k určité změně, která může nastat nevědomky, ale je ovlivněna postojem jednotlivce k novému a různorodému.

Tento společný projekt zahrnoval studenty angličtiny (Univerzita v Parmě) a italštiny (Univerzita v Salzburgu) jako druhého jazyka a jeho cílem bylo nepřímo testovat tyto filtry. Záměrem bylo ověřit, zda jsou filtry studentů skrytě vyjádřeny ve způsobu, jakým vidí sebe, svůj vlastní jazyk a kulturu a ten "druhý" jazyk a kulturu, a také zvýšit jejich povědomí o nich. Doufejme, že to je první krok k odhalení stránek jejich osobnosti, rozvoji vnímavosti k rozdílům a rozpoznání faktorů, které lze využít k tomu, aby se jejich studium zefektivnilo.

The present paper describes the development of a joint project which was first presented at the conference on 'Multilingualism – A Challenge for Science and Education: Research, Development and Practice', held in Salzburg (Austria) on 6–7 November 2009[1]. In carrying out the activities outlined, principles from Neuro-Linguistic Programming and the theory of Multiple Intelligences were applied to learning a foreign language and culture with the aim of raising both the teacher's and the learners' awareness of their personal filters, reflecting on the way these filters affect each individual's perception of their 'self', of their own language and culture, and of the 'other' language and culture, and ultimately developing sensitivity to differences as a gateway to intercultural competence. At the same time learners discovered new aspects of their identity and personality, and were able to recognize what learning approach benefits them as a step to becoming more effective and more self-sufficient in the learning process.

1   Personal filters in action

Learning involves comprehension of unfamiliar input from the external world and its transformation into familiar, internal and potentially usable intake (Willing, 1989). Each individual has a specific way of learning – this is a reflection of their way of experiencing things. The fact that things are perceived in different ways and that different details are focused on affects a person's ideas and thoughts, including their opinion of oneself as an individual and as a representative of their own language, people, and culture, but also their opinions and feelings towards what is new and what they (decide to) learn. Each individual is fitted with a set of filters which influence their perceptions and consequently their conceptions of the world (Utley, 2004): these filters delimit what stimuli a person will pay attention to and the way s/he may (choose to) interpret them. However, learning, or more broadly, approaching something new inevitably involves some kind of change: that which was not part of the person is assimilated and integrated with other resources, and becomes part of the 'self' (Willing, 1989). Much of the learning process in the full sense of the term takes place without conscious awareness (Willing, 1989), and the change an individual undergoes is often unconscious, yet it is affected by, and at the same time acts on, their attitude towards novelty and diversity.

According to Neuro-Linguistic Programming (NLP), individuals perceive the world and therefore learn through their senses; this sensory information is translated into thought processes and transformed into meanings, beliefs and expectations, which in turn affect the emotions and behaviour of the person, and language is used to conceptualize and communicate experiences as they are mentally coded through internal processes and strategies (Satrajit, 2010). The way this is done varies from individual to individual, and this different perception, and consequently the attention to dif-

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[1] http://www.uni-salzburg.at/index.php?id=30455 [07.04.2015].

ferent details, act as filters on what is taken in (Baker/Rinvolucri, 2005). The input received from the environment is therefore interpreted and in some way 'distorted' also on the basis of what is already present in one's mind. Sensory acuity is one of the pillars of NLP, and includes channels which are visual, auditory, olfactory, gustatory and kinaesthetic (i.e. outer and inner movement, thus motion and emotion).

The theory of multiple intelligences (MIs) developed by Howard in 1983[2] also focuses on individual ways of making sense of the world and its stimuli, and consequently reacting to them. The notion of one single intelligence has been replaced by the concept of several relatively mutually independent intelligences existing in each individual, with different ones being used simultaneously most of the time. However, in each person some intelligences tend to be more dominant than others and may also develop, be trained and strengthened over time (Mariani/Pozzo, 2002). The different intelligences refer to different abilities (Nicolini, 1995; Puchta/Rinvolucri, 2005; Volterrani, 2007), i.e. very briefly:

- Linguistic intelligence: ability to use words, both written and oral.
- Logical/Mathematical intelligence: ability to discover patterns and connections, solve problems, analyse situations linearly, plan, prioritize and organize.
- Musical/Rhythmic intelligence: ability to detect sound patterns, reproduce sounds, recognize intonation.
- Visual/Spatial intelligence: ability to relate to space, and create and understand images (including mental images).
- Bodily/kinaesthetic intelligence: ability to coordinate and use one's body.
- Interpersonal intelligence: ability to relate to and understand other people.
- Intrapersonal intelligence: ability to look into oneself and understand one's feelings, learn from mistakes, exercise self-control.
- Naturalistic intelligence: ability to be instinctively in relationship with nature.
- Existential/Spiritual intelligence: ability to reflect on ultimate issues.

Of the intelligences above, the first five have their own codes: the alphabet, words, punctuation, ideograms, numbers, mathematical symbols, musical scores, phonetic symbols, diagrams, charts, graphs, pictures, shapes, sign language, miming, gestures, etc., whilst the final four need the systems adopted by the others to express themselves (Puchta/Rinvolucri, 2005). Moreover, the linguistic, bodily/ kinaesthetic and interpersonal intelligences relate to interactive skills, whilst the visual/spatial, intrapersonal and existential/spiritual intelligences relate to introspective skills; finally, the logical/mathematical, musical/rhythmic and naturalistic intelligences refer to analytical skills (Volterrani, 2007).

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[2] Cf. also Gardner's official website http://multipleintelligencesoasis.org/ [13.04.2015].

2   Identity, language learning and intercultural competence

As teachers of a foreign language we were interested in how all this is linked to both teaching and learning another language (L2/Ln), and to approaching the culture (C2/Cn) which is expressed by it. The connection between language, culture and identity has long been known. Migration and mobility have proven that multiculturalism is now an established fact of life, so much so that the EU Commission designated 2008 as the year of Intercultural Dialogue. Although the changes they bring about are undoubtedly enriching for society, they also pose challenges related to integration. It is clearly the responsibility of educators to ensure that the young people of today in multicultural Europe are prepared to meet these challenges (Banzato/Dalziel, 2008; Verdooren, 2014), as a lack of skill which prevents from interacting according to the norms of an Ln community can be costly and even result in lost opportunities for professional, academic, economic advancement, or social relationships. The Bologna Agreement in 1999[3] stressed the role of universities and institutions involved in higher education in preparing internationally minded, interculturally trained, multilingual graduates able to operate in multi-cultural, multi-ethnic contexts. This declaration is a commitment of each country to reform its higher education to reach convergence at a European level to face issues of transnational education, increase competitiveness of the European higher education system, enhance mobility of citizens as students and workers, promote the employability of students, and cover lifelong learning experiences. This is further reflected in the Bologna Process 2020[4], which also emphasizes the importance of student-centred learning in a changing labour market where mobility and globalization are key issues as they contribute to personal development, increase both cooperation and competition, and foster respect for diversity and a capacity to deal with other cultures[5].

It is therefore obvious that language courses cannot afford to simply teach language, but are also required to favour the development of intercultural competence and mutual respect and sensitivity as essential factors in facilitating mobility and integration of people as regards studies, work and tourism[6]. Teaching culture needs to be an essential part of the courses too and learners need to attain Ln socio-cultural competence as "the purpose of teaching culture together with other language skills is to increase learners' interactional as well as linguistic competences" (Hinkel, 2001:445). One of the first points to be considered is how culture is defined. Perhaps one of the most complete definitions is the one provided by the British anthropologist Edward B. Tylor (1871: 1), who defined culture as "that complex whole which includes

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[3] http://www.magna-charta.org/resources/files/BOLOGNA_DECLARATION.pdf [29.03.2015].

[4] http://www.ond.vlaanderen.be/hogeronderwijs/bologna/conference/documents/leuven_louvain-la-neuve_communiqu\%C3\%A9_april_2009.pdf [29.03.2015].

[5] Cf. also Antor, 2007.

[6] Cf. also Mchitarjan, 2014.

knowledge, belief, art, law, morals, custom, and any other capabilities and habits acquired by man as a member of a society". What emerges clearly is that it is complex, as it involves products (e.g. literature), ideas (e.g. values), norms and behaviours (e.g. celebrations, gestures) (Grove, 2004), it is acquired, thus shared, and it identifies an individual as a member of a given society, which means it provides identity through factors which guarantee uniqueness through differences, as culture represents at the same time difference and elimination of difference because by being part of a group a relative homogeneity is established, perpetuated and enforced (Appiah, 2005). Each language embodies the unique cultural wisdom of the people who speak it (UN-ESCO, 2003), thus language and culture together provide security to the individual. When one or more individuals recognize common elements of their 'selves' within a group, they perceive (their) *identity* and a sense of belonging, and cultural identity is specifically experienced when meeting another culture (Müller/Gelbrich, 2014).

Interculture can be considered as an orientation in the way of thinking and acting "based on the unity out of the diversity" (Yousefi, 2006: 64). This means that, on the one hand, an individual retains the otherness of his/her culture, and on the other, s/he accepts the otherness of the culture s/he approaches. Intercultural communication can only take place when neither of the cultures coming into contact has primacy. Indeed, hermeneutics of any intercultural communication requires that when two people interact, they are simultaneously aware of themselves and of each other. It is thus obvious that individuals need to acquire intercultural competence and this cannot be done simply by accumulating language skills or knowledge about another culture. What is needed is reflection about language and culture, as well as social knowledge and skills (Allemand-Ghionda, 2007). Intercultural competence therefore cannot be assumed to be one single competence, rather it is the intersection of many competences.

However, in this framework of multilingualism and interculture which seems to blur the boundaries of individuality, have we lost sight of the needs of the individual and of the community s/he belongs to? How can they be met and overcome to encourage intercultural communication, which is now a priority for societies and nations? And how can we meet the need of lifelong learners? These were the questions which gave rise to our project.

3   Personal filters, self-awareness and intercultural awareness

Our main interest as teachers is the centrality of the learner and their active participation in all the stages of the lesson, from planning to feedback. What we need to consider is the complexity of the learner as an individual, i.e. the distinction between the 'self' and the 'person', the former referring to what each individual perceives of themselves, the latter to what the others perceive of the individual (Pavlenko/Lantolf, 2000). In other words, the self refers to the personal sphere, whereas the person

refs to the social domain. Both the learner and the teacher are representatives of each one's language and culture, being linguistic and cultural elements indissolubly connected. This also means that discovering oneself does not only open up a personal perspective, but also helps to define the role(s) one plays in society (Lüdi, 2007). As individuals we perceive other people through their appearance, character and way of presenting themselves and interacting in society, and through our filters we reconstruct their identity as a product of both language and culture, assuming language to be both the repository of culture as well as the tool by which culture is dynamically and unceasingly created (Hall, 2002).

Our starting point was that each person's language is part of their identity, and their way of speaking reflects and expresses who they are (Lowes/Target, 1998). Each individual has values, expectations, attitudes, but also a personal way of presenting and representing themselves, as well as personal grids to evaluate matters. At the same time each individual is also a representative of the cultural background they belong to (Bolten, 2011). The limits of the individual are determined by personal filters through which they perceive and experience the world. When experiencing something new, the individual passes through an ongoing process of assimilation and accommodation (Hu, 2007). However, due to their personal characteristics, each individual reacts to and assimilates new inputs in a different way. We can assume that the individual learner is changing even when this new input is a specific input of Ln, and the evolution deriving from these assimilation processes also continuously influences the learner's multilingual system (Jessner, 2006).

We agree with Huber-Kriegler et al. (2003:9), according to whom "you should first look in the mirror at your own culture, and out of the window at other cultures you are interested in or want to interact with", and wanted to verify if and how personal filters affect the learners' perceptions of their own self, their own language and culture, and the 'other' language and culture. We chose to do so by adopting the NLP principles of sensory acuity and Gardner's theory of Multiple Intelligences. Our objectives were twofold: to develop the learners' sensitivity as to their own personal learning preferences and filters, and to identify how these might shape their opinions concerning, on the one hand, their own language and culture, and on the other hand, other languages and cultures.

3.1 Exploring Identity, Language and Culture in Class

The following in-class activity contains practical ideas for developing intercultural awareness and cross-cultural understanding. It was carried out during a 90-minute class with five monolingual groups (three in Austria, two in Italy) at B1+/B2 level of knowledge of the foreign language, with 92 adult learners who were either Austrians learning Italian as a foreign language (Dante Alighieri school of Italian; University of Salzburg) or Italians learning English (Parma University Language Centre). Classes

focused on general language (i.e. not for specific purposes); group sizes ranged from 6 to 24 participants, and the learners' age ranged between 21 and 56 years.

The activity was presented as a speaking task in which learners would learn something about themselves and about each other; indirectly it aimed at stimulating intrapersonal and interpersonal intelligences by getting them to reflect on their opinions and comparing them with others, as well as gaining insights into their own culture and the foreign culture they were learning. The activity was divided into three stages, each with a separate handout for the students with 12 stem sentences to be completed by working individually. These sentences consisted in metaphors which had been deliberately chosen to reflect principles from NLP, the theory of MIs and components of culture.

In the first stage, learners completed the metaphors in Table 1 (If I were…, I'd be…) thinking about themselves (self-perception); they were then asked to choose the 5 metaphors which they identified most with, make a note of the reasons and then explain their choice to each other working in pairs. Our underlying assumption was that this first-stage choice would reflect their personal filters and emerge in the following stages. In the second stage the learners went through exactly the same steps but completed the same metaphors by replacing the stem sentence with "If Italians/Austrians were…, they'd be…" to reflect their perception of their own language and culture. Finally in the third stage, the students went through the same procedure this time thinking about the language/culture they were learning (i.e. If the British/Italians were …, they'd be …)[7].

The papers with the learners' choices and reasons were collected for research purposes and analysed in order to verify if there were patterns, similarities or differences across the three stages. This was carried out by putting the choices into a single table (Table 2).

We noticed that very similar, and often the same metaphors appeared to have been chosen and we realized that personal filters seemed to shape the students' opinions on the notions of self, native language and culture, and foreign language and culture, ultimately confirming stereotypes (if not prejudices at times). In the following class, the papers were returned, and the learners were asked to verify if they recognized any similarities or differences within their own choices across the three stages. This led to a class discussion on how these filters may be relevant to learning and shed light on their own learning preferences, how they may affect their approach to something new and how they may be counterbalanced when being aware of them[8].

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[7] A detailed lesson plan is available in Scott-Monkhouse, A. R., Rigamonti, E. (2010). Me in Metaphors. Discovering and Uncovering Myself through NLP and Multiple Intelligences. *Humanising Language Teaching*, 12(4). Available on http://www.hltmag.co.uk/aug10/sart07.htm [03.04.2015].

[8] The development of the activity and ensuing class discussion related to 'learner training' is described in detail in Rigamonti Permanschlager, E., Scott-Monkhouse, A. R. (2010). Myself, my language and my

Tab. 1: *Handout 1 given to the students. The references to MIs and NLP principles printed in italics on the right were not present on the learners' copies. All sentences stimulate intrapersonal and interpersonal intelligences.*

Handouts 2 and 3 had different stem sentences, i.e. "If Italians/Austrians were…, they'd be…" (h. 2) and "If the British/Italians were…, they'd be…" (h. 3) to reflect their native language and culture, and the language and culture they were learning, respectively.

If **I** were…,	**I**'d be…
a work of art (painting, sculpture, photograph, etc.)	*visual*
a piece of music or song	*musical / auditory*
a literary work (novel, poem, etc.) or movie	*linguistic*
an invention or tool	*kinaesthetic*
a scent/smell	*olfactory*
a food or drink	*gustatory*
a pastime (game, hobby, sport, etc.)	*kinaesthetic*
an animal	*visual / kinaesthetic*
a natural element (weather condition, landscape, flower, etc.)	*naturalistic*
an item of clothing	*visual / kinaesthetic*
a moment in time (season, part of day, hour, etc.)	*intrapersonal*
a proverb or way of saying/idiomatic expression	*linguistic*

Tab. 2: *The answers provided by Annamaria, an Italian student learning English*

If I were…, I'd be…	If Italians were…, they'd be…	If the British were…, they'd be …
Music soundtrack of the movie *Piano lessons*	**Smell** garden	**Song** Beatles
Invention microscope	**Literary work** *The Divine Comedy* by Dante Alighieri	**Literary work** plays by Shakespeare
Work of art painting	**Work of art** painting by Caravaggio	**Food** apple pie
Clothes scarf	**Sport** soccer	**Sport** rugby
Natural element tree	**Natural element** seaside landscape	**Natural element** hills

3.2 Raising Intercultural Awareness in Class

Having raised the students awareness of their personal filters, we decided to enter the field of culture by deliberately activating these filters, and chose to explore two distinct domains, one which is perceived as being more related to the person (i.e. a typical house) and one which is more linked to a professional situation (i.e. a business lunch), with the aim of discovering, understanding and possibly overcoming

culture. Who am I? Identity, Language and Culture through NLP and Multiple Intelligences. In Newby, D., Rückl, M., & Hinger, B. (2010). (Eds.) *Mehrsprachigkeit: Herausforderung für Wissenschaft und Unterricht.* Wien: Praesens Vorlag, 243–260.

negative perceptions and stereotypes, and also helping learners acknowledge the similarities and cope with the differences between their own and the other culture by establishing a positive intercultural atmosphere through discussion.

3.2.1 A Typical House

We chose the house as the first domain as it represents one of most personal associations of any individual. This activity was carried out as an individual written activity followed by class discussion, and visual material (e.g. drawings and pictures) was allowed. The description was guided by using questions which were meant to activate the learners' personal filters, as shown in Table 3[9], and develop observation, interpretation and critical thinking skills.

Tab. 3: *Questions to guide the students' description.*
The references to MIs and NLP principles on the right were not available to the learners. All questions stimulate verbal/linguistic intelligence.

What can you see? What does it look like?	*visual*
What can you hear?	*auditory*
What can you smell?	*olfactory*
What do you/other people do?	*kinaesthetic/interpersonal*
How do you feel? How does it feel?	*kinaesthetic/intrapersonal*

In the first stage learners were asked to answer the questions individually thinking about a typical house in their own country (i.e. in Italy/Austria), then identify the two features which each believed was the most characteristic and explain their choices to each other working in pairs. In the following stage they answered the same questions about what they felt was a typical house in the country whose language they were learning (i.e. in England/Italy) and once again chose the two descriptions which they felt were more relevant and explain their choice to each other. A class feedback was then conducted to verify which answers were the most frequent and draw up a description for both houses which took these elements into consideration (Table 4). Inevitably the description of the houses included some reference to their occupants.

The students compared the two houses and discussed advantages and disadvantages, likes and dislikes in pairs, and reflected on possible explanations for some of the differences. They then worked in groups to list some tips for a young, inexperienced foreign person travelling to their country as an au-pair or a live-in student, and prepare a leaflet of useful suggestions. The aim of the simulation was to raise the students' awareness of their way of approaching an intercultural situation which is often experienced by young people when going abroad on a summer course or

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[9] This activity is largely based on the lesson plan Scott-Monkhouse, A. R., Sañudo Hernandez, J. L. (2009). House and furniture: A speaking activity. *Humanising Language Teaching*, 11(3) available on http://www.hltmag.co.uk/jun09/less02.htm [05.04.2015].

Tab. 4: *A summary of some the most frequent answers given by Italian students learning English*

A typical house in...	Italy	Britain
What can you see? **What does it look like?**	plenty of light, very bright inside; a big kitchen, a tiled balcony	two floors; bay windows draped with heavy curtains (no blinds); a fireplace; wall-to-wall carpets
What can you hear?	TV and someone talking on the balcony	an old clock ticking; rain against the windows
What can you smell?	coffee	apple pie
What do you do? **What are people doing?**	invite friends for a meal, and drink some good wine	sit by the fireplace; drink tea; listen to music
How do you feel? **How does it feel?**	It's a little noisy but pleasant.	comfortably warm and calm

Erasmus project by thinking about similarities, differences and stereotypes (if not prejudices) in order to develop understanding and greater flexibility towards the other culture, and foster respect and empathy for what is different.

Finally, the learners engaged in a project in which they compared their descriptions of the 'foreign' house with authentic estate agents' websites / house magazines in order to highlight similarities and differences with their beliefs and expectations, and consequently become more sensitive to their own filters and to the reasons for the description they had initially provided.

3.2.2   A Business Lunch

We chose a business lunch as the second domain to be explored as it is one of most frequent situations encountered in professional settings and represents a time when relationships are built and consolidated with individuals and their respective cultures really coming into contact.

Once again, we wanted to create a positive atmosphere by using the students' imagination and providing multi-sensory stimuli. The students imagined they had been invited to a business lunch in their country and answered the same questions as in the lesson on the typical house (Table 3)[10]. Just like the previous one, this activity was first carried out as an individual written activity with the learners being guided in their description. They were then asked to choose the two answers which they felt represented them best, and in pairs explain their answers and choices to their partner. In the next stage the students carried out a similar task, this time imagining they were participating in a business lunch in the foreign country. At this point the students were asked to compare the two countries and discuss their answers with their partner.

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[10] The detailed lesson plan is available in Scott-Monkhouse, A. R., Rigamonti, E. (2012). A Business Lunch: an Intercultural Activity. *Humanising Language Teaching*, 14(1) on http://www.hltmag.co.uk/feb12/less03.htm [05.04.2015].

The next step was to think about what they would change in each situation to help a foreign guest feel more at ease in their country and in the case of them being foreign guests in the other country (e.g. an Italian at a business lunch in Austria, and an Austrian at a business lunch in Italy). They then ranked the differences in order of importance for a successful business lunch. The aim of these questions was to sensitize the students to their way of approaching a frequent professional intercultural situation, and to get them to think about differences and stereotypes in order to weaken them and create an understanding for the others' way of behaving, while looking for reasons for these differences[11].

Tab. 5: *A summary of some of the most frequent answers given by the Austrian students learning Italian*

A business lunch in...	Austria	Italy
What can you see? What does it look like?	very good restaurant with a friendly atmosphere; people checking the time before beginning	very good restaurant, high-quality elegant attire and accessories; groups sitting in separate rooms; people leaving the dining-room to smoke
What can you hear?	laptop humming on the table; people discussing business, in turns, one at the time	people talking about family, soccer, cars; ringtones and mobiles going off
What can you smell?	tobacco, orange juice	after shave lotion and coffee
What do you do? What are people doing?	I read the handouts carefully, conclude my business, leave the restaurant after the meal and go back to my office	I wait for the Italian executives to arrive
How do you feel? How does it feel?	I'm absorbed in my work	Frustrated: I wonder when we will actually start discussing business! At the end I feel exhausted

Finally, students were asked to imagine they were to organize a course on etiquette for executives from their own country and from the foreign country. The students worked in groups to pool ideas and compare opinions, and created a poster with suggestions and advice about how to behave and what to avoid doing.

The follow-up stage, in which the students highlighted their own filters and reasons for a certain description, was carried out in different ways. One group compared their description with authentic material (e.g. websites, YouTube videoclips, etc.) with the aim of confirming or disproving their opinion during the class session itself. Another group compared their description with authentic material at home and the follow-up discussion took place in the following lesson where an excerpt of a film

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[11] An interesting analysis of the different national and cultural dimensions interplaying in negotiations and business lunches can be found in Gibson, R. (2008). *Intercultural Business Communication*. Berlin: Cornelsen, 77–82.

or a passage from a book was taken to confirm or disprove the stereotypes of the students' descriptions[12].

4   Conclusions

The whole project has revealed itself to be a process of guided discovery and self--development for both our learners and ourselves as teachers. From the teacher's perspective we have come to realize that what we transmit to our learners is not actually *the* language and *the* culture, but rather what we ourselves perceive through our own filters, acting as mediators both as teachers and as representatives of the language and culture we teach. As teachers we undergo a continuous change which leads to new perspectives on teaching and involves our attitude towards not only the learners, but also the language and culture we teach, as well as the way we convey them. At the same time this realization has helped us understand the complexity of the process our learners experience when approaching a new language. From the learners' perspective, by becoming aware of their filters they have developed higher level cognitive skills and discovered both their identity and centrality as active participants in the Ln learning process. They have realized that these filters need to be taken into account when approaching and formulating an opinion on something new, including a different language and culture. In an age in which migration and integration are key features, self-awareness is a way of reflecting on what and who we each are as individuals and as representatives of our language, people, and culture, and how this may affect our attitude towards other languages and cultures. Raising awareness of the differences and similarities existing between individuals in the class then became a starting point for reflecting on sensitivity to differences, appreciation and respect of diversity, openness to novelty as an enriching experience, acceptance, and flexibility. As Laugier (2009) pointed out, paradoxically it is by questioning personal identity and the individual representations of what is 'self' and what is 'other' that 'the others' and their cultures are actually recognized. This self-awareness can then develop into intercultural awareness, where the prefix 'inter-' presupposes the existence of a relationship and an exchange as the outcome of a process of becoming initially more aware of one's own culture and subsequently of different cultures through comparison and emphasis of both similarities and differences, the latter to be viewed and valued with deeper understanding (Carter, 2008). Intercultural competence needs to become a skill, next to the classic language skills (reading, writing, listening, speaking), and can, indeed must be developed as such in class in order to meet the requirements of increasingly interconnecting world citizens.

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[12] For example the scene of the business lunch between Totò and Peppino de Filippo from the movie *Totò Peppino e i fuorilegge* [https://www.youtube.com/watch?v=_-aDetybz6Y (23.03.2015)], or a passage from De Crescenzo, Luciano. *Così parlò Bellavista. Napoli, amore e libertà,* Milano: Mondadori, 1984, 136 to 137. For further developments see Appendix.

At the same time, valuing one's own and the other's culture is an educational practice in itself, indirectly leading us and our learners to acknowledge human rights and foster cultural democracy. We teachers are educators and have a responsibility in modelling the members of current and future societies through the development of a competence which also includes cross-curricular proficiency in adaptability. In other words, given the internationalization and subsequent interdependence of societies, we need to stimulate cultural intelligence and implement the "education for tolerance" recommended by UNESCO (1995:9) as a means to quvdevelop capacities for independent judgement, critical thinking and ethical reasoning […], with a view to educating caring and responsible citizens open to other cultures, […] respectful of […] differences.

5   Appendix

One of the Italian classes in Austria had the opportunity to develop the topic in 3.2.2. during a workshop held at the Roman Philology Department of Salzburg University on 29 October 2012. The speaker, Ms Chiara Petrò, at the time was Head of Business Relations between Italy and German speaking areas in Europe for the Italian Trade Agency based in Milan. In her workshop "Italy as a trade country between the past and the future: new global challenges" (L'Italia dei commerci tra passato e futuro: nuove sfide globali) she highlighted the importance of intercultural awareness for executives in approaching otherness in order to cope positively with cultural differences occurring during 'critical incidents' (cf. Schumann, 2012), thereby promoting mutual business and cooperation. The students presented their activities related to *A Business Lunch* and in the ensuing discussion saw their results being reinforced. The workshop was indeed an excellent way to connect in-class activities with the real world outside.

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Bionote

Anila R. Scott-Monkhouse, e-mail: anila@unipr.it, Centro Linguistico di Ateneo (UOS Abilità Linguistiche, Università di Parma).
Anila teaches English at Parma University (Italy), is an examiner for Cambridge ESOL, and has been a teacher trainer in Italy and the Czech Republic. Her interests lie in learner training and Gardner's theory of multiple intelligences.

Enrica Rigamonti Permanschlager, e-mail: enrica.rigamonti@sbg.ac.at, Universität Salzburg – Fachbereich Romanistik
Enrica teaches Italian Language and Culture at Salzburg University (Austria), and has also been involved in teacher training. She is interested in promoting intercultural understanding through language.

A Multimodal Approach in the Classroom for Creative Learning and Teaching

Lorena Marchetti and Peter Cullen

Abstract: A multimodal approach in the classroom can be a source of creativity for both teachers and students. It draws upon available visual, audio, and kinaesthetic modes and does not necessarily rely on technology. This paper will briefly define what modes are and outline the origins of multimodal studies in the New London Group (1996). Through a multimodal lesson using video, we can identify modes and how these correlate not only to contemporary society but to specific cognitive processes. This combination allows for creativity and flexibility in teacher-student interaction and can enhance the learning environment.

This paper considers the work of Kress and Jewitt and their research in multimodal studies, and applies these concepts to higher education and the undergraduate experience in second language learning. It focuses on the combination of text, audio and image as individual modes and how these can be creatively combined to produce meaning, encourage interaction and learning in the classroom. Engaging students in course content requires strategies of communication that a) focus and maintain attention, and b) work past the simple cognitive styles of information recognition to activate deeper forms of memory creation. Multimodal approaches tend to do this naturally and as the research results demonstrate, the students responded favourably to multimodal input. The majority of students preferred visual stimulus or a combination of visual and text stimuli for acquiring new lexis and for enhancing oral production.

Key words: multimodality, communication, language learning, cognitive interaction

Abstrakt: Dieser Beitrag gibt eine kurze Definition der Modusformen (Modi) und umreißt dann die Ursprüngen der multimodalen Studien der New London Gruppe (1996). Durch eine multimodale Vorlesung mit Video können die Modi, sowie ihre Korrelation mit der heutigen Gesellschaft und insbesondere mit spezifischen kognitiven Prozessen, identifiziert werden. Diese Kombination ermöglicht Kreativität und Flexibilität in der Lehrer-Schüler-Interaktion sowie eine Verbesserung der Lernumgebung.

Abstrakt: Multimodální přístup ve třídě může být zdrojem kreativity jak pro učitele, tak pro studenty. Čerpá z dostupných vizuálních, audio a kinestetických módů a nespoléhá nutně na technologii. Tato studie stručně definuje, co to jsou módy, a shrnuje počátky multimodálních studií v New English Group (1996). Prostřednictvím multimodální lekce používající video můžeme identifikovat módy a jejich vztah nejen k současné společnosti, ale i ke specifickým kognitivním procesům. Tato kombinace umožňuje kreativitu a flexibilitu v interakci učitel–student a může zlepšit studijní prostředí.

Tato studie posuzuje práci Kresse a Jewitta a jejich výzkum v oblasti multimodálních studií a aplikuje tyto koncepty na vyšší vzdělávání a zkušenosti studentů při učení se druhému jazyku. Zaměřuje se na kombinaci textu, poslechu a obrazu jako jednotlivých módů, a ukazuje, jak mohou být tyto kreativně kombinovány za účelem poskytnutí významu a podporování interakce a studia ve třídě. Zapojení studentů do tvorby obsahu kurzu vyžaduje komunikační strategie, které 1) zaměří a udrží pozornost, a 2) přesahují jednoduché kognitivní styly rozpoznávání

informací za účelem aktivace hlubších forem paměťového procesu. Multimodální přístupy toto dělají většinou přirozeně, a jak výsledky výzkumu ukazují, studenti na multimodální výuku reagovali příznivě. Při získávání nové slovní zásoby a zlepšení mluveného projevu dávala většina studentů přednost vizuálnímu stimulu nebo kombinaci vizuálního a textového stimulu.

Introduction

This paper argues that a multimodal approach can enhance the classroom experience by improving interaction between teachers and learners, learners and input materials, and classroom communication in general. Ensuring fluid interaction and optimizing communication by appropriate selection and combination of modes by the teacher provides a framework for creative learning. Particularly in the case of second language learning in university contexts, this offers a springboard to satisfy all learning styles and cognitive differences, as well as to achieve individual and general aims and objectives. We begin by defining a few different modes, discussing the origins of the multimodal approach and develop the argument with results from research carried out on Italian undergraduate students. The example of a multimodal lesson using video, lends itself to identifying the modes used by teachers and students and how these correlate not only to contemporary society but to specific cognitive processes. This combination (use of multiple channels) allows for creativity and flexibility in teacher-student interaction and can enhance the learning environment. The issues at stake are: the impact of our multidisciplinary twenty-first century, the evolution of communication within and outside of the classroom, interaction including and consciously considering modes employed and how these affect learning and the cognitive process of language acquisition. Parallel issues are multiliteracies and the contribution of recent neuro-cognitive research.

What are modes?

Underlying a multimodal approach are *modes*, which are visual, audio, text or speech, and movement channels used in a classical classroom situation. There is nothing revolutionary about multimodality. Historically, communication has always involved different modes, but what has changed and is in evolutionary flux is communication in society at large. Through technology induced interaction and connectivity, multimodality provides resources that challenge traditional forms of communication and even language itself.

In the last few decades, the most noticeable shift has been from page to screen (Kress, 2010, p. 6), for example from chalk to PowerPoint, greatly influencing design and selection of resources. Research has documented changes in school textbooks (Kress, 2010, p. 47), and evidence shows how images in 1930s textbooks were used to supplement the text, while today 'image' is the 'carrier' of meaning. These changes occurred without strong influences from digital technologies whereas today's scenario is marked by multimedia images, and many modern textbooks contain links to online

and supplementary digital material (see Appendix A for a selection of ELT textbooks). In addition, it is not unusual for institutions to have digital facilities in the classroom. As the British Council has found, '...new technologies such as overhead projectors, interactive whiteboards, laptop computers and wireless internet have opened up the classroom to the outside world'. (Peacock 2013 p.2). The full impact of these technologies and computer mediated learning cannot be dealt with in this paper, although some reference to this field will be discussed.

Changes in communication inevitably lead to changes in language and require the language teacher to be aware of and contemplate the implications of these complex phenomena. A multimodal approach is complex indeed, due to its interdisciplinary nature, drawing on diverse fields of enquiry such as educational history, sociolinguistics, design and perhaps primarily social semiotics. In Jewitt's (2006) examination of classroom communication, she claims that it is not technological resources alone, but the interrelationship and interaction with multimodal semiotic resources that make the difference in the learning situation by providing effective input to stimulate communication. Investments and technological resources have increased the potential offered to teachers for selecting input materials but require careful re-thinking of the learning process, which is still based on the traditional view of literacy centred on oral and written language. (Jewitt, 2006).

Crucial to an understanding of multimodal studies is interaction not only between teachers and students but also with input materials, the classroom environment and external and abstract factors such as students' cultural background, identity, and relationships with the external world.

Historical background

The origin of the terms *multiliteracies* and *multimodality* was established in a seminal article by The New London Group (1996), who discussed how changes in communication sparked by new technologies urgently needed to be addressed regarding teaching and learning through conventional print-based media:

> The authors argue that the multiplicity of communications channels and increasing cultural and linguistic diversity in the world today call for a much broader view of literacy than portrayed by traditional language-based approaches. (The New London Group, 1996, p. 60).

The central argument was to consider future requirements of their contemporary society in a globalized world and the place of literacy. They consider education as a 'mission' to provide students with the necessary skills and benefits, opening equal opportunities and access to their chosen paths in society. (The New London Group, 1996, p. 60). Their view of traditional literacy, relying on the printed text, was as a limited and restrictive approach and they saw the necessity to expand to new forms in order to engage students and face all available resources, to 'account for

the burgeoning variety of text forms associated with information and multimedia technologies'. (The New London Group 1996 p.61). More recently, Kress and Van Leeuwen analysis of language and visual communication claims that essential skills are not being taught in institutions – and as far as visual literacy is concerned, they produce 'illiterates'. (Kress and Van Leeuwen, 2006, p. 17).

One of the crucial relationships discussed is that of text and image, which during the 1990s was cause of anxiety among educators and is even more relevant to today's communicational landscape. At that time, debates on language and literacy claimed the primacy of grammar and classical literature, while changes and exchanges in cultural and linguistic heritages were ongoing. Hailing from different academic experiences and representing the international English speaking world, The New London Group was intent on finding equitable solutions to pedagogy for future students despite the complexities of contextual reality. They agreed on the social basis of language learning and acknowledged the cultural and linguistic changes that were taking place. They decided upon the term multiliteracies as a development away from traditional language based literacy. 'A pedagogy of multiliteracies, by contrast, focuses on modes of representation much broader than language alone' (The New London Group, 1996, p. 64). A major issue was to make a contribution through pedagogy to empower learners with necessary qualities to fit in with ever-changing social demands. Particularly significant were cultural diversity and the resulting multilingual societies and the changing role of citizenship within this society. The authors claimed that consideration of the future was essential and viewed each individual as having a 'lifeworld'. (The New London Group, 1996, p. 64).

The New London Group considered the classroom a good place to develop communication and awareness of discourse practices, providing real opportunities for students to express their individual cultural experiences while building on their linguistic resources so they could become active participants and interact with the social context, whether it be a work or private context (The New London Group, 1996, p. 69). Social semiotics emphasizes the social context of communication and how meaning is shaped through an individual's choice of resources whether text, image or a combination of resources. The focus is on the process rather than on the system. Kress answers the question of why people make their choices (2010) in the concept of *'interest'* and how this leads to choices of which mode to foreground in a specific instance and how these decisions are embedded in social and cultural origins.

A Multimodal Video Lesson

The example of using video in the classroom encompasses a variety of modes, primarily visual, and can exclude or include text as required by the teacher and dependent on the teacher's choice. There is also great choice available in the audio or speech modes, and finally the mode of movement which occurs within the video. For example, there is an exciting possibility offered by kinetic typography, which is a combination of

text, movement, sound with or without image (see appendix B for a small selection of video links). The teacher's conscious decision in selecting and evaluating material is fundamental in the development of critical awareness of the visual media by both teachers and students alike.

The video chosen for the sample lesson featured several crucial input characteristics, exemplified in the visual, text and audio modes. (See https://www.youtube.com/watch?v=B11kASPfYxY) The visuals were social semiotic icons, easily recognizable by a large audience, using very little text but providing prompts and enough background factual information to state the argument clearly, coupled with a lively, cheerful tune attracting and maintaining attention throughout the minute or so length of the video. The importance of the choice of suitable input material ultimately lies with the teacher but can easily be extended to students, who can participate in choosing suitable materials with the teacher's guidance. Interest and purpose are essential ingredients and necessarily ought to fit in with curricula and institutional requirements as well as immediate and long-term objectives. The above chosen example of video was used effectively for teaching English as Second Language to business students in Italian universities on different occasions, both at B1 and C1 level, by varying tasks accordingly. (See appendix C).

Research in an Italian University ESL Class

To test multimodal effectiveness in the Italian case, the authors surveyed a sample of 60 students registered in first, second and third years of a business language course in an Italian university. Each cohort consisted of approximately 20 students. Data was collected using a structured questionnaire of 20 questions relating specifically to students' preferences for in-class spoken interaction channels as well as their general communications preferences. Questions related to use of text, image, audio, proxemics and combinations thereof applied in spoken interaction during language lessons.

The results illustrated students' preference for learning new language from image prompts. As seen in Figure 1, the majority of students preferred to connect vocabulary to a picture or image, or to a combination of text and image. Figure 2 reinforces the above-mentioned student preferences for the role of video and the visual stimulus in making it easier to participate in speaking activities in class.

Figures 3 and 4 illustrate students' individual communication habits, both inside and outside the classroom. Although face to face communication was by far the most popular, it was closely followed by communication through a variety of technological tools. As shown in Figure 4, a modern use of connectivity which was not included nor intended as part of the lesson, nonetheless interestingly made a positive contribution to classroom activity. How can we account for this type of flipped-classroom input?
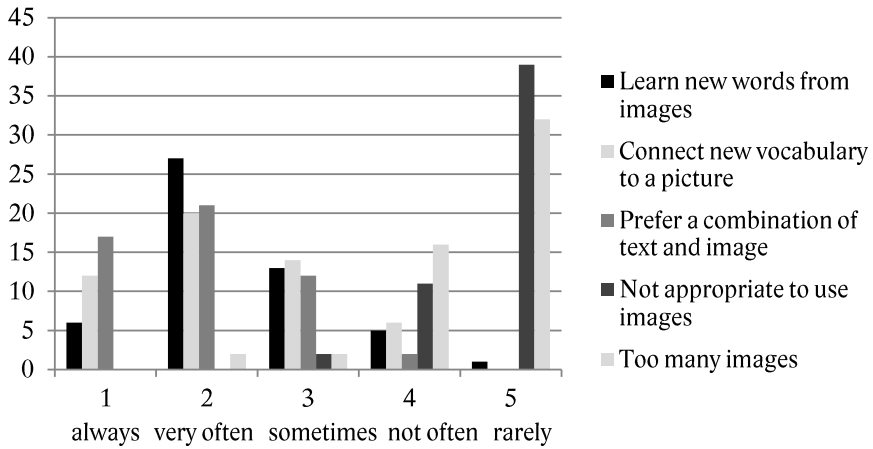
Fig. 1: *Student preferences with images*
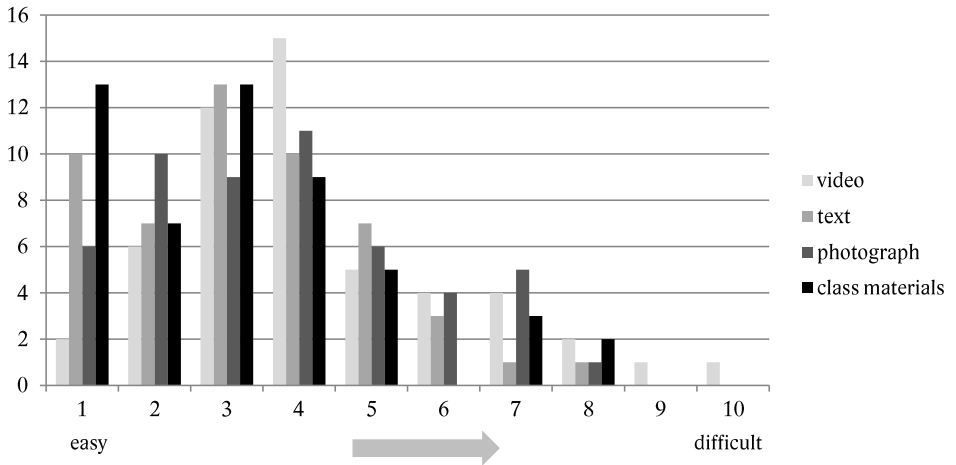
Fig. 2: *Student preferences for speaking prompts*

Neural psychology and the creative act of thought

To understand the composite nature of attention and therefore stimulus with respect to students' classroom experiences, including spontaneous student connectivity, it is useful to consider the literature on learning and its foundation in brain processes. Over the past 20 years or so a great deal of literature has accumulated across a variety of fields that seem to point to an initial convergent understanding of how knowledge
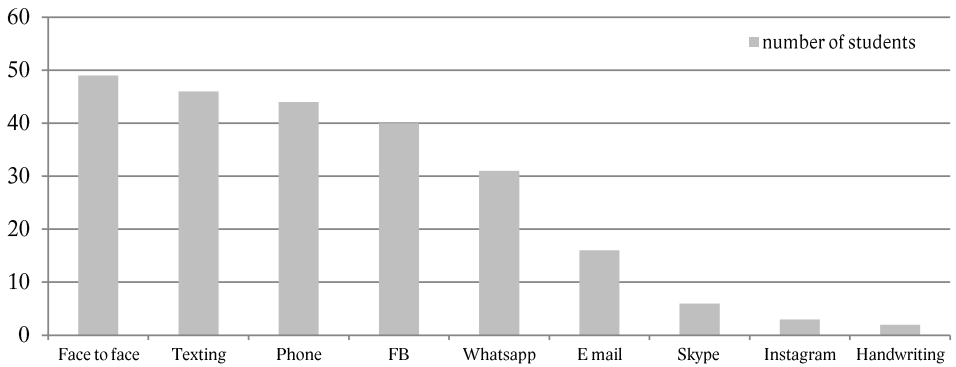
Fig. 3: *How do you communicate outside class?*

Look up a word in dictionary

Look up extra information

Check what teacher said

Chat with friends on FB/Whatsapp

e mail
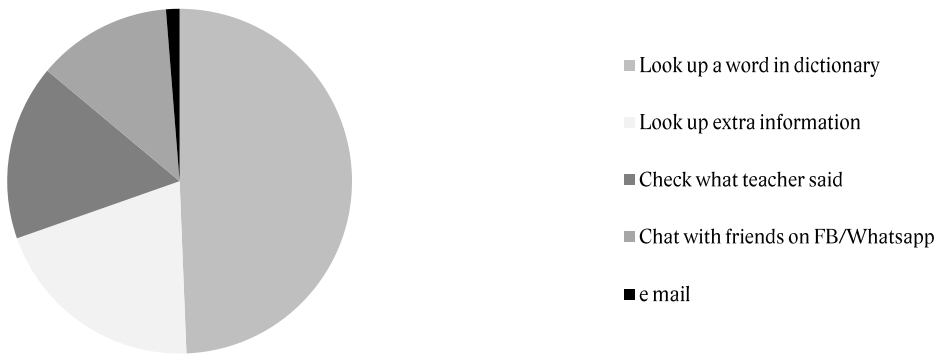
Fig. 4: *Using Internet in class*

is acquired and maintained in memory. Differently from past models based on innate or inherent capacities and systems, research in neurology, cognitive psychology, cultural psychology and language evolution seem to suggest that knowledge and competence is much more constructed, immediate and plastic than previously thought. It is the process and not the product that counts.

In the 1980s, Eric Kandel had already suggested that memory itself is based on the chemo-electric ability to maintain stimulated chemical synaptic transmitters in short-term memory or convert them into gene-expressions that result in the replication of synaptic connections, in effect resulting in the creation of a long-term memory – at least in the snail Aplysia (Kandel, 2006). The results of Kandel's work, and of other researchers in that field, demonstrate that the basic foundation of any knowledge – a memory, is in fact a plastic physiological system rather than a static object. What is more, neuroscience has demonstrated quite clearly that each component of a concept or perception actually represents a seemingly immediate reconstruction of

a number of different types of synaptic memories. What Lakoff and Johnson (Lakoff and Johnson, 1999), or Fauconnier and Turner (Fauconnier and Turner, 2002) would call frames or conceptual binding, actually reflects the ability of the brain to compose a perception, thought or reflex from disparate channels of memory stored in different areas of the brain. For example, in order to take a single step, the brain must put together a series of learned visual memories regarding vertical and horizontal spatial relationships with somatosensory memories regarding the concepts of weight and impact, friction and traction etc. Walking is most definitely learned and is not innate, although the body is equipped to perform that action. The physiology of the brain, but also of the body in general has serious implications for how academics today should view learning, and in particular language learning.

Specifically in terms of language, however, a few issues emerge. First, language may be considered one of our first human institutions. This is an important consideration when arguing that multi-modal learning is fundamental to effective classroom teaching. As Lakoff would argue, a classroom is itself a set of institutionalized frames that shape perceptions, concepts and expectations – indeed, these create the very heuristics of classroom behaviour. It is useful to consider that language itself is likely a by--product of multimodal and constructional processes of memory and communication. Martin Sereno argues that language originated due to the combination (mapped in the brain) of vocal control systems with semantic visual systems *that evolved in relation to other functions long before language* (Sereno, 2005). The very memories that allow us to construct a single syllable are a combination of somatosensory vocal control and audio perception. They acquired meaning, according to Sereno, when these memories (synaptic connections) connected with visual cortex memories – exponentially increasing the brain's capacity to form connections around new, and often internally constructed concepts. Sereno's secondary point was that languages did not develop because they were useful or needed, but rather because initially we liked them. As a later-to-become symbolic set of sounds, they became pleasing for us to use and functioned in terms of sexual selection. John Searle has done a great deal to show that our institutional behaviour in fact is constituted by our linguistic ability to compose concepts creatively and then communicate them as declarative or intentional (Searle, 2006) A teacher is only a teacher because we declare the role to exist, otherwise a teacher's communications amount to just advice.

The institutional aspect of language is important. As in the example of a classroom, institutions are things that we perceive but that only exist as convergent forms of interaction between multiple people and objects, in certain places at certain times. Terence Deacon, we think usefully, challenges us to reconsider our object-centred approach to understanding of what something *is* specifically by considering that it might *only exist* in terms of relations (Deacon, 1997; Deacon, 2012). Gravity is an example of this, so is marriage, so is an ECFL B2 language level. Deacon suggests that language is another example of something, including the learning of the thing, that ex-

ists only as a system of relationships. This makes sense in terms of the neural patterns of memory, and therefore, of language development – whether at the evolutionary or the individual learning level.

If language exists solely as a series of relationships that access various functional areas of the brain to create compositional realities *at the time they are stimulated or needed* it becomes at least dysfunctional if not impossible to objectify them. If languages were really products of a static system in the brain, they would take genetic evolutionary scales of time to evolve. They don't. There are some implications for teaching.

Multi-media and multi-modal tools are approaches to help students' brains function better in relation to the information upon which they are required to work. It is important to remember that all aspects of a classroom present perceived visual, audio and somatosensory stimuli to the student *at the same time* their own memories and physical states create internal distractions – hunger, uncomfortable chairs, cute peers, homesickness, etc. A classroom, a teacher, and a set of instruments and peers are all part of the sensory field. To help students attend to new information, it is useful to create a variety of stimuli channels to which they can attend, often accessing different channels at different times over the course of a lesson or assignment. Each channel allows the student to connect any given concept to a different aspect of sensory memory.

Conclusion

To conclude, we can confirm recurring issues which are certainly the complexity and interdisciplinary nature of the field, the influence of changing communicational landscapes, and how these in turn impact on language and education. 'Changes in the contemporary communications environment simply add urgency to the call to consciously deploy multimodality in learning' (Cope and Kalantzis, 2009, p. 181). Our study showed Italian students' preferences for a multimodal approach in the classroom. Students perceived enhanced learning experience through the association of images and external audio to spoken interaction. This produced a creative learning experience and increased the efficiency of language acquisition. Further research should corroborate these findings with actual formal evaluation results. Adopting a multimodal approach with conscious and critical awareness of how and what is being presented as input material, together with a flexibility and willingness to interact in the classroom microcosm can indeed lead to fruitful and creative learning.

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Appendix A: ELT text books

Cambridge University Press				
Year	Title	Interactive/online resources	Publisher's comment	Level
2010	English Unlimited	Online workbook, IWB software, CD, DVD	"The online workbooks allow students to collaborate and communicate, and... They offer a classroom without walls for schools that wish to take their teaching into the digital age."	A1–C1
2013	Face2Face	Online workbook, IWB software, CD, DVD	"The Classware software brings the whole package of book, audio and video together on one disc, providing the perfect bridge between teacher-led instruction and student-focused learning."	Beginner to Advanced
2012	Business Advantage	Extra online activities, Videos, CD, DVD	"The dynamic web support offers new and updated activities which give students a fresh, dynamic approach to the learning process."	Intermediate to Advanced
Oxford University Press				
2012	New Headway Digital	Online resources bank, students' and teachers' web sites	"This course offers a consolidated methodology enhanced with state of the art digital components and carefully selected literature and culture lessons to better motivate and engage today's learners."	Elementary to Intermediate
2009	English File Digital	Online resources bank, students' and teachers' web sites and apps for mobile devices	"Improved throughout with brand new digital components to use inside and outside the classroom. English File Third edition – the best way to get your students talking."	Elementary to Intermediate
Macmillan				
2012	Global digital	Global resources and blog	"*Global* is a true multimedia course, with a range of digital components fully integrated into its structure."	Beginner to Advanced
2009	New Inside Out	Online practice, IWB, CD, DVD	"Digital version of the Student's Book is visible on screen, allowing you to combine traditional book-based learning with the multimedia features of the digital version."	Beginner to Advanced
2014	Improve your IELTS	Online practice	"This book prepares students through pronunciation focus, test questions and two audio CDs, along with MPO for further practice online."	IELTS 4.5–6
2013	The Business 2.0	eWorkbook with audio, video and downloads, Internet research tasks	"...contains material to support and enhance the activities in the Student's book"	B1 to C1

Appendix B: Links to videos

minute	link	title
1.05	https://www.youtube.com/watch?v=sbvFoX5lG9o	I love NY type in motion
1.01	https://www.youtube.com/watch?v=LHhJSz6yk6U	Let's end poverty now
0.50	https://www.youtube.com/watch?v=YC-lVNdf538	My dear, dear man – The King's Speech
2.07	https://www.youtube.com/watch?v=L37Pobne4tU	The Macmillan dictionary is going places
6.34	https://www.youtube.com/watch?v=J7E-aoXLZGY	Stephen Fry – Kinetic typography
1.24	https://www.youtube.com/watch?v=mToZnIVCwAs	Shakespeare Sonnet 116

Appendix C

Ideas for developing a lesson at level B1

1 – PRE VIEWING

- With a partner make a list of countries in the world. Or brainstorm on blackboard/ whiteboard.
- Which countries are rich/poor?

2 – FIRST VIEWING

- Gist question – what is the topic of the video? What does the video show?

3 – SECOND/(MULTIPLE) VIEWING

1. What happened in 1992?
2. What did they discuss?
3. What happened in 1997?
4. What did they sign?
5. Why did they sign it?
6. Why did some countries refuse to cut?

4 – FOLLOW-UP

- In pairs or small groups talk about the political events regarding the problems presented in the video.

(Teacher – highlight past tense verbs – met, discussed, signed, refused, cut, agreed /disagreed, got richer/became wealthier, caused, paid)

Writing – write a short history of climate change negotiation

Ideas for developing a lesson at level C1

1- PRE VIEWING

- What are your ideas on geo-political relations regarding climate change? Which countries are involved?

2 – FIRST VIEWING

- Watch and note the main events. Discuss the importance of these with your partner.

3 – SECOND VIEWING

a) Watch and make notes.
b) In groups compose 3–5 questions to ask the other groups.

4 – FOLLOW-UP

- Role play – divide the class into rich and poor countries and simulate climate change negotiation.
- Discussion – debate the current situation and discuss environmental sustainability.

Bionote

Lorena Marchetti, e-mail: lorenamarchetti3@gmail.com, University of Urbino.
Lorena Marchetti, 20 years ELT experience in UK, Spain and Italy, where I currently teach at Urbino University. MA in Applied Linguistics and TESOL, led to research in multimodal approaches to teaching and learning.

Peter Cullen, e-mail: Peter.cullen@uniurb.it, University of Urbino.
Peter Cullen, BA MA Dalhousie University, Canada, PhD University of Bari. I teach business language at the University of Urbino. Research: cultural psychology, didactics, history.

Personalisierung des Fremdsprachenlernens als besondere Lernoption

Irena Zavrl

„Man kann einem Menschen nichts beibringen,
man kann ihm nur helfen,
es in sich selbst zu entdecken.“

(Galileo Galilei)

Abstrakt: Bei den zahlreichen Diskussionen über die künftige europaweite Bildungsentwicklung rückt das Ziel der „Personalisierung des Lernens" zunehmend in den Mittelpunkt und bildet daher auch eine logische Komponente des OECD-Programms „Schooling for Tomorrow". Die Fokussierung auf Bildungskonzepte für die Zukunft geht auf die Erkenntnis zurück, dass bestehende gegenwärtige universal einsetzbare Standardlernkonzepte im Sprachunterricht weder den Bedürfnissen des Einzelnen noch denen der heutigen wissens- und leistungsorientierten Gesellschaft insgesamt wirklich gerecht werden.

Schlüsselwörter: Personalisierung des Lernens, Individualisierung des Lernens, Zukunftsbildungskonzept beim Fremdsprachenlernen

Abstract: Due to several discussions about „Personalising Education" within the OECD Programme „Schooling for Tomorrow" there is a growing awareness of the fact that one-size--fits-all, i.e. universal and classical approaches to foreign language knowledge management, distribution and organization are ill-adapted and inadequate both to individuals' needs and to the knowledge society at large. To move beyond uniform, mass provision can be described more widely as „personalisation" of education or learning of foreign languages.

But personalisation can mean many things and raises profound questions about the purposes of and possibilities for language education and learning.

Key words: Personalising Education, Individualising Education, Teaching of Foreign Languages for Tomorrow

Abstrakt: Díky několika diskuzím o „personalizaci vzdělání" v rámci programu OECD „Vzdělání pro zítřek" si stále více uvědomujeme, že princip „jedna velikost padne všem", tj. univerzální a klasické přístupy k řízení znalostí, distribuci a organizaci cizího jazyka, jsou špatně přizpůsobené a neadekvátní pro potřeby jednotlivce i znalosti společnosti jako celku. Posun za hranice uniformní, masové výuky může být ve větší šíři popsán jako „personalizace" vzdělávání či studia cizích jazyků.

Avšak personalizace může znamenat mnohé a dává vzniknout závažným otázkám ohledně účelů a možností jazykového vzdělávání a studia.

1   Einleitung. Viele Modewörter und eine (un)klare Begrifflichkeit im Bereich der Lernformen: Individualisierung – Differenzierung – Personalisierung

Viele Modewörter (E-learning, interaktives Lernen, Online-learning, Online-teaching, digitales Lernen, autonomes Lernen, hybrides Lernen, Fernlernen, Präsenzlernen, (voll)virtuelles Lernen, Selbstlernen, peer-learning, digitales/digitalisiertes Lernen, kombiniertes Lernen, Lernen on demand, Einsatz von digitalem Lernmaterial....) sind tagtäglich in aller Munde, aber: bringt die Digitalisierung der Medien tatsächlich so viele Änderungen für den Sprachunterricht mit sich, wie manche in der Euphorie der ersten Stunde mein(t)en? Oder haben Skeptiker Recht, die eher auf didaktische Rückschritte hinweisen und vieles von dem angeblich Neuen für Heißluft halten? (Rösler, 2010)

Es ist allerdings mehr als umstritten, ob die Digitalisierung tatsächlich den Sprachunterricht verbessert. Man braucht gar nicht den Thesen des Hirnforschers M. Spitzer zu folgen, der behauptet, E-learning behindere die kreative Entfaltung und Bildung der Schüler und führe zu schleichendem Gedächtnisverlust und zu digitaler Demenz. (Spitzer, 2012)

Was versteht man eigentlich unter diesen zahlreichen Bezeichnungen von Lernformen mit Modewörtern?

Das amerikanische Department of Education (**ED** or **DoED,** Radin 1988), hat drei, meiner Meinung nach sehr gelungene und treffende Definitionen veröffentlicht:

Klassisches Fernlernen ist ein typischer Vertreter von individualisiertem Lernen, wo die Lernziele für alle Lernenden die gleichen sind und die Lernenden mit ihrer eigenen Lerngeschwindigkeit und gemäß ihren eigenen Bedürfnissen die Lernmaterialien bearbeiten können. Auch Blended Learning, bezeichnet als hybrides, kombiniertes bzw. verteiltes Lernen, wo Präsenzlernen und virtuelles Angebot synchron oder konsekutiv stattfinden und die Teilnehmenden gewisse Freiheiten in der Lerngeschwindigkeit und in der Lerntiefe haben, gehört zum individualisierten Lernen.

Beim **differenzierten Lernen** sind die Lernziele für alle Lernenden ebenso die gleichen, jedoch unterscheiden sich die Lernmethoden, mit denen der Lernende das Lernziel erreichen soll(te). So kann sich zum Beispiel der eine Lernende die Inhalte am Besten in den klassischen Sprachkursen aneignen, während der andere lieber auf Web Based Trainings zurückgreift und der dritte am liebsten mit Lernskripten und CDs lernt. Differenziertes Lernen ist somit von der Entwicklung her sehr (zeit- und kostenintensiv) aufwändig, da dieselben Lerninhalte auf unterschiedliche Weise vorbereitet und angeboten werden müssen.

Am stärksten fokussiert sich hingegen an die Lernenden **das personalisierte Lernen**. Da gibt es keine allgemeinen Lernziele, sondern Lernziele, Lerninhalte, Lernge-

schwindigkeit und Lernergebnisse, die ganz eng maßgeschneidert auf die Bedürfnisse des Lernenden abgestimmt sind. Beim personalisierten Lernen ist ein hohes Maß an Selbstlerndisziplin, Selbstorganisation und Selbstlernkompetenz des Lernenden erforderlich und auch die Rolle des Trainers oder Lehrers ändert sich spürbar: der Lehrende ist kein Belehrender, kein Wissensvermittler, sondern wird zum Lernbegleiter und Lerncoach, der nicht nur den Lernprozess begleitet, sondern auch die Begabung, Potenzial und Selbstlernkompetenz des Lernenden zu fördern und zu motivieren versucht (Fassnacht, 2014).

Zu welchem Zeitpunkt welche Art des Sprachunterrichts eingeschaltet wird, hängt von zahlreichen Faktoren ab, die wir uns gründlich von Vorhinein überlegen müssen. Der Einsatz von digitalen Medien ist nur sinnvoll, wenn er didaktisch gerechtfertigt und begründet ist und Mehrwert im Sprachunterricht schafft. Wichtig ist, dass digitale Medien funktional und zielgerichtet aufgaben-, lerner- sowie kontextspezifisch eingesetzt werden und nicht einfach nur aus dem Grund, weil es zeitgemäß trendig ist oder weil man über sie verfügt oder weil man Kosten sparen möchte.

Sobald man zum digitalen Lernen jeglicher Lernform zurück greift, sollte man sich der Tatsache bewusst sein, dass vieles nicht per Mausklick oder Knopfdruck funktioniert und dass bei jeder Form des digitalisierten Lernens die sozialen Komponenten (peer learning, kooperatives Arbeiten und vor allem Erlebnisqualität beim Sprachenlernen) fehlen, wo die Lernenden von anderen Lernenden (und auch vom Lerncoach) in der Präsenzphase enorm viel profitieren. Vorwiegend mangelt es auch an dem Motivationsschub, an Förderung der Lernfreude und am Aufbau der relevanten Lernkompetenz, die meistens vom Lehrer ausgehen und durch Gruppe gestärkt werden.

2   Die neue Kultur des Lehrens und des Lernens: Von der Individualisierung über Personalisierung zur Generierung

Der Begriff **„Personalisierung des Lernens"** als ein Leitprinzip einer auf „Humankompetenz" ausgerichteten Pädagogik (Schmid, 2008) ist ein sehr dehnbarer Begriff. Es stellen sich immer wieder grundlegende Fragen

- nach dem Sinn und Zweck der Personalisierung des Sprachlernens
- nach den Möglichkeiten für die Bildung im Allgemeinen und besonders für den Sprachunterricht
- nach der Eignung und didaktischer Sinnhaftigkeit für den Sprachunterricht
- nach der Gestaltungsart und -weise des Sprachunterrichts
- nach dem zeitlich günstigsten, mehrwertschaffenden oder nützlichsten Einsatz von digital-support.

GENERIERUNG

* autonom
* selbständig

PERSONALISIERUNG

* selbstbestimmend
* selbstgesteuert

INDIVIDUALISIERUNG

* fremdgesteuert
* einheitlich für alle
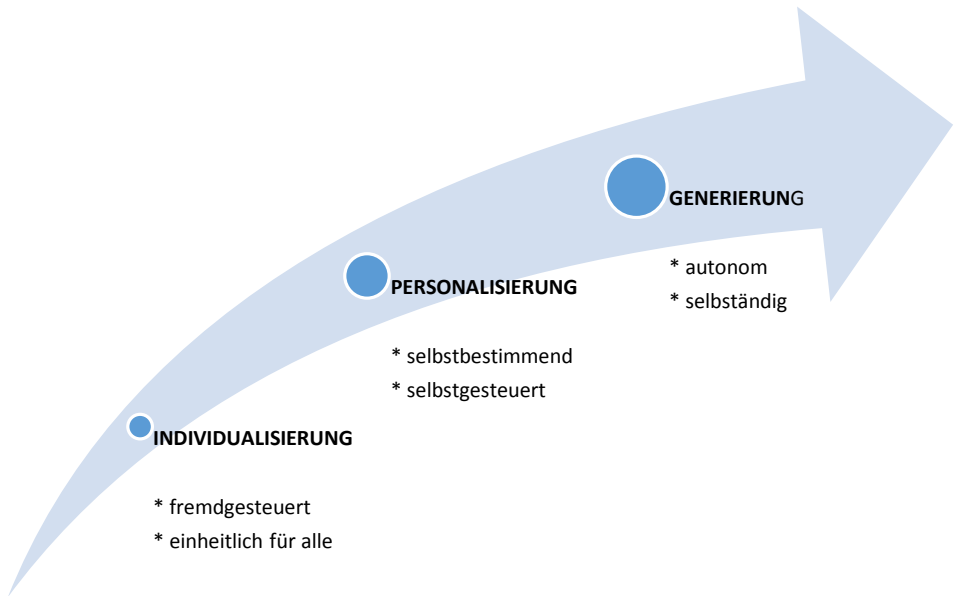
Abb. 1: *kontinuierliche Entwicklungskette: von Individualisierung über Personalisierung zur Generierung*

Die am Lernenden ausgerichtete Personalisierung des Lernens heißt, für die Lernenden im Sprachunterricht optimale Voraussetzungen und Rahmenbedingungen zu schaffen und die Lernziele, Lerninhalte, Lerngeschwindigkeit und Lernergebnisse ganz eng auf die Bedürfnisse des Lernenden abzustimmen, um ihn möglicherweise fit für sein Leben in einer fremdsprachlichen und kulturell anders geprägten Umgebung zu machen. Das heißt: **Lernen on demand,** wo mit professionell gestalteten zielgenauen Lehrwerken gearbeitet wird und die Lehrmaterialien punktgenau auf den Sprachstand, Sprachbedürfnisse, Lernkompetenz und Lernpotenzialedes Lernenden zugeschnitten werden.

In der heutigen schnelllebigen Welt sollte man sowohl die notwendigen Fähigkeiten haben, um im Berufsleben Fuß fassen zu können als auch die Methodik bzw. Fähigkeiten dafür, sich **selbständig und autonom** in der Generierungsphase, wo der lernende Betroffene zum Beteiligten wird, lebenslang etwas Neues anzueignen: **weil nur wer gelernt hat zu lernen, wird sich neues Wissen aneignen, altes erhalten und vieles generieren können.**

Vom Individuum zur Person: auf die einzelne Person orientierte Sprachunterrichtsentwicklung

Beim individualisiertem klassischen Fernlernen oder kombiniertem Blended Learning werden den Lernenden gewisse Freiheiten in der Lerngeschwindigkeit, Lernumfang

und in der Lerntiefe eingeräumt. Und gerade diese Fernlehrmethoden soll man beim Sprachunterricht Schritt für Schritt, sporadisch und mit großer Sensibilität einsetzen, da sie sich im Fremdsprachenunterricht **erst eignen und bewähren,** nachdem die Lernenden in den gemeinschaftsbildenden Anfängersprachkursen ihr allgemeines Sprach- und Kommunikationsbasiswissen erworben haben, nachdem sie genügend Unterstützung und Motivationspusch zuteil waren, nachdem der Sprachunterricht klar strukturiert verlief, nachdem gezielt und genügend Hilfestellungen gegeben und Lernprozesse klar strukturiert gelebt wurden und nachdem den Lernenden nachvollziehbare Lernorganisation bzw. Selbstlernkompetenz in genügendem Ausmaße präsentiert und vorgelebt wurde. Sobald man den Sprachunterricht digital zu führen oder zu unterstützen versucht, muss man im Auge behalten, dass man bis dahin auch gewisse Eigenschaften des Lernenden evozieren sollte: und zwar vor allem Selbstlernkompetenz, Selbstlerndisziplin gepaart mit der Fähigkeit zu Selbstorganisation, hohe Medienkompetenz (in digital-technischem und medienkritischem Sinne) und hohe Schreibkompetenz, da in dieser Phase bei der „internetgestützter schriftlichen Kommunikation gar keine sprachliche Korrektheit mehr erreicht wird." (Rösler,2010)

Personalisiertes Lernen ist zu verstehen „von Personen – mit Personen – für Personen" auf der personalen und interpersonalen Ebene von-mit- und-für-einander lernen und setzt ein persönliches Mit- und Füreinander von dem Lerncoach und Lernenden voraus, wobei es im Sprachunterricht vor allem um Begabungs- und Motivationsförderung geht. „Dialogue is a central element to the personalization" (Radin, 1988), um später als Selbstlernende in der Lage zu sein, zum generierendem Lernen zu gelangen, d.h. zur Förderung der Selbstwirksamkeit und zum Generieren des Lernens: es geht einfach darum, sich für das lebenslange Lernen ausreichend vorzubereiten und der eigenen Wirksamkeit bewusst zu werden: nämlich die Bereitschaft, den manchmal beschwerlichen Weg des Fremdsprachenlernens auf sich zu nehmen, steht und fällt mit dem Glauben ans Gelingen. Das heißt: Am Anfang eines Spracherwerbs steht der kooperative und explorative Präsenzunterricht mit viel Förderungspotenzial (so wie bei einem Kind, wenn es die Muttersprache zu erlernen versucht) und erst danach soll(te) digitale Unterstützung schrittweise eingesetzt werden.

Es reicht also nicht, beim Thema Personalisierung des Fremdsprachenunterrichts an einen virtuellen Ort zu denken, an dem Informationen beschafft, Instruktionen durchgeführt und Rückfragen an den Lerncoach/Tutor gestellt werden. Die Lernenden brauchen besonders in der Anfangsphase des Sprachenlernens **soziales Umfeld,** brauchen peer learning, brauchen Motivationsschub, brauchen die persönliche Präsentation ihrer eigenen Arbeitsergebnisse, brauchen Durchführung von Simulationen, brauchen mit anderen Lernenden ihre eigenen „Fehler" auszutauschen und an den Fehlern zu wachsen, brauchen auch Interagierung /Interaktivität mit den anderen, brauchen Kooperation und besonders brauchen sie das sofortige Feedback (so wie bei dem Kind eine Watsche à wenn man das Kind bestraft, nachdem er schon

vergessen hat, worum es geht und wo er den Fehler begangen hat, brauchen wir seine Fehler gar nicht mehr zu korrigieren), da nur die zeitnahe Stimulus-Response--Reaktion die erwünschten Früchte bringen kann.

2.1 Veränderung der Lehrerhaltung durch die neue Lernkultur: Die Rolle des Tutors/Lerncoaches

Der Trend zur Personalisierung des Lernens hat sowohl historische als auch sozial--gesellschaftliche Hintergründe und spiegelt weitgehend die zeitgemäßen Wünsche, Bedürfnisse, Potenziale und Ambitionen der Lernenden sowie deren wachsendes Interesse am Lernen und Zuwachs von Wissen wider.

Beim personalisierten Lernen wird die Förderung der Lernmotivation (die bei dem Sprachenlernen eine besonders sensible Rolle spielt) gering gehalten und Selbstlernkompetenz und Disziplin des Lehrenden stärker gefragt denn je. Dadurch wandelt sich auch die Rolle des Lehrers: der Lehrer wird immer mehr zum Lernbegleiter bzw. Lerncoach und immer weniger ein Wissensvermittler. Ganz im Sinne des eingehenden Zitats Galileos, dass man den Lernenden nur helfen (also sie unterstützend begleiten) kann, bis sie es (ihre eigenen Potenziale und Fähigkeiten) in sich entdeckt haben. Diese Veränderung wird durch die Technik und Digitalisierung verstärkt vorangetrieben und möglich gemacht, aber mit „sensiblen Hausverstand".

Bei allen drei unterschiedlichen Lernformen vergleichend ändert sich ganz stark die Rolle des „Lehrers".

INDIVIDUALISIERUNG	PERSONALISIERUNG	GENERIERUNG
Traditionelle Lehrerhaltung: Lehrer wird zum Wissensvermittler, „Trichter" des Wissens und Könnens	Lehrer wird zur Begleitperson, zum Lerncoach, zum Lernbegleiter und Tutor	gelernt wird ohne Coach, autonom, selbständig und in Eigenverantwortung

Abb. 2: *Wissensvermittelnde Funktion des „Lehrers" bei Individualisierung, Personalisierung und Generalisierung des Lernens*

2.2 Förderung von Lernfertigkeiten und Lernmotivation beim Sprachunterricht

Den Lehrpersonen steht bei der Entwicklung der Lernfertigkeiten und Förderung der Lernmotivation bei den Studierenden in der Anfängerphase des Erlernens einer (neuen) Fremdsprache eine zentrale Rolle zu: diese Rolle ist nicht zu ersetzen, da im Unterricht keine der sozialen Komponenten fehlen darf: lernen für sich selbst individuell, lernen in und mit der Gruppe, lernen von anderen Lernenden, lernen mit Lerncoach…Nämlich, Sprachunterricht soll ein Erlebnis sein und Sprache muss man gelingend und Sinn stiftend mit Mitlernenden erleben. Und das gemeinsame Output soll als befriedigend empfunden werden.

Mit der Schaffung einer neuen (digitalen) Lernumgebung entstehen zahlreiche komplexe und kombinationsreiche Formen der Unterrichtsgestaltung. Dabei sollen die Lehrpersonen einerseits exzellente Kommunikations- und Kooperationsfähigkeiten und einen hohen Ausmaß an Flexibilität haben, andererseits jedoch in der Lage sein, als Vermittler des Wissens und Förderer der Lernmotivation jederzeit unterstützend zur Verfügung zu stehen.

Personalisiertes Lernen heißt die Strategie (Müller, 2006) des zielführenden Lernens unter Berücksichtigung eigener Potenziale bzw. Potenziale des Lehrenden. Zielführend heißt, den Studierenden als Subjekt des eigenen Lernprozesses oder *„Autor des eigenen" Lebens* (Weigand, 2004) so weit bringen zu können („enabling", „facilitating"), dass er/sie sich sein/ihr Wissen im Einklang mit seinen eigenen Bedürfnisse aneignen und auf Basis des schon erworbenen Wissens neues Wissen generieren kann. Generieren heißt so viel wie erzeugen, etwas erschaffen. Erzeugt werden soll aufbauend das neue Wissen, natürlich aber auch Können und Wollen (knowledge, skills, attitude), so Müller (2003). Es geht darum, sich der eigenen Fähigkeit, des eigenen Potenzials und der effektiven Wirksamkeit bewusst zu werden und es voll auszuschöpfen versuchen.

Beim INDIVIDUALISIERTEn LERNEN sprechen wir von lernstoffzentriertem Lernen…	Beim PERSONALISIERTEn LERNEN sprechen wir von personenzentriertem Lernen…
Auslese beim Lernen →	→ Förderung des/der Lernenden
Defizit beim Lernen →	→ Stärken des/der Lernenden
Messbare Leistung (Produkt, Output) nach dem Lernen	→ Begabungsförderung des/der Lernenden

Abb. 3: *Perspektivenwandel, fundamentale Richtungsänderung*

3 Conclusio: Vom (passiven) Empfangen zum (aktiven) Gestalten

Wie hoch der Anteil des Online-Teaching beim personalisierten Lernen sein sollte, entscheidet jede Institution (und auch jede Person) für sich selbst. Meiner Meinung nach sollte Online-Anteil mit dem fortschreitendem Basiswissenserwerb steigen: je höher die Stufe des Sprachunterrichts ist, desto innovativer und kreativer, methoden-, medien- und abwechslungsreicher kann der Sprachunterricht gestaltet werden. Online-Teaching bedeutet für mich Entpersonalisierung, also Lernen mit gewissem Qualitätsverlust. Mit Online-Teaching lernt man zwar zeitlich und örtlich unabhängig, aber gibt es dadurch eine Gewinnsituation für beide Seiten? Sind wir tatsächlich bereit, auf persönlichen Motivationsschub durch Lerncoach und auf seine hohe didaktisch-methodische Qualität zu verzichten, besonders in Anfängersprachkursen? Obwohl wir ganz genau wissen, dass mit den Freiheiten und Optionen nur diejenigen Lernenden am besten umgehen können, die engagiert, motiviert, effektiv und nachhaltig lernen, die also „Lernprofis" sind. Für schwache oder/und nicht mo-

tivierte Lernende mit unterentwickeltem Lernmanagement ist Online-Teaching eher ein bedrohliches Szenario. Ob multimediale Sprachprogramme schwächeren Lernenden eher schaden oder nutzen, ist allerdings noch nicht abschließend erforscht (Rösler, 2010).

Darüber, wie viel, was und wann digital gelernt wird, können nur routinierte und erfahrene Sprachdidaktiker entscheiden, weil: was zeitgemäß ist, kann nicht unbedingt nützlich sein. Und Sprachinstitute, sprachvermittelnde Institutionen sind dafür da, um

- entsprechende Lern-Settings zu schaffen, um den Lernenden gerecht und bedürfnisgerecht zu werden
- den Lernenden zu ermöglichen (enabling, facilitating), ihre optimale, jeweils individuelle Entwicklung des eigenen Begabungspotenzials zu erzielen
- den Lernenden befähigen, sich das Wissen autonom, d.h. selbstgesteuert und in voller Eigenverantwortung aneignen zu können
- den Lernenden möglich zu machen, ihre persönlichen Lernziele durch starke subjektive Beteiligung und Eigenverantwortung zu erreichen bzw. verwirklichen
- mit Unterschieden der Lernenden (in Bezug auf persönliches Potenzial und Bedarfsorientiertheit) und ihren stark unterschiedlich ausgeprägten Lernkompetenzen konstruktiv, kreativ und innovativ umzugehen
- ihr Entwicklungsprozess als Coach/Tutor begleitend (und nicht wissensvermittelnd) zu gestalten
- den Lernenden zu ermöglichen, sich als Subjekt des eigenen Lernprozesses zu behaupten (und nicht als Objekt des Lehrens dazustehen)
- den Lernenden lebensgestaltendes Lernen zu ermöglichen durch die Vermittlung bzw. den Erwerb der für die Kommunikation wichtigen vitalen Kompetenzen: Sprach- und Kommunikationskompetenz (als Teilkompetenz seines/ihres soziales, reflektives und ethische Daseins) samt soft skills, um sich in der fremdsprachlichen und anders kulturell geprägten Umgebung erfolgreich behaupten zu können
- den Grundstein zu legen für die Freude und Motivation am Lernen, die ein Leben lang und lebenslänglich hält.

Beim begabungsangemessenen, bedarfsorientierten Sprachunterricht sollte nicht nur um Begabungsförderung gehen, sondern um adaptives und zielführendes Lernen, intelligentes zielorientiertes Tutoring, woraus die Eigenmotivation und Förderung der Lernautonomie, also ein relevantes und bedürfnisgerecht verfügbares Sprachwissen für das spätere (Berufs-) Leben generiert werden kann.

Bei der Personalisierung des Lernens halten wir uns nur drei vorwiegend sozial--regulative Ziele vor Augen: wie wir auf Chancengleichheit aller Lernenden hin ar-

beiten möchten, wie wir den Unterricht flexibler, einfacher und kostengünstiger gestalten könnten und wie wir dem Unterricht dabei noch eine persönliche Note geben könnten, vergessen wir gerne jedoch, dass sowohl die marktbestimmten Lösungen (Miliband, 2006) als auch Planstrategien zu wenig sind, um an das gewünschte ergebnisreiche Ziel kommen zu können.

Zum Schluss möchte ich noch auf die Worte und Erfahrungswerte von David Miliband (2006:24) hinweisen: bei der Entscheidung **für** oder **gegen** Personalisierung des Lernens sind folgende Komponenten bzw. Handlungsempfehlungen zu beachten:

- Man soll ganz genau die Stärken und Schwächen des einzelnen Lernenden kennen. Personalisiertes Lernen muss folglich von einer lernzweckbezogenen Bewertung ausgehen, und mit Hilfe von Daten und Gesprächen muss der Lernbedarf eines jeden festgestellt werden.
- Man soll Selbstvertrauen, Kompetenzen und Selbstdisziplin jedes Lernenden stark fördern, was entsprechende Lehr- und Lernstrategien voraussetzt.
- Personalisierung des Lernens bedeutet Curriculumwahl durch den Lernenden selbst und die Respektierung dieser Wahl, so dass ein breit gefächertes, auf den Bedarf der Lernenden zugeschnittenes Lehrangebot gewährleistet sein muss.
- Die Personalisierung des Lernens erfordert einen rigoros auf die Fortschritte des Lernenden ausgerichteten Ansatz der Institution- und Unterrichtsorganisation. Ein Schlüsselfaktor hierfür ist die Professionalität der Lehrkräfte, die den unterschiedlichen Anforderungen der Lernenden gerecht werden können.

Bevor das alles passiert, soll der Lernende die Beziehung zum Sprachlernen aufbauen, überlegt Kultur des Sprachlernens entwickeln, Freude an der Selbstleistung entwickeln, individuelle Ressourcen und Potenziale ausschöpfen lernen, Lern- und Lebenserfolge generieren lernen... für ihn/sie äußerst relevante Lernkompetenzen entwickeln und aufbauen.

Weil, nur ein bisschen Kosmetik reicht bei weitem nicht (Müller, 2014). Man soll versuchen, jedes System mit Experten und ihrer Expertise zu professionalisieren.

Fazit: an der Fachhochschule Burgenland in Eisenstadt halten wir uns an die Sprachlernprinzipien der internationalen Qualitätssicherung und an der signifikanten Änderung der Wissensaufnahme jüngerer Generation, d. h. wir orientieren uns sowohl an den zu erwerbenden Sprachkompetenzen als auch an Studierenden und ihren Bedürfnissen, an der Förderung der Lernautonomie und an die SMART-Methode von Müller (2004), wo **S** für „spezifisch", konkret, klar und eindeutig, **M** für „messbar", **A** für „ausführbar" (verbunden mit dem Gefühl der Machbarkeit), **R** für „relevant" steht und **T** für „terminiert" entsprechende zeitliche Verbindlichkeiten schafft. Den Sprachunterricht gestalten wir methodisch vielfältig, wobei die Transparenz der Unterrichtsziele und zielsprachlicher Unterricht im Vordergrund stehen. Der Einsatz von Plattformen im Fremdsprachenunterricht erfolgt lediglich nicht deshalb, weil

wir in der digitalen Ära leben und digitale Medien einfach da sind. Für uns ist es von besonderer Wichtigkeit, eine kritische Distanz und den gesunden Menschenverstand zu den didaktisch-methodischen Segnungen zu bewahren, die uns vom Gebrauch der digitalen Medien versprochen werden.

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Bionote

Univ.-Prof. Dr. Irena Zavrl, PhD, e-mail: irena.zavrl@fh-burgenland.at, Fachhochschule Burgenland, Eisenstadt, Austria
Die Expertise der Autorin liegt in der Lehre und Forschung in der Sprachwissenschaft, Sprachsystem, Sprachverwendung, Fachdidaktik und Methodik, Interkulturalität, Blended Learning und Fernstudium.

Роль лингвистической игры в формировании речевых компетенций студента при изучении русского языка как иностранного

Monika Ševečková

Abstract: The article informs about the key role of game as an educational section in child's life, as well as in adulthood, placing emphasis on folklore genre, function and pedagogical side of the topic. Regarding the fact, that the child games belong to the circle of spiritual culture, the author explains the basic principles necessary to understand the importance of game application in adulthood. Inclusion of such games into teaching of foreign languages helps students to take on different levels of language and also helps to process a large amount of new information. The author of the study refers to the main aspects of this scientific field in connection with her own pedagogic view and is convinced, that the teaching or Russian language, as a foreign language is linked with linguoculturology. Based on her own experiences with mixed multicultural groups of students, there is also emphasized the importance of game application for overcoming the language and communication barrier and for creation of pleasant work atmosphere during the lessons. In the end the study brings the particular examples and games used during the teaching of Russian for academic and specialized purposes.

Key words: game, child, adult, pedagogy, teaching

Абстракт: Статья посвящена роли игры в рамках обучения ребенка и взрослого. Особое внимание уделено педагогическому аспекту и практическому использованию языковых игр при обучении иностранному языку. Опираясь на личный опыт работы со смешанными многонациональными группами студентов, автор утверждает, что использование игр во время обучения способствует преодолению языкового коммуникационного барьера и создаёт требуемую рабочую атмосферу в аудитории. В заключении статьи приведены конкретные примеры лингвистических игр, использованных автором во время преподавания русского языка как иностранного.

Ключевые слова: игра, ребёнок, взрослый, педагогика, обучение

Abstrakt: Příspěvek informuje o zásadní roli hry jako výukové složky v životě dítěte i dospělého s důrazem na pedagogickou stránku dané problematiky. Dítě se na základě herní složky ve výchově učí porozumět okolnímu světu a najít si své místo v kolektivu. Vzhledem k faktu, že dětské hry patří do oblasti duchovní kultury, odvolává se autorka na některé významné entolingvisty a přibližuje základní etnolingvistické principy nezbytné k pochopení důležitosti využití her i v dospělosti. Zařazení her do výuky cizích jazyků napomáhá studentům osvojovat si různé kategorie jazyka a přirozenou formou zpracovat velké množství nových informací. Autorka příspěvku je přesvědčena, že je otázka studia ruského jazyka jako cizího spojena také s lingvokulturologií, poukazuje tedy na hlavní momenty této vědní disciplíny ve spojitosti s pedagogickým pohledem. Na základě vlastní zkušenosti autorky příspěvku se smíšenými mnohonárodnostními skupinami studentů je akcentována také důležitost využití her pro překonání jazykové komunikační bariéry a vytvoření dobré pracovní atmosféry během výuky.

V závěru článek přináší konkrétní příklady a hry využívané během výuky ruského jazyka pro akademické a odborné účely.

Klíčová slova: hra, dítě, dospělý, pedagogika, učení

Жизнь человека, её закономерности и исключения, длительное время является предметом изучения многих научных дисциплин. Цель данной статьи – описание роли игры в человеческой жизни, то есть игры как средства развлечения и игры как одной из многих возможностей углубления знаний во время обучения иностранному языку. Несмотря на то, что мы рассматриваем игру как вид определённой деятельности ребенка или стиль жизни семьи, у родителей часто нет времени для активного отдыха, игры с детьми, поскольку работа и её результаты в настоящее время занимают главное место в жизни взрослых. Каждый из нас в определённой степени осознаёт, что игра составляет основной концепт детства и развивает языковую картину мира ребёнка. Если мы позволяем себе забывать о мире детских игр, мы утрачиваем свои корни и потом не сможем передать будущему поколению то, что сформировало нас и наших предков.

Благодаря основным принципам этнолингвистики и когнитивной лингвистики, можно объяснить и понять важность использования игр и в зрелом возрасте. Этнолингвистика исследует язык того или иного народа как выражение его представлений о мире, пытается определить связи языка с культурой, объяснить обрядовость и вопросы мифологического характера. Взаимная связь педагогики и когнитивной лингвистики была очевидна уже в 60-ые годы прошлого века. Работая с такими понятиями как концепт, языковой релятивизм, языковая картина мира, теория метафоры, данная дисциплина акцентирует внимание на языковой креативности, изучает связи между языком и мышлением, языком и познанием мира, языком и культурными ценностями. Принимая во внимание факт, что именно язык формирует образ мира его носителя а также развивает мышление обучаемых языку[1], креативность можно развивать также с помощью правильно подобранных языковых игр[2] и упражнений.

С первыми играми ребёнок встречается уже благодаря колыбельным песням и пестушкам. Во время их прослушивания, это является первым контактом ребёнка с вербальным и музыкальным миром[3], развивающим чувство языка, пробуждается фантазия и формируется его языковое восприятие. С точки зрения педагогики очевидно, что игра представляет для ребёнка не за-

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[1] Подр. см. Pacovská 2012: 43.

[2] Термин *языковая игра* ввёл Людвиг Виттгенштейн (Ludwig Wittgenstein), австрийский философ-аналитик.

[3] Skopová 2008: 9.

дачу, а эмоциональный выбор, внутреннюю необходимость. Используя игры в целях воспитания детей, мы, кроме всего иного, учим их понимать окружающий мир и находить свое место в коллективе. Групповые игры помогают ребёнку сформировать требуемые навыки и нормы поведения в обществе[4].

Благодаря своей связи с фольклорной обрядностью и духовной культурой, игра может стать также основным воспитательным методом в жизни детей. Многие известные этнолингвисты и этнологи акцентируют внимание на значимости роли игры в жизни человека (Альберт Кушфуллович Байбурин, Дана Биттнерова (Dana Bittnerová), Игорь Алексеевич Морозов, Ясня Пацовска (Jasňa Pacovská), Ирина Семеновна Слепцова и другие), хотя дефиниция *детской игры* до сих пор не определена, что, скорее всего, связано с широким теоретическим диапазоном этнологии[5].

Феномен детской игры уходит своими корнями в давнюю историю человеческой цивилизации. Уже древние римляне уделяли особое внимание применению игр в детском обучении. Игры можно разделить на две основные группы – к первой относятся игры, которые имитируют те функции взрослых, которые для детей в будущем будут представлять их профессию – это напоминает нам связь игры и ритуала (например, игры в крестины, свадьбу, урожай, стройку дома, приготовление блюд, войну). Ко второй группе принадлежат игры, в которые дети играют только с развлекательной целью[6]. Роже Кайоа (Roger Caillois) характеризовал игру как независимую, ограниченную во времени и пространстве, вызывающую напряжение, непродуктивную, фиктивную и связанную правилами деятельность[7]. В современных пособиях чаще всего встречаются определения игры как одной из основных форм деятельности человека или совокупности самореализуемых активностей без материальных благ ограниченных правилами[8].

Факт, что элементы игры присутствуют и в самом языке (например, каламбуры), наводит преподавателей на мысль использовать игры при обучении иностранному языку. Их использование во время преподавания иностранных языков, знанию которых в XXI веке уделяется особое внимание, помогает студентам осваивать разные категории языка и воспринимать большее количество новой информации более простым путем. На это обращал внимание уже Ян Амос Коменский (Jan Amos Komenský) в своем научном труде *«Мир в картинках»* (1658 г.).

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[4] Ibid., p. 7.

[5] Подр. см. Bittnerová 2001: 515.

[6] См. Гримич 2008: 259.

[7] Caillois 1998: 32.

[8] Kotrba, Lacina 2011: 116.

Мы придерживаемся мнения, что вопросы преподавания русского языка как иностранного связаны также с лингвокультурологией: изучение иностранного языка дает возможность лучше понять культуру того или иного народа и носителя данного языка в частности. «С развитием общества картина мира и концепция обучения изучаемого предмета (родного или неродного языка) сравнительно быстро меняется, поэтому можно наблюдать различия в дидактических принципах, т. е. содержании, способах и т. п., включая уровень и условия школ в наши дни по сравнению с прошлым временем в конкретных странах.»[9] Именно передачей социокультурной информации в языковых играх преподаватель может развивать у студентов социокультурную компетенцию, являющуюся составной частью коммуникативных компетенций[10].

Используя созданную в аудитории обстановку, преподаватель может успешно комбинировать все ключевые навыки – проекционные (подготовка к преподаванию), реализационные (конкретный семинар), модификационные (гибкость) и саморегуляционные (оценка семинара)[11]. Языковые игры приносят эффект именно в области проекции и модификации – в ходе решения сложных проблем (например интерференция). Игры помогают удерживать внимание или организовать семинар в случае неожиданных ситуаций (например, в аудитории не работает техника).

Принципы автономного обучения используются на практике уже несколько лет, поэтому мы все чаще встречаемся с обучением, направленным на студента (например, индивидуальный, личностно ориентированный подход) при котором определённое внимание обращается на его интересы, творчество, подход к преподаваемому материалу, на понимание и уважание взглядов обучаемого[12]. При этом важно учитывать стили и стратегии обучения. Преподаватель должен иметь в виду, что стили обучения меняются не так часто как стратегии обучения, где студент решает, какие навыки ему применять в том или ином случае. Используя игры во время процесса обучения для укрепления правильных стратегий студентам необходимо объяснить цель приминения, т. е. какие умения мы хотим развивать и поддерживать[13]. Неписаным правилом является факт, что, благодаря чтению, студент запоминает приблизительно 10 % материала, дискуссии – 50 %, а «обучая» остальных студентов, он запомнит около 90 %. С каждым годом становится

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[9] Шинделаржова 2013: 509.

[10] См. Choděra 2001: 39–41.

[11] См. Jelínek 2003/2004: 50.

[12] См. Janíková 2004/2005: 42; Lojová 2004/2005: 39.

[13] Подр. см. Janíková 2004/2005: 42–43; Lojová – Vlčková 2011: 169–174.

всё очевиднее, что использование языковых игр необходимо для того, чтобы сосредоточиться на конкретных стратегиях обучения[14].

Здесь мы остановимся подробнее на понятии реализационной компетенции, т. е. ошибках, их оценке и факте, что устранять некоторые типы ошибок помогают именно языковые игры. Классической на сегодняшний день является классификация, где определяют две группы ошибок: а/ возникающие в рамках языковой компетенции (errors), б/ возникающие в рамках языковой реализации (стресс, актуальная обстановка – mistakes)[15]. Кроме учёта разных аспектов (педагогический, лингвистический, психологический) при классификации ошибок меняется также точка зрения на ошибки в общем – всё чаще проявляется тенденция оценивать ошибку как «мотивационный исходный пункт для познавательных процессов», акцентируя возможность на познании, «каким образом происходит процесс обучения»[16]. Все сказанное позволяет утверждать, что нельзя переоценивать ошибки грамматического характера за счет лексики или произношения – основным критерием должны быть понятность, ритмичность, дифференциация формальной и неформальной речи, а также соблюдение социолингвистических правил[17].

На наш взгляд можно выделить несколько причин ошибок, которые студенты совершают чаще всего. Самой распространённой является интерференция[18] (лингвистическая или экстралингвистическая), недостаточные знания о теме, волнение, стресс и т. д. Следует отметить, что влияние интерференции можно минимизировать, тренируя спонтанную речь (студенты дома готовят лексику, в т. ч. типичные фразы на тему семинара, или работают со словарями прямо на семинаре). Проявление волнения можно постепенно устранить с помощью стеденческих презентаций на темы семинаров, в таких случаях повышается уверенность студентов в себе. Во время этих презентаций важно мотивировать студентов к самокоррекции и самооценке – эти термины подчеркивают важность автономного обучения – студенты, таким образом, начинают осознавать, что их работа на семинарах имеет практическое применение. Хотя ошибки и имеют «огромное значение для контроля за продвижением обучения иностранному языку»[19] , для того, чтобы студенты их не боялись, очень важно (например, в начале семестра) объяс-

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[14] Подр. см. Janíková 2004/2005: 44.

[15] См. Veselý 1985: 77–82; Свинцова 2004: 243–274; Klarová 2008/2009: 149; Choděra 2001: 112–116, Stephen Pit Corder 1981: 18.

[16] „Moderní psychologické směry chápou chybu jako motivační východisko pro poznávací proces a její zkoumání využívají jako cenný zdroj informací o tom, jak proces učení probíhá.“ (Klarová 2008/2009: 149).

[17] Klarová 2008/2009: 149.

[18] Подр. см. Veselý 1985: 17–18, 28–33.

[19] „Má velký význam pro monitorování postupu osvojení si daného jazyka.“ (Klarová 2008/2009: 153).

нить им, как именно ошибки рассматриваются и оцениваются преподавателем.

Опираясь на личный опыт работы со смешанными многонациональными группами студентов, мы утверждаем, что использование языковых игр и других методов активизации студентов во время обучения в вузе помогает преодолеть языковой коммуникационный барьер, формирует приятную атмосферу в аудитории, оживляет процесс обучения, делает предмет более привлекательным и моделирует реальные ситуации, с которыми студенты встречаются или могут встретиться в собственной повседневной жизни. Корректное использование языковых игр, опирающееся на индивидуальные когнитивные стили студентов, также помогает активизировать автономное обучение[20].

Во время преподавания русского языка специализированного уровня на Экономическом факультете и русского языка академического уровня на Философском факультете мы многократно и успешно использовали языковые игры и упражнения, которые развивают словарный запас и такие когнитивные категории как метафоричность языка, фразеологические или этимологические обороты. На наш взгляд для того, чтобы все студенты могли применить свои способности, всегда важно учитывать разнообразие определённых видов задач (визуальные, аудитивные и двигательные). Важна здесь также и самостоятельность обучаемых.

Примеры языковых игр и упражнений:

№ 1. Анекдоты

Студенты работают с анекдотами на определенную тему (например: деньги, политика) в парах, листы бумаги с написанными анекдотами разрезаны на две половины, задачей является найти окончание анекдота, обсудить незнакомые слова, найти и объяснить суть анекдота. Благодаря задачам такого типа, студенты знакомятся с тем, как создавать стратегии переводческой семантизации, знакомятся с когнитивными подходами к значению слов, а также с автоматизацией целых фраз[21], исходящих из «живого» языка. В конце таких языковых упражнений студенты должны попытаться пересказать анекдоты, используя автоматически грамматические и лексические формы.

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[20] Подр. см. Jelínek 2003/2004: 52.

[21] „Odborníci podčiarkujú dôležitosť automatizovania nižších „subzručností", rôznych ustálených spojení a fráz, ktoré majú v rečovom prejave nezastupiteľné miesto." (Lojová 2004/2005: 38)

№ 2. Неисправная вещь

Студенты работают попарно, один из участников называет любую неисправную или неработающую вещь, а второй задает вопросы, пытаясь таким образом угадать, при каких обстоятельствах случилась поломка и т. д. Целью языковой игры является пополнение словарного запаса, развитие фантазии, коммуникативных компетенций в иностранном языке, а также укрепление отношений в коллективе.

№ 3. Г-н Фразеолог

Студенты должны прочитать дома рассказ известного русского писателя (например, А. П. Чехов), в котором автором были использованы фразеологические обороты. После объяснения возможных непонятных оборотов, отдельных слов или фраз и дискуссии студенты тренируют собственную письменную компетенцию. Для этого обучаемых необходимо разделить на группы: одна пишет текст (инструкция: макс. 150 слов, 10 минут, использование фразеологизмов) на тему «Как мог бы себя чувствовать герой рассказа в XXI веке?», вторая – на тему «Как бы я чувствовал/-а себя в исторической эпохе рассказа?». Цель – развитие сотрудничества в группах, закрепление фразеологических единиц и стилистических оборотов.

№ 4. Конец сказки

Студенты работают в группах с известной сказкой (например, «Медведь», автор А. Н. Афанасьев), которая была им предложена без концовки. Задача – дописать (придумать) конец сказки и презентовать его другим обучаемым. Благодаря такой задаче, студенты расширяют свои знания о духовной культуре другого народа, учатся воспринимать необходимость развития культурного наследия и традиций, а также закрепляют стратегии, которые направлены на передачу социокультурного аспекта.

№ 5. Комикс

Студенты работают в парах с комиксом, состоящим из 12 картинок, и словарем. Речь идёт о так называемых «ложных друзьях» (например, zastavit/заставить, čerstvý/черствый, dlouhý/долгий, длинный, úžasný/ужасный, pozorný/позорный, obyvatel/обыватель, starost/старость, vypadat/выпадать). Задача игры: описать случай из жизни, используя максимум одно предложение для каждой картинки. Студенты, таким образом, развивают коммуникативные компетенции и стратегии, связанные с усвоением потенционального словарного запаса, знакомятся с более сложным словарным составом, учатся работать с народной этимологией.

№ 6. Волшебная страна

Студенты работают в парах с картинкой по теме семинара (например, политическая система), задача – описать ситуации на картинке глазами политика, который приезжает в данную страну с целью проведения политических переговоров. Студенты тренируют развитие стратегий, которые углубляют навыки использовния компенсационных выражений, сотрудничают в группе, закрепляют академический язык, а также развивают фантазию.

№ 7. Впечатление/История пяти фотографий

Студенты должны принести на семинар любую фотографию, которая касается русской среды, снятую с помощью мобильного телефона или планшета. В начале семинара в рамках «языковой зарядки» ведется дискуссия о фотографиях. Задача – часть студентов описывает в парах фотографии попарно, стараясь при этом использовать специальный («технический») язык, а часть – с помощью академического («абстрактного») метаязыка (напр. проблема, идея, теория, обсуждать, вести дискуссию). Цель – развитие у обучаемых языковых компетенций, фантазии и необходимости «видеть мир». Вариантом для тренировки письменной компетенции здесь, например, является задача написать самостоятельно «Историю пяти фотографий» из пяти предложений (например в качестве домашнего задания).

№ 8. Пирамидальная дискуссия

После прочтения текста на тему семинара студенты получают вопросы для дискуссии. Сначала дискуссия ведётся попарно, потом в группах (четыре студента) , и, наконец, в бóльших группах (восемь студентов). В конце языковой игры вся группа высказывается о том, понравилась ли игра и к каким выводам они пришли. Данный тип активности помогает студентам развивать самостоятельность, компетенцию обучения в целом, а также интегрировать более застенчивых студентов и показать, что каждый человек является важным для группы в целом.

№ 9. Журналист

Студенты работают в группах с картинкой. Используя картинку, необходимо за 10 минут написать короткое сообщение, которое будет опубликовано в разных типах периодических изданий (экономическая газета, желтая пресса, журнал для женщин, журнал для детей в возрасте 8–12 лет и т. п.). Цель – проверить знания обучаемых в области русской стилистики, возможности группового сотрудничества. Представить результат работы группы (устно или письменно) может любой ее участник, что дает возможность занимать даже несмелых студентов.

№ 10. Личность

Студенты работают в парах с фотографией неизвестного человека. Поставленная задача – дать ответ на пять вопросов (Кем может быть данное лицо – возраст, внешность, одежда? Какой у него/неё характер? Кем он/она работает? Чем занимается в свободное время? Чем человек интересен?). Целью данного вида игры является поиск стратегии, направленной на обработку потенциального словарного запаса, закрепление и развитие презентационных навыков, обращение внимания на мультикультурную толерантность и необходимость сохранения национальной идентичности. При наличии времени данную игру можно использовать в качестве базовой для тренировки разговоров-собеседований используемых при поиске новой работы.

После окончания таких игр и упражнений желательно студентам снова объяснить, почему им были предложены именно эти игры (какие явления/категории/компетенции ими закреплялись), а также попытаться предоставить обучаемым возможность выразить свое мнение (понравились ли им игры, что нового они узнали, как себя чувствовали), – это особо важно для того, чтобы подчеркнуть значение студенческого мнения для вас как преподавателя, поскольку именно преподаватель является тем, кто стремится вести студентов, а не убеждать.

Подводя итоги, можно утверждать, что игра является феноменом, который сопровождает нас на протяжении всей нашей жизни и деятельности а также человеческой истории. Цель данной статьи – привлечь внимание к использованию языковых игр разных жанров (лексические, грамматические, для обучения чтению и развития речи). В нашей статье мы описали игры, которые успешно используем во время преподавания русского языка как иностранного. Данные игры также можно в различных модификациях обнаружить и в специальной литературе (см. список). При написании статьи мы также руководствовались собственным многолетним опытом работы с детьми и взрослыми.

Ведя речь об использовании языковых игр при обучении русскому языку как иностранному, важно подчеркнуть их особый лингвистический аспект. В процессе игровой деятельности студенты пополняют свой словарный запас, тренируют разные виды речевой деятельности, в первую очередь навыки устной речи, а также улучшают свои способности к взаимному общению.

Использование языковых игр и упражнений является также важным и с педагогической точки зрения. Языковые игры и специальные упражнения «положительно влияют на динамику учебной группы, обеспечивают целостность обучения, создают естественные коммуникативные ситуации и дела-

ют возможной комбинацию различных умений и навыков»[22]. Они имеют большое методологическое и дидактическое значение, помогают студентам обрести способности к самовыражению, повышают активизацию деятельности обучаемых и способности к освоению иностранных языков или даже других предметов.

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Bionote

Моника Шевечкова, e-mail: monika.seveckova@econ.muni.cz
Центр языковой подготовки, Университет им. Масарика, Брно, Чешская Республика

Interkulturalita ve výuce jazyků na Vysoké škole Burgenland

Ludmila Waschak

Abstrakt: Vysoká škola Burgenland patří od svého vzniku v roce 1993 mezi pionýry ve výuce jazyků zemí střední a východní Evropy v rakouském vysokoškolském sektoru. V článku je krátce nastíněna výuka od absolutních začátečníků do úrovně B1 s důrazem na interkulturní aspekt. K tomu patří bilaterální letní škola jazyka v zahraničí, využívající mimo jiné vlastní materiály *Tandem*, stejně jako interkulturní komunikace, která je především prakticky využívána během 15týdenní praxe v zahraničí. V příspěvku je položen důraz na výuku na úrovni B1 – ekonomický jazyk včetně speciálních materiálů pro samostudium s pracovním názvem *Testovací praktikum jako forma kontroly odborné jazykové způsobilosti*. Příklady testů jsou vybrány z následujících kapitol: lexika – gramatika, čtení, psaní, poslech, mluvený projev a interkulturní komunikace, které společně prověřují základní odbornou terminologii, pochopení profesionálně orientovaných textů, různé strategie a taktiky čtení a poslechu, schopnost vést jak odborný ústní, tak i písemný projev a v neposlední řadě i přezkoušení interkulturní kompetence. V článku jsou uvedeny i další praktické příklady z výuky češtiny jako druhého cizího jazyka.

Klíčová slova: interkulturní aspekt, ekonomický jazyk, odborná jazyková způsobilost

Abstract: Since its establishment in 1993, the University of Applied Sciences Burgenland in Eisenstadt has been among the pioneers teaching CEE languages within the higher education sector. This article briefly presents the instruction, teaching and learning of absolute language beginners continuing to level B1, combined with intercultural knowledge. Among other things, the bilateral summer university in the land of the chosen language implements its own tandem teaching materials of language together with intercultural communication, the knowledge of which is put into practice during the fifteen week work placement in a foreign country. This article focuses on specialized business language courses at level B1. In connection with this, special materials for „Testing and Monitoring of Foreign Language Competence" for independent study were developed and introduced. Test examples are chosen from the following chapters: Lexis-Grammar, Reading, Writing, Listening, Speaking and Intercultural Communication. These tests verify basic terminology, understanding of professionally oriented tests, various strategies and tactics for reading and listening, the ability to use different expressions in oral and written form, and last but not least, intercultural competence. Further practical examples from Czech (as a second foreign language) instruction are given.

Key words: intercultural knowledge, business language, Foreign Language Competence

1   Úvod. Interkulturalita a SERR ve výuce cizích jazyků

Vysoká škola Burgenland patří od svého vzniku v roce 1993 mezi pionýry ve výuce jazyků zemí střední a východní Evropy v rakouském vysokoškolském sektoru. V bakalářském studijním programu Mezinárodní hospodářské vztahy jde o jedinečnou

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kombinaci ekonomického studia s jazyky. Prvním cizím jazykem je pro všechny ang-
ličtina, s jejíž výukou začínají studenti na úrovni B2 SERR a během studia dosáhnou
úrovně C1/C2. Jako druhý povinný cizí jazyk volí studenti jeden z jazyků zemí střed-
ní a východní Evropy; momentálně je to čeština, chorvatština, maďarština, ruština
a polština. Jedná se o jazyky, které jsou nabízeny pro absolutní začátečníky a po ukon-
čení bakalářského studia dosáhnou studenti úrovně B1 SERR ekonomického jazyka.
(Popis znalosti ekonomického jazyka podle „Arbeitsplatz Europa: Sprachkompetenz
wird messbar / Pracoviště Evropa: jazyková kompetence bude měřitelná", 3. vydání,
2007, s. 8–15:

> *„Absolvent by měl zvládnout na úrovni B1 SEER následující úkoly:*
> ***Při čtení*** *by měl rozumět obchodním a úředním dopisům. Absolvent by měl zvládat rych-
> ločtení oznámení a jiných textů (např. brožurek) v takové míře, aby našel důležité infor-
> mace (co, kdo, kde, kdy, jak). Měl by rozumět hlavním výpovědím a důležitým detailům
> v článcích a zprávách o tématech z vlastního oboru činnosti.*
> ***Při psaní*** *by měl umět podat jednoduché informace prostřednictvím faxu / e-mailu, nebo
> se na ně zeptat. Měl by umět napsat žádost o místo, tabelární životopis, stejně jako text
> na téma z oblasti své působnosti a těžiště objasnit. Měl by být schopen napsat krátké
> jednoduché texty o událostech nebo trendech, které jsou určeny pro zprávu nebo protokol,
> a to eventuálně za použití jednoduchých grafik.*
> ***Při poslechu*** *by měl rozumět hlavním aspektům rozhovorů / jednání, které se vztahují
> na méně komplexní líčení pracovního oboru, pokud jsou informace vysloveny poměrně
> pomalu, zřetelně a je používán standardní jazyk.*
> ***Při mluvení*** *by měl zvládnout typické situace, které mohou vzniknout na služebních
> cestách, jako je např. získání informací k jízdním řádům, provedení rezervace hotelu,
> objednání taxi. Měl by umět podat informaci o činnosti oddělení, firmě, výrobcích. Měl
> by umět položit otázky týkající se pracovních procesů, dohod, rozhodnutí. Měl by být
> schopen krátce odůvodnit své názory, jednání, rozhodnutí. Měl by umět jednoduchými
> frázemi popsat pracovní procesy a podat informace o svých zkušenostech. Měl by umět
> jednoduchým způsobem reprodukovat krátké pasáže z pracovně relevantních textů /
> prezentací."*

1.1 Proč se ve studijním oboru Mezinárodní hospodářské vztahy vyučují právě jazyky zemí střední a východní Evropy?

Vysoká škola Burgenland vzdělává více než dvacet let podnikové ekonomy, kteří
nacházejí uplatnění jak ve firmách národních, tak i mezinárodních. Rakouské firmy
pracují aktivně na trzích zemí střední a východní Evropy, kde patří k nejdůležitěj-
ším obchodním partnerům a investorům, a právě znalost jazyka a kultury partnera
(alespoň na Prahové úrovni B1) pomáhá předcházet nedorozuměním.

Chorvatsko sice nenajdeme mezi dvanácti nejdůležitějšími obchodními partnery, ale
jako zahraniční turistická destinace stojí na druhém místě – za Itálií a před Němec-
kem (http://www.statistik.at/web_de/statistiken/tourismus/reisegewohnheiten/)

Tab. 1: *Nejdůležitější obchodní partneři Rakouska v roce 2013*

země	podíl na importu 2013 v %	země	podíl na exportu 2013 v %
Německo (1)	37,5	Německo (1)	30,1
Itálie (2)	6,1	Itálie (2)	6,5
Švýcarsko (3)	5,2	Spojené státy americké (3)	5,6
Čína (4)	5,2	Švýcarsko (4)	5,0
Česká republika (5)	4,0	Francie (5)	4,7
Spojené státy americké (6)	3,3	**Česká republika** (6)	3,5
Francie (9)	2,9	**Maďarsko** (7)	3,1
Maďarsko (8)	2,9	Spojené království (9)	2,9
Nizozemí (10)	2,6	**Polsko** (8)	2,9
Ruská federace (7)	2,4	**Ruská federace** (10)	2,8
Slovensko (11)	2,3	Čína (11)	2,5
Polsko (12)	2,0	Slovensko (12)	2,0

Pramen: http://www.statistik.at/web_de/services/wirtschaftsatlas_oesterreich/aussenhandel/: (STATISTIK AUSTRIA, zahraniční obchod. Čísla v závorkách ukazují pořadí nejdůležitějších obchodních partnerů Rakouska v roce 2012. – zpracováno: 01.09.2014)

Důležité pro vzdělávání specialistů v cizím jazyce je, aby studenti získávali během výuky interkulturní kompetenci. Úspěšně komunikovat může jen ten, kdo má znalost kulturních předpokladů svého partnera, dokáže jejich význam odhadnout a dát je do vztahu k vlastním kulturním předpokladům. Z toho vyplývá, že nelze vynechávat interkulturní dimenzi v jazykovém kontaktu. (Christ, 1994)

Jinými slovy to znamená, že ve výuce cizích jazyků hraje vedle komunikativní kompetence důležitou roli kompetence interkulturní. Student se učí v cizím jazyce nejen aktivně komunikovat, ale zároveň také přizpůsobit své chování (jak verbální, tak i neverbální) kulturním hodnotám národa, jehož jazyk se právě učí. Studenti musí být ochotni akceptovat skutečnost, že lidé jsou různí a že je nutné tyto rozdíly respektovat, přijmout a také se jim snažit porozumět. Student se učí cizímu jazyku společně s jeho kulturou a zároveň srovnává kulturu svého mateřského jazyka s kulturou jazyka cílového, jelikož obě kompetence jsou vzájemně propojené. Nejde o oddělené procesy, protože své kompetence v mateřském jazyce a vlastní kultuře student neztrácí, nýbrž postupně nabývá **vícejazyčnosti** a rozvíjí si **interkulturní vnímání.** Jak jazykové, tak i kulturní kompetence se v obou jazycích díky vzájemnému ovlivňování mění, přičemž zároveň dochází k upevňování interkulturální způsobilosti a s ní souvisejících dovedností a praktických znalostí. Tím se posilují i studentovy schopnosti pro další učení se cizím jazykům a student získá nezaujatý přístup k novým kulturním zkušenostem. (Společný evropský referenční rámec pro jazyky, s. 45)

Společný evropský referenční rámec pro jazyky uvádí následující interkulturální dovednosti a praktické znalosti, které by měli studenti ovládat:

- schopnost dát do vzájemné souvislosti výchozí a cílovou kulturu;
- vnímavost ke kultuře a schopnost identifikovat a užívat různé strategie, které jsou zapotřebí ke kontaktu s představiteli jiných kultur;
- schopnost plnit roli kulturního zprostředkovatele mezi svou vlastní a cizí kulturou, stejně jako schopnost efektivně řešit nedorozumění interkulturálního charakteru a konfliktní situace;
- schopnost vypořádat se se stereotypními vztahy. (Společný evropský referenční rámec pro jazyky, s. 106–107)

1.2   Cíle interkulturního učení ve výuce cizích jazyků

„Učit se cizí jazyky znamená více než biflovat slovíčka a ovládat gramatiku. Důležité je především poznat životní styl, zvyky a obyčeje, ideologii země. Teprve pak je obraz jazyka kompletní." (Sprachkenntnisse als Wettbewerbsvorteil, s. 15)

Cílem interkulturního učení je jak příprava na kontakt s jinou kulturou, tak formování odpovídajícího chování s přihlédnutím k podmínkám této kultury. Jinými slovy to znamená vývoj interkulturní kompetence jako výsledek změn reakcí, chování osobnosti a v myšlení. Modely pro každodenní komunikaci mezi rodilými mluvčími nejsou přenosné do oblasti interkulturní komunikace; akumulace každodenních znalostí neznamená automaticky pochopení cizího jazyka a jeho kultury, ani není automaticky základem úspěšné komunikace. (Berditchevski, 2014) Proto je důležité zprostředkovat studentům informace, jakým adekvátním způsobem se mají chovat při jednání s lidmi s různými kulturními předpoklady – ať už jde o studijní kolegy během letních škol v zahraničí či kolegy během zahraniční praxe nebo později o zaměstnance, obchodní partnery či klienty. Je nutné upozornit studenty na odlišnosti a vysvětlit jim, že jejich způsob myšlení a chování není jediný možný, ani lepší ani horší, že je jen prostě jiný. A že je pro obě strany výzvou i příležitostí naučit se navzájem něčemu novému. Je důležité připomenout studentům, že i v rámci jednoho národa, jednoho státu, existují rozdíly – ať už regionální, sociální či kulturní. Z výše uvedených důvodů jsou studenti seznamováni se společenskými normami, typickými zvyky, tradicemi a kulturou dané země.

Interkulturní kompetence patří v dnešní globalizované ekonomice vedle cizojazyčné kompetence mezi kompetence klíčové, a proto je předpokladem nejen pro úspěšné jednání se zahraničními kolegy, partnery i zákazníky, ale pro úspěšnou kariéru vůbec.

2 Výuka druhého cizího jazyka na Vysoké škole Burgenland

Bakalářské studium Mezinárodní hospodářské vztahy, 6 semestrů, 24 ECTS, úroveň B1

„Studenti jsou schopni dorozumět se v jednoduchých každodenních a profesionálních situacích (jako jsou první kontakty, small talk, telefonní rozhovory, obchodní korespondence, podání žádosti o místo, prezentace výrobků a prezentace firmy) v jednom středoevropském či východoevropském jazyce jak ústně, tak i písemně. Využívají své znalosti a zkušenosti z oblasti kultury, ekonomiky a společnosti.“ (viz Informační brožurka o studiu na Vysoké škole Burgenland)

Plán pro denní studium:

Semestr	Počet hodin	Tematické okruhy
1.	60	Abeceda, jazyk, výslovnost První informace o cílové zemi První kontakty (pozdrav, představení se, seznámení se, rozloučení, poděkování, omluva) Rodina, členové rodiny Povolání, koníčky Orientace Každodenní komunikace (výměna informací ke známým tématům – ústně i písemně – psaní osobních dopisů)
2.	60	Rozšiřování znalostí: první kontakty a osobní údaje Volný čas Reálie a kulturní studia (významné historické osobnosti) Cestování V restauraci (typická jídla a nápoje) Dialogy k výše uvedeným tématům a psaní osobních dopisů
3.	60	Cestování a cestovní plány V hotelu Životopis a motivační dopis Nákupy Na návštěvě Svátky, zvyky a obyčeje (interkulturně) Počasí Telefonování Psaní osobních dopisů a e-mailů
4.	60	Každodenní komunikace Interkulturní témata v cílové zemi (krátká prezentace + handout) Ekonomický jazyk Telefonické rozhovory (domluvení a potvrzení termínu, rezervace a potvrzení rezervace, požádání o informace apod.) Obchodní korespondence (forma obchodního dopisu: oslovení, úvodní a závěrečná zdvořilostní věta) Poptávka, nabídka E-mail, fax

Semestr	Počet hodin	Tematické okruhy
5. (letní škola) v cílové zemi Česká republika – podpora **AKTION ČR – Rakousko**	60	a) Opakování a rozšiřující informace Interkulturní situace (cestovní ruch, náboženství, dopravní systém, pošta, banka, nová média, politický systém, sociální život, vzdělání a zdravotnictví, tradic a zvyky) V restauraci a kavárně (objednání jídla a pití) Nakupování na místě Orientace a cestování U lékaře Normy chování b) Tandem Každodenní komunikace (seznámení se, popis osoby, povolání …) Koníčky Volný čas + prázdniny Roční období Svátky (interkulturně) Reálie a kulturní studia
5. (praxe)	15 týdnů	„Jazyk v praxi"
6.	60	Reflexe letní školy a pracovní praxe (prezentace + handout) Teorie kultury, kulturní dimenze, kulturní šok,… Obchodní korespondence (nabídka, poptávka, objednávka, …) Telefonické rozhovory Služební cesta, hotel, banka Komunikace a obchodní jednání v cílové zemi (řešení interkulturních konfliktů, předcházení interkulturním konfliktům, nedorozuměním vyhýbání se potenciálnímu riziku,…) Prezentace typického výrobku + handout

Již od první hodiny výuky cizího jazyka jsou studenti připravováni na kontakt s cizojazyčnými kolegy a pobyty v zahraničí. Během prvních tří semestrů se jedná o témata z každodenního života, kdy dochází k senzibilizaci studentů – např. jak pozdravit, jaká jsou pravidla chování, jak se chovat na návštěvě, co je typické, jaká tabu existují, jak napsat soukromý dopis apod. Vždy dochází ke srovnání s mateřským jazykem, kulturou, což vždy ale nemusí být jazyk německý. Ve čtvrtém semestru se výuka koncentruje na interkulturní přípravu pracovního praktika a letní školy. Důraz je kladen především na témata ze světa práce (domluvení termínu, dochvilnost a chápání tzv. akademické čtvrthodiny, psaní obchodních dopisů apod.).

Velice se osvědčilo do výuky cizích jazyků zapojit incoming-studenty, kteří v Eisenstadtu absolvují zahraniční semestr. Incoming-studenti se také aktivně podílejí na přípravě akcí, jako jsou International Christmas, International Eastern a Eisenstädter Europatage (Eisenstadské dny Evropy), které mají dlouholetou tradici.

2.1 Letní jazykové školy a TANDEM – úspěšný projekt Vysoké školy Burgenland

Studenti denního studia absolvují během studia bilaterální třítýdenní letní jazykovou školu v zemi jazyka, který se již čtyři semestry učí (úroveň A2 SERR). Jedná se o příklad praktického získávání znalostí a zkušeností v oblasti kultury, ekonomiky a společnosti. Tato letní škola je pro češtinu podporována AKTION Česká republika a Rakousko a je pro naše studenty povinnou součástí studia. Cílem letní školy je dát studentům možnost učit se jazyk a sbírat interkulturní zkušenosti, seznámit se s kulturou, geografií a historií přímo na místě, jelikož tento kurz absolvují v zemi střední a východní Evropy. Dalším důležitým aspektem je to, že se během letní školy rakouští studenti učí jeden ze středoevropských či východoevropských jazyků a studenti z těchto zemí studují němčinu. Během odpoledních a večerních hodin jsou organizovány společné exkurze do firem,výlety do různých měst, jakož i další rámcový program (zpěv, tanec, kvízy apod.) a společné hodiny TANDEMu, ve kterých je využívána metoda „tandemu", což jinými slovy znamená pedagogika setkání a výměny. Během těchto hodin se dostávají do kontaktu studenti různého jazykového původu a navzájem se učí jazyk partnera. Jedná se tedy vždy o kurzy dvoujazyčné a student je během jednoho tandemu v roli vyučujícího, kdy se pracuje v jeho mateřském jazyce a v roli studenta, kdy se učí svůj cizí jazyk. Vyučující se drží v pozadí, sledují práci jednotlivých tandemů a v případě, že už si tandemy samy pomoci nemohou, zasahují a vysvětlují vše potřebné, a to vždy v tom jazyce, ve kterém tandem právě pracuje. Jedno tandemové setkání je většinou v rozsahu dvou vyučovacích hodin, z nichž se předem stanovenou dobu pracuje v jednom, a stejně dlouhou dobu pak v jazyce druhém. Jazyky nesmí být kombinovány. Na závěr jsou výsledky prezentovány v plénu – nejprve v jednom, a poté v druhém jazyce. Studenti pracují s příručkou *Ve dvou se to lépe táhne / Zu zweit geht es besser!*, kterou vypracoval tým autorů pod vedením Prof.(FH) Anatolie Berditchevského a Frauke Bünde pro jazykovou úroveň A2, existuje i varianta pro pokročilé na úrovni C1. Specifické pro tandem je, že se jedná o autentickou komunikační situaci s rodilým mluvčím, který z první ruky přináší informace o své zemi, jazyce a kultuře. Díky tomuto interkulturnímu setkání dojde k přezkoumání a modifikaci předsudků a klišé. Tandemová setkání jsou skutečná setkání s jiným jazykem a kulturou, která přispívají k lepšímu porozumění jiné osoby i sebe sama. V tomto kontextu se jedná o „učení à la Carte", protože se každý z účastníků tandemu učí s ohledem na svou úroveň a své potřeby. (Bünde, Kunz, Langut, 1999)

Originalita příručky určitě není ve výběru témat, protože se jedná o témata o kterých mohou dva cizojazyční studenti mluvit již při svém prvním setkání (rodina, město, práce atd.), ale v tom, jak jsou témata pro práci tandemů připravena. Vedle pracovních listů je samozřejmě využíván i dodatečný materiál, který připravují učitelé společně se studenty.

Studenti při zaměstnání tuto možnost většinou z časových důvodů využít nemohou, a proto jsou pro ně organizovány letní kurzy (dva víkendy v červenci) v Eisenstadtu.
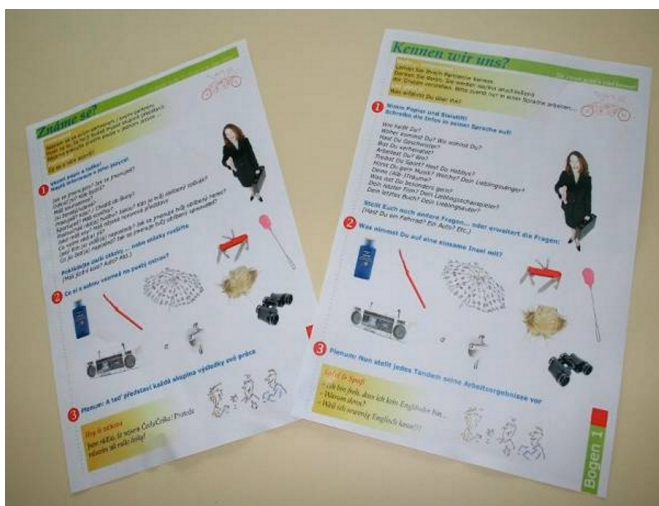
Obr. 1: *Fotografie z Evropského dne jazyků (TANDEM), 26. září 2006*

A jak zajišťujeme interkulturní aspekt pro tyto skupiny? Pro letní kurzy se nám daří získávat lektory přímo ze zemí střední a východní Evropy. Můžeme říct, že „importujeme" zemi a její kulturu na dva víkendy do Eisenstadtu. Hlavním cílem těchto kurzů je zprostředkovat radost z učení se cizího jazyka (radost z mluvení) a zvýšení citlivosti pro interkulturní komunikaci. Výuka je velmi intenzivní, a proto je důležitá rozmanitost didaktických metod a forem vyučování (skupinové prezentace, kvízy, dle možnosti exkurze do zahraničí nebo do Vídně, kde se studenti seznamují se stopami dané kultury v rakouské metropoli).

2.2 Interkulturalita v praxi, reflexe pracovní praxe

Během pátého semestru studenti využívají patnáct týdnů své teoretické znalosti v praxi, a to pokud možno v zemi, jejíž jazyk se učí. Studenti denního studia se v této době seznamují s komunikací v podnicích v zemích střední a východní Evropy. Studenti při zaměstnání pokračují ve výuce v Eisenstadtu.

V prvních hodinách šestého semestru dochází k reflexi vlastních zkušeností z pobytu v zahraničí, například podle následujících bodů:

> Kde jste absolvoval(a)povinnou praxi?
>
> Základní informace o firmě (název firmy, adresa, organizační struktura, výrobní program, roční obrat, dovoz (import) / vývoz (export), pobočky / filiálky
>
> Co jste dělal(a) ve firmě? Jaké byly Vaše úkoly …
>
> Jaká byla atmosféra mezi spolupracovníky (kolegy)? Jak Vás přijali kolegové?
>
> Proč byste chtěl(a)/nechtěl(a) pracovat v takové firmě?
>
> Jaký byl život v zahraničí? Chtěl(a) byste v budoucnosti žít a pracovat v zahraničí? Co jste dělal(a) ve volném čase?
>
> Jaký byl život v Praze? Co je zajímavé v Praze? Jaká další česká města jste navštívil(a)?
>
> Co jste dělal(a) o víkendu? Jak jste trávil(a) víkendy v Praze / v České republice? Jací jsou Češi?

V interkulturní komunikaci se pozornost věnuje kultuře, kulturním dimenzím podle Hofstedeho, kulturnímu šoku a jeho předcházení, seznámení se s kulturními standardy zemí střední a východní Evropy a jejich srovnání s Rakouskem. I zde je v popředí srovnání kultury cílového jazyka zemí střední a východní Evropy s vlastní zemí.

> Příklad úkolu: Popište národní kulturní dimenze České republiky a Rakouska (podle Geert Hofstede) na základě následujícího diagramu: http://geert-hofstede.com/austria.html

Na konci šestého semestru by měli studenti zvládat zvolený jazyk zemí střední a východní Evropy na úrovni B1 SEER pro ekonomický jazyk. Při přípravě jim pomáhá *Testovací praktikum*, které je rozděleno do následujících kapitol:

1. Testy čtení – zahrnují obchodní a úřední dopisy, reklamy, zprávy, komentáře. Úkoly přímo za textem prověřují jeho porozumění.

2. Testy psaní – kontrolují schopnost napsat na základě zadání různé typy textů jako obchodní dopis, program pracovní návštěvy, reklamu či vyplnit formuláře pracovních dokumentů (např. smlouvy).

3. Testy poslechu – nabízí pracovní telefonní rozhovory, pracovní porady, inzeráty, ekonomické zprávy apod. opět spojené s úkoly.

4. Testy mluvení obsahují tři spolu související úkoly, které jsou krátce uvedeny určitou situací. Mohou to být např. telefonní rozhovory, pracovní porady, prezentace firmy či výrobku.

5. Testy lexiky a gramatiky prověřují znalost odborných termínů, slovních spojení, lexiky ve spojení s gramatikou.

6. Testy interkulturní kompetence pomáhají zvládnout nejrůznější interkulturní situace, které jsou založeny například na různém chápání času, pracovní hierarchie, pracovních struktur či odlišné komunikaci. Tato kapitola představuje významnou součást testovacího praktika, protože připravuje absolventy na reálné interkulturní situace, které by měli zvládnout.

> *Pan Graf, Rakušan, pracuje teprve krátkou dobu jako manažer ve filiálce ve Znojmě. Nejdříve měl z přestěhování strach, ale velice rychle si na město zvykl a práce s českými kolegy se mu líbí a nedělá mu žádné problémy. Kolegové mluví německy a on už také docela dobře česky. Po nějaké době ale zjistil, že firmě hrozí velké penále, protože nedodrželi smluvně domluvený dodací termín. Velice rychle zjistil, že jeden z českých kolegů, pan Novák, nese vinu, protože pozdě odeslal dokumentaci. Pan Graf ho na pracovní schůzce pokáral za chybu před všemi přítomnými kolegy. Po tomto incidentu se klima ve filiálce značně zhoršilo a všichni čeští spolupracovníci jdou panu Grafovi raději z cesty.*
>
> Proč? Rozhodněte se pro jednu z odpovědí a odůvodněte svou volbu.
>
> 1. Češi si od cizinců v Česku nenechají nic říct.
> 2. Přímá kritika není v Česku zvykem.
> 3. Pokárání před kolegy je chápáno jako ponížení.
> 4. V Česku se to s dochvilností nebere tak přesně.

Testovací materiály pro ruský a chorvatský jazyk byly již vydány ve vydavatelství E. Weber Verlag v Eisenstadtu.

Interkulturalita a interkulturní komunikace patří mezi důležitá témata, která získávají stále více na důležitosti, a to jak s rozšiřováním Evropské unie, tak i s postupující celosvětovou globalizací a s ní rostoucími migračními pohyby. (Jáklová, 2012)

3   Závěr

Výuka jazyků zemí střední a východní Evropy hraje na Vysoké škole Burgenland, zejména ve studijním programu Mezinárodní hospodářské vztahy, více než dvacet let důležitou roli. Díky jedinečné kombinaci ekonomického vzdělání se znalostmi angličtiny na úrovni C1/C2 a jednoho jazyka zemí střední a východní Evropy (chorvatštiny, češtiny, polštiny, ruštiny a maďarštiny) na úrovni B1, komunikačním schopnostem a interkulturní kompetenci nacházejí absolventi uplatnění jako manažeři pro střední a východní Evropu v mezinárodně úspěšných společnostech – a to buď v centrále v Rakousku, nebo pak přímo ve střední a východní Evropě v oborech účetnictví, controlling, audit, interní audit nebo marketing, prodej, průzkum trhu, zadávání veřejných zakázek atd.

Od první hodiny výuky cizího jazyka jsou studenti připravováni na kontakt s cizojazyčnými kolegy a pobyty v zahraničí. Interkulturalita hraje během celého studia důležitou roli.

1.–3. semestr	témata každodenní komunikace
4. semestr	prezentace interkulturních témat (normy chování, svátky, zvyky, obyčeje, typické výrobky) + ekonomický jazyk
letní škola	interkulturní situace a tandem
5. semestr	pracovní praxe v zahraničí
6. semestr	reflexe vlastních zkušeností z pobytu v zahraničí, komunikace a obchodní jednání v cílové zemi

Tandemová příručka *Ve dvou se to lépe táhne/Zu zweit geht es besser!* (A2) a *Testovací praktikum* (B1) představují významný přínos pro interkulturní komunikaci v německy mluvících zemích.

4 Přílohy – praktické příklady interkulturních úkolů

4.1 *Příklad testu pro interkulturní komunikaci na úrovni A1*

Vyberte správnou odpověď. Máte **10 minut** čas.   /13

1. **Hlavní město** ČR je:

   a) Praha
   b) Brno
   c) Ostrava

2. **Hradčany** jsou:

   a) V Brně
   b) V Ostravě
   c) V Praze

3. **Nováková** je:

   a) příjmení muže
   b) příjmení ženy
   c) příjmení ženy i muže

4. **Svíčková s knedlíkem** je:

   a) polévka
   b) hlavní jídlo
   c) moučník

5. **Karel čtvrtý** byl:

   a) český král
   b) český politik
   c) český zpěvák

6. **Karel Čapek** byl:

   a) český politik
   b) český spisovatel
   c) český sportovec

7. **Vltava** je:

   a) jen řeka

b) řeka a symfonická báseň Bedřicha Smetany
c) jen symfonická báseň Bedřicha Smetany

8. **Karlův most** je:

   a) v Praze, v centru
   b) v Praze, na okraji města
   c) v Brně

9. Jiný název *(andere Bezeichnung)* pro **Českou republiku** je:

   a) Češka
   b) Čechy
   c) Česko

10. **Trasa A, B, C (áčko, béčko, céčko)** je označení pro:

    a) metro v Praze
    b) metro v Brně
    c) metro v Praze i Brně

11. **Mobil** je české označení (*tschechische Bezeichnung)* pro:

    a) Auto
    b) Handy
    c) U-Bahn

12. **Anrede für eine Frau ist:**

    a) pane …
    b) panno …
    c) paní …

13. **Anrede für einen Mann** ist:

    a) pane …
    b) panno …
    c) paní …

4.2 *Příklad ústního přezkoušení na úrovni A2*

- Voláte do firmy ABC s.r.o. Praha. Chcete mluvit s paní Veselou, ale vytočil(a) jste špatné číslo, omluvte se. Teď máte správné číslo. Mluvíte se sekretářkou, protože paní Veselá má právě jednání. Zanechte svoje telefonní číslo a požádejte, aby vám paní Veselá zavolala zpátky, protože domluvený termín nemůžete dodržet a chcete si domluvit nový.

- Dostal(a) jste pozvání k osobnímu vstupnímu pohovoru ve firmě ABC s.r.o. Praha. Představte sebe i vysokou odbornou školu, odpovězte na otázky kolegy, který je ve funkci vedoucího osobního oddělení.

4.3 *Interkulturní úkol A2*

Jedete navštívit Petru Novákovou, studentku z Brna, s kterou jste se seznámil(a), když absolvovala zahraniční semestr v Eisenstadtu. Odpovězte na otázky:

- Musím přijít přesně? ano ne

- Jak se představit rodičům, sourozencům? Jaká gesta použít? Komu tykat a komu vykat?

- Mám přinést dárek ano ne
  - Pokud ano, co _____

- Co se říká před jídlem?

  _____

- Vhodná témata při stolování:

  _____

- Pravidla stolování:

  _____

4.4 Příklad testu pro interkulturní komunikaci na úrovni B1.

Vyberte správnou odpověď:

a) Když půjdete v ČR na návštěvu, vezmete s sebou:
   - žádné květiny
   - sudý počet květin
   - lichý počet květin
   - na počtu vůbec nezáleží

b) Když se zeptáte českého dodavatele „Jak se máte?", odpoví vám asi s největší pravděpodobností:
   - Ujde to.
   - Nestojí to za moc. …
   - Dneska se mám výborně.
   - Děkuju, dobře, a vy?

c) Plánujete služební cestu do ČR. Jaké dárky zvolíte?
   - žádné, protože by to mohlo být interpretováno jako podplácení
   - typický dárek z Rakouska, např. víno
   - něco hodně drahého, aby partner viděl, že si ho vážím
   - jen nějaké propagační materiály

d) Chcete začít small talk. Jaké téma byste v ČR zvolil(a)?
   - počasí a koníčky
   - jaderné elektrárny a Benešovy dekrety
   - město, kde žijete
   - politická situace

e) Seznámíte se v ČR s novými obchodními partnery. Jakou formu oslovení zvolíte:
   - onikání
   - vykání
   - tykání
   - to záleží na situaci

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Bionote

Prof.[(FH)] **Mag. Ludmila Waschak**, e-mail: ludmila.waschak@fh-burgenland.at, Fachhochschule Burgenland Eisenstadt, Austria
Expertýza autorky spočívá ve výuce cizích jazyků a výzkumu v oblasti didaktiky a metodiky cizích jazyků a interkulturality.

casa

Focus on LSP

In what respect are they similar?: A practical guide to adjectives with -ideus in anatomical terminology

Jozefa Artimová

Abstrakt: V učebniciach medicínskej latinčiny sa často stretávame so zjednodušujúcou kategorizáciou niektorých sufixov. Adjektíva so suffixoidom -ideus/-idalis, by mali označovať podobnosť s materiálnymi objektami, no táto motivácia je prítomná iba u malej časti pomenovaných anatomických štruktúr. Práca poskytuje prehľad a kategorizáciu týchto adjektív tak, aby s ňou mohol efektívne pracovať aj študent, ktorý sa s anatómiou iba zoznamuje.

Introduction

Medical anatomical terminology comprises a fairly systematic corpus of terms of ancient origin, which is built on common and productive word-forming components as well as on functioning word-formation principles and rules. Standardized adjectival suffixes are counted among distinctive, and both semantically and morphologically well classifiable derivational elements of the medical vocabulary. Adjectives with Latin suffixoids[1] *-ideus* and *-idalis* are traditionally believed to denote a resemblance to the object designated in the stem, and are often praised for their semantic clarity, their potential to introduce ancient realia to a student, and their ability to facilitate the learning and prolong the retention of such knowledge. Nevertheless, even if the aforementioned suffixoids are treated frequently in the scientific literature[2] and the semantic relationship between the *objects* and *names* appears self-evident, when examined closer, the relationship is rather complex and the point of similarity between anatomical structures and material objects is less straightforward. The case is, for the most part, demonstrated on material taken from the works of the most prominent medical writer, Vesalius, who sums up the previous medical knowledge in Latin.

Historical overview

Latin suffixoids *-ideus* and *-idalis* originate from the Greek adjective suffix -ειδής, -ές (after Greek εἶδος – shape, form) and are classified as a subdivision of the productive group of Greek adjectives in -ης and -ες. Buck & Petersen[3] suggest that the semantics of adjectives with the Greek suffix -ειδής, -ές is built not only on the original etymology denoting alikeness, but also on the group of etymologically unrelated adjectives with the suffix -ώδης (after Greek ὀσμή/ὀδμή smell, odour) which, due to the attenuation of the meaning, gradually shifted into denoting any kind of similarity or

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[1] The use of term *suffixoid* after Šimon & Marečková (2012:206)

[2] Hyrtl (1880), Ahrens (1977), Buck & Petersen (1945), Marečková (1999), Poláčková & Džuganová (2000), Šimon & Marečková (2012).

[3] Buck & Petersen (1945:697–698)

possession. The fusion of the meanings, they suppose, was possible owning to the figurative use of the term smell (e.g. ἐργώδης difficult, toilsome, one that smells of work or troubles), as well as the orthographic similarity of the two suffixes. The high frequency of adjectives with suffixes -ειδής/-ώδης in the ancient Greek proves that the similarity of objects in general ranks among the most productive morphosemantic rules[4], hence it is not surprising that it was successfully employed in medical, and especially in anatomical, terminology.

The process of incorporating and adapting Greek adjectives ending in -ειδής into Latin medical terminology was not described in detail as the phonological and orthographic qualities of the ancient manuscripts vary frequently[5]; with the Renaissance, however, these adjectives typically appear within Latin medical texts in Greek, side by side with explanations to their meaning, as Greek was no longer widely understood[6]:

> Inferior huius processus [TA processus coracoideus] pars exacte laevis est, ac instar antiquae Graecorum literae C cavus, ob idemque etiam σιγμοειδής appelatus. Alii vero a quadam imagine, quam obtinet cum altera anchorae parte, quae terrae infigitur, ἀγκυροειδή hunc processum vocarunt. Nonnulli rursus, quod corniculae rostri modo inclinatur, κωρακοειδή appellavere.

Since the end of the 16th century, the process of adaptation has accelerated. The Greek adjectives with -ειδής were gradually replaced by their Latin counterparts, either preserving original Greek orthography (*-ides*), or incorporating them to the Latin system of declension as *-ideus*. Bauhin[7], presumably consciously, distinguishes between the two endings; the Greek suffix *-ides* is used when he denotes *similarity* between a material object and anatomical structure, but when he aims to denote *reference* or *relation* to a structure; he employs the ending *-ideus*. Nevertheless, this tendency seems to have been lost quickly, as the two endings are used unsystematically by later authors (Spigelius, Bartholinus), with the Latin one, *-ideus*, finally gaining prominence. Soon, the suffixoid *-ideus* was used in both the names of anatomical structures where similarity or resemblance is denoted and the names of structures referring only to spatial, functional or other relation. Adjectives with *-idalis* (e.g.

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[4] Horecký (1982:199)

[5] Langslow (2000:78 ff.)

[6] Vesalius, Fabrica 1, 27: The lower part of this process is quite smooth and concave like the ancient letter C, so that it is called *sigmoid*. Nevertheless others, based on the appearance that an anchor gains when it has one part fixed in the ground, have called this process *ancyroid*. Yet others have called it *coracoid*, because it bends like a beak of a crow.

[7] Bauhin (1605:997) Latin 'Musculi *cricoarytenoidei* laterales a *cricoide* cartilagine exoriuntur' translates: Lateral cricoaryten*oidei* (in Latin word ends in form of the ending -ideus, muscles are related spatially to the cartilage) muscles are muscles that arise from a cric*oeid* (in Latin word ends in form of ending -ides, because the cartilage has the shape of ring) cartilage.

ethmoidalis, glenoidalis) can be explained as secondary imports from French (*[os] ethmoïde: ethmoïdal*). TA[8] re-introduced one such adjective, helicoidalis[9].

With the first internationally accepted Anatomical nomenclature, BNA, thirty-four such adjectives became official terms and together with their derivatives gave names to almost three hundred anatomical structures. Only minor changes occurred within that list thereafter. A few adjectives from the first edition were later neglected due to different interpretation of anatomical structures (*adenoideus*[10]*, bulboideus*[11]) or superseded by terms that were considered to be more appropriate (*haemorrhoidalis* BNA → *analis* INA → *rectalis* PNA+TA; *condyloideus* BNA → *condylicus* INA → *condylaris* PNA+TA).

The most significant changes were introduced by the INA, but these were only of interim character. The INA replaced several adjectives of Greek origin with Latin terms > ([*processus*] *clinoideus* > [*processus*] *alae parvae/dorsi sellae*; *xiphoideus* > *ensiformis*; *intercondyloideus* > *intercondylicus*; *haemorrhoidalis* > *analis*; *subarachnoidalis* > *leptomeningicus*) and omitted all adjectives with suffix *-idalis.* Instead, a strict and purposive distinction between adjectives expressing the similarity (Greek suffix *-ides*), and those expressing spatial, functional or other relation or reference to another objects was introduced (Latin suffix *-ideus*), e.g.:

colon sigmoides: portion of the large intestine being similar by its shape to the letter C (so called sigma lunatum)	*arteriae sigmoideae*: two arteries that pass obliquely downward to the sigmoid colon
os sphenoides: bone being similar to the wedge	*lingula sphenoidea*: pointed process on the sphenoid bone
musculus deltoides: triangular muscle shaped like Greek letter Δ (delta)	*ramus deltoideus*: branch of thoracoacromial artery that supplies the deltoid and pectoralis major muscles

This distinction enabled a user of anatomical terminology, especially an uninformed one or beginner, to identify the structures where similarity with a material object is to be considered promptly; however, with the following nomenclatorial modifications,

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[8] The following abbreviations stand for different editions of the International anatomical nomenclature within the text. BNA stands for *Basiliensia nomina anatomica*, INA stands for *Ienaiensia nomina anatomica*, PNA stands for *Parisiensia nomina anatomica*, NA stands for later editions of PNA, particular edition is marked separately by the year when it was published, TA stands for *Terminologia anatomica*.

[9] First time employed by Carey (1921:189 ff.) *stratum helicoidale gradus longi/brevis,* to describe the disposition of fibres in the muscular layers of the small intestine wall that have form of a spiral with a long and short pitch, orig. *stratum circulare.*

[10] Nowadays the term is used only in the clinical terminology, e.g. *diathesis adenoidea.*

[11] Originally, *corpuscula nervorum terminalia bulboidea* syn. *corpuscula bulboidea (Krausii)*, the structures have been later removed from the category of the sense-organs (Fitzgerald 1962:189 ff.).

the distinction was neglected. All adjectives with suffix *-ides* were reverted back into Latinized suffix *-ideus*; several adjectives with suffix *-idalis* (e.g. *ethmoidalis, rhomboidalis, sphenoidalis, subarachnoidalis*) have been reintroduced by the PNA. Further changes have been confined to orthographical adjustments that appeared in NA 1989[12], such as monophthongization of diphthongs within the stem (aryt*ae*noideus > aryt*e*noideus, sph*ae*roideus > sph*e*roideus) or reduction of vocalic groups on the morphemic border[13] (thyr*eoi*deus > thyr*oi*deus, chor*ioi*deus > chor*oi*deus). This reduction did not apply to the adjective *hyoideus.*

Semantics, translatability and comprehensibility

The survey of the extensive list of Greek adjectives with suffix -ειδής, -ές by Buck & Petersen shows that ancient medical writers reach for adjectives with these endings when they refer to some general meaning (e.g. ἀ(ν)ειδής formless, indistinct; διαειδής transparent; εὐειδής well or properly shaped, beautiful; δυσειδής not properly shaped, ugly, asymmetrical; ὁμοειδής of the same species or kind, uniform, homologous), or when they intend to describe different shapes and qualities. As the source of motivation they use a wide variety of material objects, such as:

- *Consistency or composition*, e.g. σπογγοειδής spongy (of the bone structure); ἐλαιοειδής oily (of the bodily fluids and discharge)
- *Geometric figures and shapes*, e.g. (τρι)γωνοειδής (tri)angular (of sutures); κυβοειδής cubical (of the bone shape)
- *Letters of the Greek alphabet*, e.g. πιοειδής shaped like the letter πῖ (of the emplacement of the large intestine); λα(μ)βδοειδής shaped like the letter λά(μ)βδα (of the suture)
- *Colour of objects*, e.g. μολυβδοειδής pale as lead (of the colour of lungs); φλογοειδής fiery-red, inflamed (of skin)
- *Household utensils,* e.g. κοτυλοειδής cup-shaped (of socket or cavity of a joint); ἠθμοειδής like a strainer, perforated (of one of nasal bones)
- *Military objects*, e.g. σαλπιγγοειδής trumpet-like (of oesophagus); θυρ(ε)οειδής shield like (of cartilage)

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[12] cf. Marečková (1999:26–27)

[13] Longer forms, with an extra vocal -i- appeared in BNA based on the Kühn's edition of Galenic texts from 1821. It was argued that the adjective choroides without an extra -i- vocal is not derived from Greek chorion (membranous sac enclosing the embryo) but from the word choros (dance), or that the adjective thyroides comes from Greek thyra (door) instead of thyreos (shield). The longer forms were accepted by BNA, despite Hyrtl's (1880: 261 ff.) comments that both longer and shorter forms are well established and correct. After corrections by INA, longer forms were reintroduced by PNA and were valid until the 1989 edition of NA.

Motivation leads us to understand the semantic connection between a derived, special, and primary meaning of a given word. With an indirect motivation, which is based on a simile or metaphor, it can be difficult to specify the point of similarity between the primary object and anatomical structure to which the adjective applies in its derived meaning. The meaning of the rare adjective πυρηνοειδὴς , for example, is motivated by its similarity with the stone of the fruit; nevertheless, dictionaries suggest that a stone from a variety of fruits – olive, pomegranate, medlar, myrtle, elderberry, date and edible nuts – or even fish bones could be considered here. Indeterminateness of form not only hinders a term's comprehensibility (as it is difficult to establish the point of similarity), but it has also consequences for its translatability.

When the adjective πυρηνοειδής is used by Rufus[14] in the description of *dens axis* (process projecting from the upper surface of the body of the second cervical vertebra), it is obvious that further explanation is needed to translate the adjective successfully. The problem with establishing the point of similarity and understanding the adjective πυρηνοειδής is observed both in Vesalius[15], who tries to explain it by a group of similes to different pointy objects – a canine tooth, a pine cone, the top point of a pyramid and others – as well as centuries later in Gersh' translation of Onomasticon from 2014[16].

In what respect are they similar?

Nevertheless, different kinds of problems, even misunderstandings, can occur also when well-known and frequently used adjectives with the suffixoid -ideus are examined closer. For example, the three cartilages of larynx are known as thyroid (Fig. 1), cricoid (Fig. 2) and arytenoid (Fig. 3) and translated as shield-like, ring-like and laddle-like cartilage, respectively. However, when looking for the actual point of similarity between anatomical structures and material objects in anatomical atlases, only the shape of the cricoid cartilage is readily identifiable.

Principally, three difficulties need to be overcome when we look for the points of similarity between ancient objects and anatomical structures. (1) *The original term may result from the observation of a different object than that used nowadays.* We often forget that anatomical structures, especially those with a long history, were not given names upon the observation of a human body, but that of an animal. The difference between various species can be substantial, and in a human body the point of similarity can be absent. For example, the thyroid cartilage (gr. θυροειδής), together with other cartilages of the larynx was very difficult to observe on human bodies,

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[14] Rufus, Onomasticon 156 (cf. Daremberg): Ἡ δὲ τοῦ δευτέρου σφονδύλου εἰς τὸ ἄνω καὶ ἔμπροσθεν ἀπόφυσις, πυρηνοειδὴς καλεῖται. (The upper and frontal projection of the second vertebra is called "stone-of-fruit-like".).

[15] Vesalius, Fabrica 1, 15

[16] Gersh (2012:62) and Garrison & Hast (2014:134)
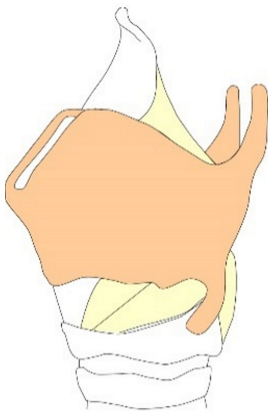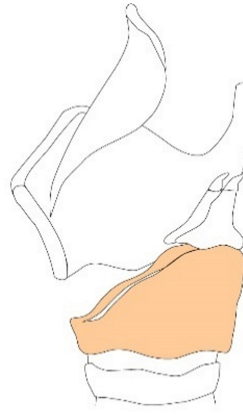
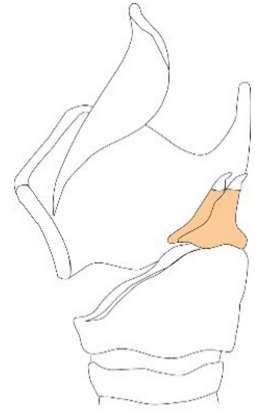Fig. 1   Fig. 2   Fig. 3
(Cartilages of Larynx, Fig. 1 – cartilago thyroidea, Fig. 2 – cartilago cricoidea, Fig. 3 –
cartilago arytenoidea, redrawn from various sources)

as majority of dissections in the 16th century were performed on bodies of convicts, who were often hanged and had their larynxes destroyed by the noose. This is the reason why Vesalius in his public demonstrations uses the larynx of an ox, a pig and other cattle[17]. If our cultural concept of the shield is based on typical rounded or elongated shield of the classical era, we will probably be able to connect it only to the thyroid cartilage of a pig (Fig. 4), which is oblong, rectangular and has no cut-outs on its superior margin. It also visually corresponds to the shape of a door (gr. θύρα) that was used as a prototype of the protecting arm. The fact that the identical term was preserved also in the human anatomy for the cartilage with a substantially different shape is based on the existence of a modified crescent-shaped light shield called *peltarion* or *pelta* (Fig. 6) that has cut-out somehow similar to the human thyroid cartilage (Fig. 5).

(2) *The association between shapes, functions and names is not a stable one and changes over time.* The second cartilage of larynx is called cricoid (gr. κρικοειδής, Fig. 8), ring-like, and its circular shape truly resembles the ring. Moreover, some anatomical atlases[18] specify its signet-like shape (Fig. 7). But besides *krikos* (κρίκος) there are at least four other terms for rings in the ancient Greek (δακτύληθρον, δα-κτύλιος, κιρκίον, σφραγίς), therefore one could ask why *krikos* was used, if all rings are circular, and whether the point of similarity really lies in the circular shape.

The answer could be easily found in medieval atlases. Archery was still quite common and a specific archer's ring, with a lowered and narrowed posterior part and an

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[17] Garrison & Hast (2014:183)
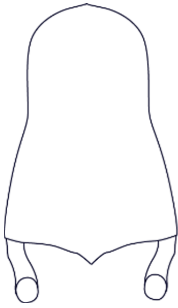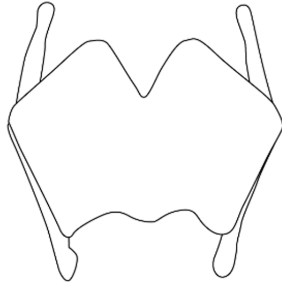
[18] Dauber (2001:168)

Fig. 4   Fig. 5   Fig. 6
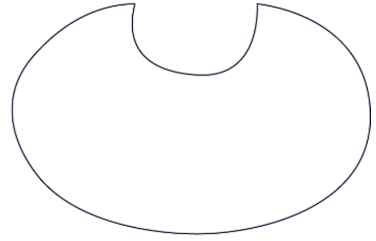
(Cartilago thyroidea, frontal view, Fig. 4 – c. t. of Sus scrofa domestica, redrawn form Wysocki et al. (2010:340), Fig. 5 – human c. t., schematic, Fig 6. – peltarion, a shield, schematic)
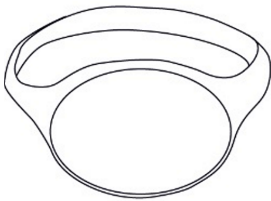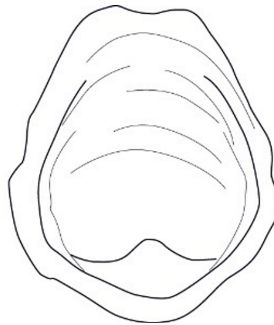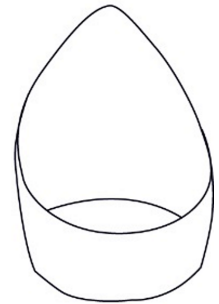
Fig. 7   Fig. 8   Fig. 9

(Fig. 7 – a signet, schematic, Fig. 8 – cartilago cricoidea, human, dorsal view, Fig. 9 – archers ring, schematic)

elevated and broadened anterior part, called *krikos*, was commonly used to protect the inner side of archer's thumb when drawing a bow (Fig. 9). The problem with finding the original motivation arises in this case from our cultural background, which interferes with connotations that are absent in the ancient material reality.

(3) *The semantic clarity of the term can be also blurred by its translation.* The last cartilage of the larynx, the laddle-like or arytaenoid (gr. ἀρυταινοειδής), is the smallest of the three. Today, when we are familiar with its structure, many atlases depict it as two triangular or pyramid-like objects (Fig. 12). In Vesalius' times, however, its anatomical structure was not clarified. Vesalius was the first to realize its twin nature, but a minute corniculate cartilage on the top of the arytenoid one was described much later. From Vesalius comments on the name of the cartilage, a certain ambiguity is perceivable:

> Tertiam laryngis cartilaginem Graeci vocarunt ἀρύταιναν et ἀρύταινοειδῆ, …, quod illi ollarum parti simillima sit, qua aquam manus lavaturis affundimus. Illi namque ollarum oris sedi aptius congruit, quam ligneis illis conchis, quibus nautas sentinam exhaurire, ac olitores irrigare hortos conspicimus. Siquidem et eiusmodi situlis seu vasculis Graeci hanc cartilaginem contulisse videntur, non quidem toti vasi, sed ipsius mucroni[19].

Vesalius argues that if Greeks used the word for the vessel to name the cartilage, they did not mean the whole object, they had in their mind only its spout (figs. 10a, 10b, 11).
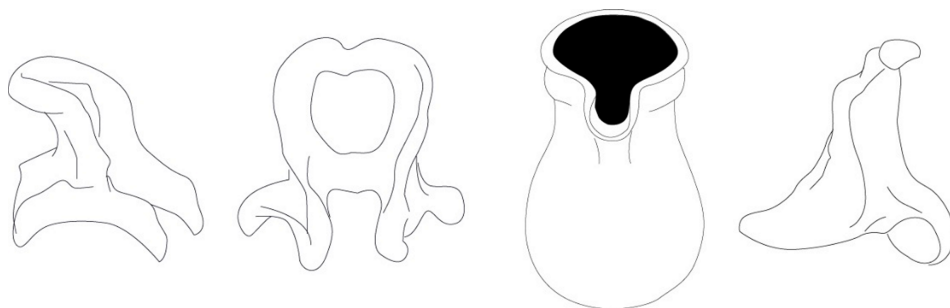
Fig. 10a   Fig. 10b   Fig. 11   Fig. 12

(Fig. 10 – cartilago arytenoidea redrawn from Vesalius, Fabrica (1543: 2, 21), lateral view (a), inferior view (b), Fig. 11 – a pitcher with a spout, schematic, Fig. 12 – cartilago arytenoidea, redrawn from Daubner (2007:169C))

Nevertheless, during the era of national medical languages, equivalents to the Greek adjective ἀρύταινοειδής reflected the original motivation, the name of the vessel, which in some languages (lat. *cartilago guttur(n)alis*, germ. *Gießbeckenknorpel,* hung. *a kannaporc*, pol. *chrząstka nalewkowata*, slov. *krhlovitá chrupka,* rus. черпаловид-ный хрящ) can easily became a source of confusion.

How to use adjectives with -ideus successfully

Building on the Anatomical nomenclature of Jena (INA), medical dictionaries[20] and historical sources, it is possible to conclude that in the majority of cases the adjectives ending in -ideus are used to name the structures where reference to the resemblance

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[19] Vesalius, Fabrica 2, 21: The Greeks called the third cartilage of the larynx "arytaina" and "arytainoeide", …, as it would be very similar to that part of a pitcher with which we pour water to wash hands. As a matter of fact it more closely resembles that part of the mouth of jars, than those wooden shell-like vessels, with which we see sailors drain the bilge water, or gardeners water their plots. Anyhow, if the Greeks indeed seem to have compared this cartilage to vessels or small containers, they did not compare it to the whole vessel, but to its tip.

[20] Zieliński (2004), Marcovecchio (1993), Dvořák (1960), Hyrtl (1880)

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of the object designated in the stem is not materialized and may even be misleading. Here we offer a basic instruction manual containing the majority of adjectives ending in -ideus used in the current version of anatomical nomenclature TA and not approached by other works[21]:

1. None of the adjectives ending in -ideus derived with extra prefixes denotes similarity. In fact, the prefix of such adjective is a reliable sign of the spatial relation to the object named by the original adjective with ending in -ideus but without the prefix, e.g.: *periamygdaloideus* denotes position around the corpus amygdaloideum, *interarytenoideus* denotes position between twin arytenoid cartilages.

2. None of the compound adjectives ending in -ideus denotes similarity. Such compound adjectives are terms designating muscles, ligaments, articulations or veins, arteries and nerves that supply or innervate the structure, a few terms designate sutures, lines and recesses, which form natural borderlines between anatomical structures. A compound adjective ending in -ideus then designates two anatomical structures that are connected or separated: *m. thyrohyoideus* arises from the oblique line of the thyroid cartilage and inserts on the greater horn of the hyoid bone, is accompanied by the thyrohyoid membrane and ligament, and innervated by thryrohyoid branch of the nerve loop C1-3. *Palatoethmoidal suture* is a borderline between the palatal and ethmoid bones.

3. Four adjectives with -ideus where the stem denotes some geometrical shape only adjective *conoideus*, *cuboideus*, *rhomboideus* and *trapezoideus* name structures with shapes denoted by the stems. The adjective *cylindroideus* was replaced by cylindricus; adjectives naming types of joints – *articulatio ellipsoidea, sphaeroidea* and *trochoidea*, were chosen inappropriately. The joint itself does not have the shape of an ellipse, sphere or wheel; it is the shape of the joint's head they refer to. Only a few anatomical structures really have geometrical shapes, these are: *os cuboideum* and *trapezoideum*, *ligamentum conoideum* and *trapezoideum, area trapezoidea* and *corpus trapezoideum* and finally *fossa rhomboidea* and *musculus rhomboideus*.

4. Also there are four adjectives with -ideus where the stem denotes a letter of the Greek alphabet – *deltoideus*, *hyoideus*, *lambdoideus* and *sigmoideus*. Those where the motivation corresponds to the shape of letter are: *os hyoideum, ligamentum deltoideum* and *musculus deltoideus, sutura lambdoidea*, *colon sigmoideum* and *sinus sigmoideus*. When it comes to the shape that should to be associated with letter sigma, it is not our S, or the Greek Σ, but so called sigma lunatum, which is our letter C[22].

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[21] esp. Šimon & Marečková (2012)

[22] Wright (1896), Šimon & Marečková (2012:209)

5. With adjectives that refer to seed and nut – *sesamoideus* and *amygdaloideus* – the point of similarity does not lie in their shape, but in their size. While the term *corpus amygdaloideum* is quite a new invention (introduced in PNA 1955 to replace *nucleus amygdalae*, it was chosen on the base of the similarity of the nucleus to a swollen almond), *os sesamoideum* is of Galenic origin, and the bone(s) it refers to, were by ancient authors thought to be the smallest and the hardest bones of the human body.

6. Household utensils and furniture were the motivation for three adjectives. The adjective *clinoideus* refers to three pairs of projections on the sphenoid bone, which are similar to legs of a table or litter. This adjective has no derived forms. It is used to refer to clinoid processes of the sphenoid bone exclusively. The Slovak equivalent *naklonený* inclined, probably comes from the Russian на-клоненный. The adjectives arytenoid and ethmoid refer to household utensils. *Aryt(a)enoideus* (lit. spout-like) is used to name different parts of the twin cartilage (apex, basis), but in the rest of the terms it indicates only a relationship to the cartilage. The adjective ethmoidalis (gr. ἠθμοειδής like a strainer) is of Galenic origin. The term was motivated by perforations on *lamina cribrosa* (lat. *cribrum* sieve), which is nowadays distinguished as a specific part of the ethmoid bone. However, the motivation is not reflected in Slovak or Czech equivalents, because it was reserved for the *lamina cribrosa.*

7. There are four adjectives motivated by the internal structure of objects. In ancient texts the adjective *arachnoideus* (gr. ἀράχνη spider and its web) is used to describe nerves, capillary veins or branches of an artery and retina based on their delicate character. The circular organization and reticulate shape of the cobweb were not semantically important for its usage in the medical terminology. Two structures – *arachnoidea mater cranialis* and *spinalis*, refer to these qualities. The adjective *chor(i)oideus* was originally used to specify quality membrane covering the ventricles of the brain, but also the meninx of the brain, and one of the membranes covering the eye. It is the vascular character (κατάφλεβος) of all of these membranes that associates it with the membrane enclosing the foetus in the womb chorion (gr. χόριον). Currently the vasculose character is present in the two structures – the vascular coat of the eye between the sclera and the retina (*choroidea*) and the vascularised villous plexus of the brain ventricles (*plexus choroideus).* Other terms imply only relatedness to it. The usage of the adjective *hyaloideus* is also interesting. Originally it was used for the membrane encompassing the vitreous humor (ὑαλοειδὲς ὑγρόν) and was referred to because of its transparency, which resembles glass. Nevertheless, the membrane for which the name was intended is nowadays called vitreous using the Latin equivalent *vitreus* instead of the Greek one *hyaloideus.* The three structures where the adjective is still used (arteria, canalis, fossa) are only parts of the corpus vitreum and membrana vitrea, so again only spatial relatedness is expressed by the adjective.

Acknowledgement

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Bionote

Mgr. Jozefa Artimová, PhD., e-mail: artimova@mail.muni.cz, Masaryk University Language Centre, Faculty of Medicine Department
Jozefa Artimová is a senior lecturer of Latin for medical purposes. Her research concentrates on the field of comparative linguistics, terminology and its translation, and history of medical terminology.

Master Claretus' Early Didactic Writings on Medicine

Libor Švanda

Abstract: Claretus (Bartholomaeus de Solentia) is known as the author of the oldest Latin--Czech dictionaries, but the aim of the article is to introduce his didactic poems *Medicaminarius* and *Complexionarius*. Although quite a number of similar school texts were created during the Middle Ages, not many of them originated in the Czech lands. They provide an insight into medical theory as it was taught in Bohemia in the mid 14th century.

Key words: Medieval Literature, Latin Literature, Didactic Poem, Claretus, Medicine

Abstrakt: Bartoloměj z Chlumce, zvaný Klaret, je známý jako autor nejstarších latinsko--českých slovníků. Velikost jeho slovníkového díla a jeho význam pro českou a obecně slovanskou lexikografii zastiňuje Klareta jako autora dalších spisů, mimo jiné i dvou latinských didaktických básní s lékařskou tématikou: *Medicaminaria*, jehož tématem je zdravý způsob života, péče o zdraví, léky a léčba, a *Complexionaria*, který pojednává o čtyřech lidských *complexiones* (temperamentech).

V příspěvku jsou představeny oba Klaretovy texty s lékařskou tématikou jako příklad středověkých učebních textů a je poukázáno na některé jejich formální a obsahové aspekty.

Byť podobných veršovaných učebních textů, jako jsou *Medicaminarus* a *Complexionarius*, vznikla ve stejném období v Evropě řada, v českém prostředí se jich mnoho nedochovalo a obě Klaretova díla tak poskytují cenný vhled do některých oblastí medicíny v Čechách poloviny 14. století.

Introduction

Although the name Claretus is recognized among those who are interested in medieval didactic literature, in history of early Prague University or in Czech (or generally Slavic) lexicology, his writings directly related to medicine are quite unknown and for a long time his authorship was even questioned. People know him as the author of dictionaries from which we may learn a lot about the old Czech language, especially its vocabulary, and about the way of learning a language at that time. It is clear that Claretus' lexicography works overshadow his other writings. The aim of this article is to show that his other texts deserve our attention as well. Since we are in the context of medical terminology or history of medicine, it is an opportunity to publicize his didactic poems *Medicaminarius* and *Complexionarius*.

Author

We do not know much about Claretus and we have only a few clues from his works. Although there were some attempts during the 20th century to identify him with people that we know about from elsewhere (e.g. Petrus Clarificator, prior of the monastery in Roudnice nad Labem, or doctor M. Bartoloměj of Hostýň), these were

not successful.[1] In one of his works Claretus calls himself *Bartholomeus de Solencia dictus Claretus* (a neologism which means 'famous', derived from the verb *claresco, -ere* meaning 'to become famous').

Claretus was probably a son of an unknown clergyman in Solencia (Chlumec nad Cidlinou – town in eastern Bohemia). He became a student and teacher at the monastic school in Opatovice, later moving to Prague where he was probably one of the first Prague university graduates. Subsequently he became a teacher and even the *rector* at St. Vitus Cathedral School in Prague, which was the most important school of that type in Bohemia. As for his professional status, his commentators call him simply *Magister* ('Master'), which means *Magister artium* ('Master of Arts') in this context. Most probably he was neither monk nor doctor, otherwise it would be mentioned by the commentators. He died in Prague circa 1370.[2]

Writings

The number of Claretus' writings that we know about is 10. Both pieces that we focus on – *Medicaminarius* and *Complexionarius* – were written together with *Astronomicus* at the very beginning of Claretus' career – probably before he came to Prague, already at the monastic school in Opatovice roughly in the mid 1340s.[3] Not much later he composed *Secundus liber de naturalibus*, but he was already a teacher and rector of the above mentioned cathedral school in Prague when he wrote his famous dictionaries *Vocabularius, Bohemarius* and *Glossarius* and the other texts with the titles *Enigmaticus*, *Ortulus phizologye* and *Exemplarius auctorum* (unfinished). It is possible that some of his students or colleagues took part in writing some of Claretus' later texts.[4]

Medicaminarius (718 verses) belongs to the genre of *regimina sanitatis* (*regimen sanitatis* – 'rule of health'), so it contains recommendations and instructions how to stay healthy. The author writes about exercise, rest, food, remedies and medical treatment. In general: the content of *Medicaminarius* more or less covers what was already in the Galenic theory of health and disease called *res non naturales* (non-naturals): the physiological, psychological and environmental conditions that affect health (air, food and drink, motion and rest, sleep and waking, repletion and excretion, passions and emotions).[5] Scholastic medicine adopted this concept from the old Hippocratic-

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[1] Bartoš (1933: 153–157), Ryba (1943: note 4), Bartoš (1943–1944: 143–147).

[2] Vidmanová (1980: 216, 223).

[3] Vidmanová (1980: 216–217).

[4] For basic information about Claretus and his writings see Nechutová (2007: 184–186).

[5] *Aer, cibus et potus, somnus et vigilia, evacuatio et repletio, motus et quies, accidentia animae.* Generally about the concept *res naturales – res non naturales – res contra naturam* see e.g. King (2001: 44–52), Schmitt (1976: 17–21), Schmitt (1995, 750–752), Siraisi (1990: 100–101), Střelická (2004: 136–143).

-Galenic tradition through Arabic medical writings such as *Canon medicinae* from Avicenna, *Isagoge Iohannitii*, *Liber Pantegni* from Haly Abbas etc.

Complexionarius (944 verses), on the other hand, deals with the *res naturales* (the naturals), which are elements, humours, complexions, body parts, virtues (forces inside the body), physiological processes and a special substance called *spiritus*.[6] The poem describes the four human *complexiones* (temperaments) and puts them into context of these res naturales (talks about elements, humours and complexiones). The human *complexio* is derived from the four elements (earth, water, air, fire) and can be described as a balance of basic qualities (hot, cold, moist, dry), which is determined by the amount of the elements in the human body. The four *complexiones* (temperaments) – sanguine, phlegmatic, melancholic and choleric – are presented and anatomical, physiological and behavioural features which are characteristic for them are described in detail, e.g. choleric individuals according to Claretus have usually big hearts, small heads, cold brains, warm stomachs, red or dark hair, they are tall and have light skin, they are agile, easy to upset, untruthful, talkative, passionate etc.[7]

Structure

Claretus used to compose his didactic poems in verses. Many of them survived with rich commentary in the margins. They were all meant to be school books and their practical use at school was always the main purpose for writing them. Their author had certainly experienced how hard it was for students to learn without understanding what they actually learn, so as a teacher he started writing handbooks in verses in order to make it easier for the students to memorize them and to learn. Such schoolbooks were quite common at that time in western Europe; however, in 14th century there are few authors in the central European region whose literary production is qualitatively comparable with those in the West.

Both poems were used most probably as school texts, but the literary ambition of their author is obvious. As was usual in this genre, they were composed in so-called leonine hexameters[8] (each hexameter with a strong *caesura penthemimeres* and an internal rhyme between a word before caesura and the word at the end of the verse). It needs to be mentioned that if we talk about hexameters or metrum, we mean their medieval form. Medieval poetry is usually *Scheinprosodie*, as it is sometimes called, because the verses were not composed with regard to the natural length of syllables

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[6] *Elementa, humores (compositiones), complexiones (commixtiones), membra, virtutes, operationes (actiones), spiritus*. See Schmitt (1995, 750), Siraisi (1990: 101).

[7] For more characteristics see Švanda (2013, 180–182).

[8] The name is derived from the prose rhythm associated with Pope Leo I.

(long by nature), only the positional length (long by position) was observed, so from the classical metrical system point of view the metrum seems to be corrupted.[9]

The primary purpose for composing a didactic text in hexameters was to help the readers to memorize it, and, together with other literary features, it could also reflect the author's literary ambitions. Short but distinct prologues and epilogues belong among such features in Claretus' texts, and especially the prologues were carefully composed and have a typical structure, as we see in *Medicaminarius* (verses 1–10):

> Suscipe, germane, celer hoc munus, Mariane,
> hoc opus electum, vario de stipite fictum.
> Ex variis libris medicinam collige fibris,
> qua tibi prodesse poteris multisque preesse.
> Omnipotens Domine, confer regimen medicine,   5
> sanans in fine, ne dentur membra ruine.
> Ex causa bina cunctis prodest medicina:
> prodest insanis et sanis et mage canis;
> convalet infirmus, melior fit corpore firmus.
> Hec data scripta lege, medicine te rege lege.[10]   10

Within these 10 verses we can recognize a dedication[11] (v. 1–2), an exhortation (v. 3 to 4,10), an invocation (asking God for help, v. 5–6) and a part which can be called *laus medicinae* (in praise of medicine, v. 7–9).

Similar structure of the prologue can be seen in *Complexionarius* (v. 1–22): dedication (v. 1), exhortation (v. 1–2, 10, 15–16, 20–22), *laus medicinae* (v. 11–14), instead of an invocation we have rather a profession of faith in God's guidance (v. 3–9). The only difference is that there is a content outline of the subsequent text (v. 17–19), which is missing in *Medicaminarius*.

> O bone germane, si poscis vivere sane,
> hec precepta tene, firmans ea pectore plene:
> nam Deus ipse dedit vitam, quam mens mala ledit,
> pastus optando nimios, se peste gravando.
> Hinc Deus in rebus vim liquit et in speciebus,   5
> per quas sanatur animal, corpus medicatur.
> Non tamen inpone spem rebus ea racione,
> sed magis in Cristum, quia stat mors, vita per istum:
> vita resurgendo data, perdita mors moriendo.
> Hunc pete, quod deditam prolongaret tibi vitam.   10

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[9] More about writing poetry in the Middle Ages see e.g. Norberg (2004: 180–186).

[10] Flajšhans (1926: 244).

[11] Both *Medicaminarius* and *Complexionarius* are dedicated to Claretus' brother Marianus.

The Archive of the Prague Castle, Manuscripts of the Library of the Metropolitan
Chapter by st. Vitus, Ms. L 52, fol. 157v

Optima doctrina cunctis fit ad hoc medicina,
que corpus sanat, anime mores quoque planat;
si te non noscis, frustra sanus fore poscis,
nam spernit medicus te sepe videre pudicus.
Noscito naturam nocuam tibi vel placituram;   15
mox te curabis solus morbosque curabis.
Sex debent esse, que sunt tibi scire necesse:
res, elementa, cadens humor, conplexio vadens,
quattuor hinc partes anni cum mensibus artes.
Hec quia si nosses, te solum noscere posses   20
et mala vitares, bona plurima semper amares.
Hec lege non spernens, medicinam pectore cernens.[12]

The epilogues, on the other hand, are very brief in both cases: only one verse (v. 718) in *Medicaminarius*:

Que posui plane, capias, frater Mariane![13]

and three verses (v. 942–944) in *Complexionarius*:

Ecce scies per te, quid sit complexio certe,
omnia cognosces sic, que discernere posces.
Sic, pie germane, vives sanus, Mariane.[14]

That shows that the form of both epilogues is an exhortation to the person to whom the poems are dedicated.

The text itself is divided into chapters: *Medicaminarius* has 22 and *Complexionarius* 21 chapters. The beginning of each chapter is signalized only by a large initial letter. Originally there were no titles for individual chapters, the text within chapters was not structured by any subtitles, marginal notes, graphic features or even by leaving a larger space.

Sources

We do not know what sources were actually used by the author. When he refers to Aristotle (called usually Philosophus), Avicenna or Arnaldus de Villa Nova, he probably knows them only indirectly from florilegies (compilations of excerpts from the writings of popular authorities) that circulated in many versions throughout Europe and were commonly used by many authors.
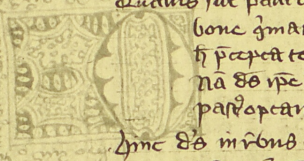
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[12] Flajšhans (1926: 207).

[13] Flajšhans (1926: 270).

[14] Flajšhans (1926: 240).

The Archive of the Prague Castle, Manuscripts of the Library of the Metropolitan Chapter by st. Vitus, Ms. M 108, fol. 33v

In both texts, especially in *Medicaminarius*, we can find many verses that are identical or similar to those in *Regimen sanitatis Salernitanum* (*Flos medicinae scolae Salerni*, 'Salernitan rule of health'), which is a *regimen sanitatis*, allegedly composed in Salernitan medical school, that became very popular in the 14th century. In *Medicaminarius* there are over 50 Salernitan rule of health, although there is no explicit reference to that work.[15] Verses from Salernitan rule of health are not so frequent in *Complexionarius* (its genre is different after all), but whenever you come across them,[16] there is usually an explicit reference, although Claretus does not name the source and refers to it only as to an unspecified *poema* (v. 454)*, dicta poete* (v. 337)*, versus* (v. 600), or *poetica* (v. 796).

When he borrows verses from other sources he usually adapts them so they correspond with his style and type of versification. For metric reasons he often uses periphrastic expressions or synonyms, e.g. when he gives a list of elements in *Complexionarius*, instead of more common terms *terra* and *ignis* he chooses *ops* and *rogus* (v. 28), or where we would expect *terra* and *aqua* he uses the words *tellus* and *latex* (v. 53). Similarly according to the situation he uses either *humidus*, *humens* or *madidus* for 'moist', *calidus* or *calens* for 'warm', *frigidus* or *frigens* for 'cold', *coleratus* or *colerans* for 'choleric' etc.

Manuscripts and edition

We have only two manuscripts with *Complexionarius* and one with *Medicaminarius*. They are preserved in the Library of the Metropolitan Chapter in Prague. The first one (L 52, fol. 149r–168v[17]) is from the first half of the 15th century and contains *Medicaminarius* as well as *Complexionarius*; the second one (M 108, fol. 33v–44r[18]) is older (probably already from the 1360s), but contains only *Complexionarius*. The first one is orderly, it has no commentary in the margins and it was written by one person, while the older manuscript is full of notes: the text itself was written by several different scribes, who added margin notes that make it easier for the reader to follow the text, using red ink, initial letters and even intertextual notes. The rich commentary on both margins was added much later and is not connected directly with the text. Despite the disorderly character of this manuscript we can clearly distinguish the original text from the later additions, which is important for us because we are able to recognize what the original text was and what was added later. On the contrary, in the manuscript L 52 some notes were merged with the text, which made it confusing and more difficult to understand for the reader.[19]

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[15] The parallels are listed in Švanda (2012, 222–226).

[16] Verses 338–339, 455–456, 601–602, 797–798.

[17] Podlaha (1922: 230–231, No 1296).

[18] Podlaha (1922: 334, No 1468).

[19] For codicological analysis see Vidmanová (1978: 193–207).

Medicaminarius and *Complexionarius* were published by Václav Flajšhans in 1926 together with *Vocabularius, Bohemarius* and *Glossarius*.[20] The edition was immediately strongly criticized because the critical apparatus was insufficient, there were many mistakes, few sources were identified, the structure of the text was corrupted by dividing the chapters into shorter parts (the margin notes, which were added later, were adopted as their titles, some notes even becoming a part of the text).[21] On the other hand, the edition made the text accessible for many researchers who were not used to work with medieval manuscripts. It might be surprising that almost 90 years later we do not have a more recent edition but it is not an easy task to accomplish.

Conclusion

Claretus represents a writer whose work is a good example of the didactic literature of his time. Its literary value is not very high as Claretus was an average author in comparison with other writers of that time in western Europe, but we have few such authors in the Central European region in the 14th century. His two didactic poems allow us to take a closer look at the theory of health and disease as it was taught in Bohemia in the middle of 14th century.

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[20] Flajšhans (1926: 203–270).

[21] See e.g. Vilikovský (1928: 442–453), Vidmanová (1978: 193, 197, 206).

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Bionote

Libor Švanda, e-mail: svanda@phil.muni.cz, Masaryk University Language Centre.
Libor Švanda teaches Latin medical terminology at Faculty of Medicine and Medieval Latin at Faculty of Arts of the Masaryk University. He participates on two editing projects: critical editions of *Iohannis Hus Opera Omnia*, vol. 24, and *Chronicon Aulae regiae*.

Rhetorical Moves in Medical Research Articles and their Online Popularizations

Alexandra Csongor and Anikó Hambuch

Abstract: Students, scholars and researchers extensively use Web sources in their works. The online news media commonly translates the content of scientific articles while also influencing the decision-making process of the lay audience. Linguistic studies mostly concentrate on scientific discourse. There have been few studies that compare the language use of research papers and their popularizations. The focus of the study is to investigate and compare the rhetorical structure of research and popular articles by means of move analysis. The analysis is based on an electronic corpus of 60 articles divided into two sub-corpora: 30 Medical Research Articles (MRAs) about prenatal vitamins and nutrition, and 30 corresponding Popular Science Articles (PSAs). The texts in the two sub-corpora were analysed and divided into moves, which mark the content of the particular discourse unit. As a second step, based on the move-analysis of all texts in the corpus, a characteristic move structure for both genres was identified. The results indicate that PSAs have an identifiable pattern. The writers are likely to take over some of the rhetorical moves that are present in MRAs. However, significant structural differences exist between the two text types. The results of these analyses can be useful in assisting non-native and even native professionals in the interpretation and production of both scientific and popular science articles.

Key words: rhetorical move, medical research article, popular science article

Abstrakt: Im Fokus der vorliegenden Studie stehen die Untersuchung und vergleichende Analyse der rhetorischen Struktur von wissenschaftlichen und populärwissenschaftlichen Artikeln. Die Texte wurden auf ihr "move structure" hin analysiert. Die "Move-Analyse" basierte auf einen elektronischen Korpus von 60 Artikeln. Der Korpus wurde in zwei Subkorpora unterteilt: der erste Subkorpus umfasst 30 medizinisch-wissenschaftliche Artikel (MRAs) in den Themen "Pränatale Vitamine" bzw. "Ernährung". Der zweite Subkorpus beinhaltet 30 populärwissenschaftliche Artikel (PSAs), die aufgrund der wissenschaftlichen Artikel des ersten Subkorpus verfasst wurden. Die Identifizierung der Abfolge von "moves" erfolgte in beiden Genres, und zeigte ein erkennbares Muster in den PSAs. Die Verfasser der populärwissenschaftlichen Artikel scheinen einige der rhetorischen "moves" der wissenschaftlichen Artikel (MRAs) in ihren Aufsätzen zu übernehmen.

Abstrakt: Studenti, vědci a badatelé při své práci hojně využívají internetové zdroje. Internetové zpravodajské médium běžně překládá obsah vědeckých článků a také ovlivňuje proces rozhodování laického publika. Existuje málo studií, které srovnávají použití jazyka ve vědeckých statích a jejich popularizacích. Tato studie se zaměřuje na prozkoumání a srovnání rétorické struktury vědeckých a populárních článků prostřednictvím tzv. move analysis, tj. analýzy struktury textu pomocí funkčních kroků. Tato analýza vychází z elektronického korpusu 60 článků, rozděleného do dvou sub-korpusů: 30 článků z lékařského výzkumu (MRAs – Medical Research Articles) o prenatálních vitamínech a výživě a 30 odpovídajících populárně-vědeckých článků (PSAs – Popular Science Articles). Texty v obou sub-korpusech byly analyzovány a rozděleny do tzv. moves (funkčních kroků), které označují obsah konkrét-

ního diskuzního celku. Dalším stadiem, vycházejícím z analýzy všech textů v korpusu, byla identifikace charakteristické struktury funkčních kroků pro oba žánry. Výsledky naznačují, že populárně-vědecké články mají identifikovatelné schéma. Autoři pravděpodobně přebírají některé z rétorických funkčních kroků přítomných v článcích z lékařského výzkumu. Mezi těmito dvěma typy textu však existují významné strukturální rozdíly. Výsledky těchto analýz mohou pomáhat nejen nerodilým, ale i rodilým odborníkům při interpretaci a tvorbě jak vědeckých, tak populárně-vědeckých článků.

1 Introduction

Since the 1990s, as a result of the technological revolution, the world wide web has become a global platform of information flow. The online news media commonly translates the content of scientific articles while also influencing the decision-making process of the audience, both specialist and non-specialist (Entwistle, 1995). Nowadays, it is increasingly accepted, that the results of science are important for everyone. The interaction between science and the news is called *science popularization* (Myers, 2003, Scherer, 2010). This interaction helps the work of researchers to build a bridge between experts and lay people by adding lay perspectives and experience to research, as well as by enhancing lay-professional relationships.

Linguistic studies mostly concentrate on scientific discourse. There have been few studies that focus on popular science articles in the field of medicine or compare the language use of medical research papers and corresponding popularizations.

Two levels of written Medical English are examined in the present study; academic writing and writing about the field of medicine for lay people. The focus of the present study is to investigate and compare the rhetorical structure of research and popular articles by means of move analysis.

1.1 Discourse Structure of Medical Research Articles

Swales (1981) proposed a four-move schema for the introductions of articles. Nwogu (1997) using Swales' (1981) genre-analysis model attempted to identify the structure of information in the Introduction, Methods, Results and Discussion sections. He established an eleven-move schema for the discourse organization in the genre of medical research articles. The structural moves analysis approach was adopted by Fryer (2007, 2012). He identified ten rhetorical moves in this genre. The summary of his model can be seen below. Moves and steps (indicated by numbers and letters, respectively) identified in the corpus of Fryer:

Introduction – to present the study in relation to previous research
  1. *Presentation of study background*
     a) established knowledge
  2. *Identification of gap(s) in existing research*

a) lack of data (or questionable data) in specific area related to established field; b) reason for need to fill gap

3. *Statement of research purpose*
a) hypothesis/objective; b) brief description of material/methodology

*Methods – to describe the selection of study material
and to recount procedure and techniques used to analyze material*

4. *Description of material/participants*
a) size of study sample; b) study period; c) selection criteria; d) type of data collection; e) frequency of data collection; f) study approval/informed consent

5. *Description of experimental procedure*
a) measurements taken; b) definition of terms; c) sample categorization; d) endpoints/outcomes

6. *Description of data analysis procedure*
a) statistical test techniques; b) software

Results – to report data obtained in relation to methodology

7. *Report of observations*
a) reference to non-verbal material; b) main findings; c) associations/correlations (and/or lack thereof); d) adjustments to analysis

Discussion – to interpret results in relation to previous research, to discuss implications of study, and to propose areas for further research

8. *Discussion of main findings*
a) findings in relation to hypothesis/objective; b) comparison with literature; c) possible mechanisms/causes, implications

9. *Study limitations*
a) strengths/weaknesses

10. *Conclusion*
a) main findings; b) implications; c) recommendations/suggestions for future research

(Fryer, 2012, 9)

1.2 Discourse Structure of Science Popularization

The discourse structure of science popularization was examined by Nwogu (1991). In his study he characterized the generic structure of medical texts using Swales' (1981) move analysis approach. Nwogu expanded this theory to the whole texts of science popular articles. His results suggest that the Journalistic Reported Version of research articles have an identifiable schema. Based on his analysis the texts are made up of nine moves.

MOVE 1: Presenting Background Information
- by reference to established knowledge in the field

- by reference to main research problem
- by stressing the local angle
- by explaining principles and concepts.

MOVE 2: Highlighting Overall Research Outcome
- by reference to main research results.

MOVE 3: Reviewing Related Research
- by reference to previous research
- by reference to limitations of previous research.

MOVE 4: Presenting New Research
- by reference to authors
- by reference to research purpose.

MOVE 5: Indicating Consistent Observations
- by stating important results
- by reference to specific observations.

MOVE 6: Describing Data Collection Procedure
- by reference to authors
- by reference to source of data
- by reference to data size.

MOVE 7: Describing Experimental Procedure
- by recounting main experimental processes.

MOVE 8: Explaining Research Outcome
- by stating a specific outcome
- by explaining principles and concepts
- by indicating comments and views
- by indicating significance of main research outcome
- by contrasting present and previous outcomes.

MOVE 9: Stating Research Conclusions
- by indicating implications of the research
- by promoting further research
- by stressing the local angle.

<div align="right">(Nwogu, 1991:115–116)</div>

Stejskalova (2012) studied a corpus of 35 popular science articles in the field of medicine. This study modified the structure of Nwogu based on the analysis of online articles. The texts were collected from similar sources to this work such as The New York Times, Science Daily, and Science News etc. The following moves were identified in the analysis of Stejskalova:

MOVE 1: Presents the background of the research
MOVE 2: Announces a recent finding of the research

MOVE 3: a) Larger context:
    provides general knowledge about the studied issue or fills the gaps in knowledge
    b) Limitation of ongoing or previous research:
    informs about the limitations of the ongoing research or previous studies
    c) Previous study:
    provides information about the related previous studies
MOVE 4: Presents new research and explains the purpose of the research
MOVE 5: Indicates research results in detail
MOVE 6: Describes data collection procedures
MOVE 7: Indicates the main research outcomes and provides their description and explanation
MOVE 8: Provides research conclusions and future implications of the research results

(Stejskalova, 2012, 16)

2   Materials and Methods

The basis of the present study is a corpus of medical research articles (MRAs) and corresponding online popular science articles (PSAs). The present study includes two sub-corpora: 30 medical research articles from prestigious medical journals and 30 online popularized versions of the research articles. They all provide information about recent scientific findings on maternal vitamins and prenatal nutrition. Findings related to medication and vitamins are often presented in prestigious journals and are also often rewritten for the lay public. Most of the MRAs present findings of the latest research about prenatal care as they were written between 2004 and 2013. The popular open access articles were found in the health or science sections of online magazines, such as *The New York Times* and Reuters.

First, the study attempts to characterize the discourse structure of the two genres. The texts in the two sub-corpora were analysed and divided into moves, which signal the content of the particular discourse unit. The moves were identified by recognizing the function and the specific purpose of each text unit with the help of context and linguistic clues. Moves were determined based on the methodologies of Nwogu (1991, 1997), Stejskalova (2012) and Fryer (2012). As a second step, based on the move-analysis of all texts in the corpus, a characteristic move structure for both genres was identified.

3   Results

3.1   Structural Move Analysis of MRAs

The articles in the first study corpus were governed by the IMRAD structure; only three texts were not divided into the traditional format. The analysis of MRAs iden-

tified 11 moves that make up the texts in the corpus. The moves and their discourse function identified within the analysis are summarized in Table 1.

Tab. 1: *Moves and their discourse function in the corpus of MRAs*

Move	Discourse function
M1	Presenting Background Information
M2	Identifying Gaps in Existing Research
M3	Stating Research Purpose
M4	Describing Material/Participants and Data-collection
M5	Describing Experimental Procedure
M6	Describing Data Analysis
M7	Reporting Observations
M8	Discussing Main Findings
M9	Explaining Specific Research Outcomes
M10	Discussing Study Limitations, Strengths and Weaknesses
M11	Stating Research Conclusions

Based on the analysis of 30 texts the most typical is a schema of ten moves. The articles consisted of an average of 9.6 moves, and 15 articles out of 30 are composed of 10 moves. The move explaining specific research outcomes (M9) occurred only eight times in the corpus, all the other moves occurred more than 20 times therefore M9 was considered as a non-typical element of MRAs. The ten moves occurred with varying degrees of frequency in the texts examined.

The articles in the corpus most commonly start with the background information, which is followed by the questionable – or lack of – data in established knowledge. The authors always clearly formulate the objective of the study, which is usually one sentence at the end of the Introduction section. The Methods section follows a rigid format, starting with describing materials/participants, afterwards describing methods of investigation in details and ends with providing the statistical tests performed. The Results section encompasses one move only. The Discussion section compares the obtained results to the literature in that field and to the objectives of the study. This section may contain a move that emphasizes specific, unexpected outcomes or results of great importance. There is an optional move to mention the strengths and weaknesses of the research. The Conclusion section may contain the element of study limitations as well. The articles end with the last move of concluding the results and suggesting future implications.

3.2   Structural Move Analysis of PSAs

The analysis of texts in the second sub-corpus reveals that a typical popular science article embodies the following types of information:

Tab. 2: *Moves and their discourse function in the corpus of PSAs*

Move	Discourse function
M0*	Headline-Summarizing the Most Important Information
M1	Announcement of Recent Research Findings
M2	Presenting Background Information
M3	Reviewing Previous Related Research
M4	Presenting New Research
M5	Presenting Research Results in Detail
M6	Describing Data Collection and Procedures
M7	Indicating Main Outcomes and Explaining Them
M8	Stating Research Conclusions
M9	Indicating the Original Source Article

* This is labelled M0 as headlines are not usually considered part of the text in move analysis.

Two of the moves (M0, M1) occurred in all the 30 texts of the corpus. Move 8 occurred in all but one article, Move 2 in 25 texts, Move 5 and 6 in more than 20 popular articles. These moves are classified as required elements of PSAs. Move 3, 4, 7 and 9 occurred less frequently (<20) in the corpus. These can be classified as optional moves. The typical PSA consists of eight moves, as 16 articles comprise eight moves and the average number of moves is 7.8.

Based on the observations in a typical PSA the headline is followed by announcing the main finding of the research being popularized. This is usually a brief statement of one or two sentences. It is the initiation move in most PSAs and precedes the move of background information. The next move is M2 which functions to provide explanation and established knowledge to the topic. M3 – the review of related research – was found to occur only in 12 texts so it can be considered as an optional element of popular articles. The next move is presenting the purpose of the new research, in several cases alluding to the researchers and in some cases to the original medical paper. Move 4 is usually followed by Move 6, which is concerned with the discussion of data identification, collection and procedure of experimentation. This move partly corresponds with the information found in the first two moves of the methods of a research article. The details are omitted but the most important information is contained in this move and it is a highly frequent element of PSAs. It suggests that authors of these articles presume the methods as important information for lay audiences. Move 5 reports the research result in details. Move 7 was found to occur in 63% of the corpus and its place is not stable in the order of moves. It indicates and also explains the main outcomes. Move 8 is a major move in PSAs; it provides the conclusion of the research. The writers usually interpret the results and also add comments and views of the researchers of the study or other researchers as well. This move may also contain information about implications and future directions in that field. The last element is the indication of original source article, which also directs

the reader to the actual text by means of hyperlink. However it is not a typical move, it was found to occur in 19 texts. This relatively high frequency may be the result of search methods in the present study. Consequently, it is not possible to conclude that PSAs usually contain a hyperlink that enables the reader to find the original source article that was popularized.

In conclusion, the results show that a typical MRA contains 10 moves in the corpus, and a typical PSA is built up of 8 moves. Most of the rhetorical moves that are present in MRAs are found to occur in the corresponding popularizations. While, the first move of the MRA is concerned with providing background information, the PSA starts with the announcement of recent research findings and provide background information in the next move. The moves depicting data collection methods and procedures are present in both genres but the details are not important in popularization. The moves about discussing main findings and conclusion are found in both corpora and the stability of these moves is fixed.

4   Discussion

As it is widely known, medical research articles follow a distinct rhetorical structure. Text analysis of the constituting MRAs of the corpus revealed that the MRAs are governed by the IMRAD format, and the sections are subdivided into ten rhetorical moves. The order of moves appears to be relatively fixed in the corpus. Similar findings were reported previously by Nwogu (1997) and Fryer (2012). Fryer described ten rhetorical moves based on a corpus of 16 medical research articles. The results of this dissertation are consistent with the ICMJE recommendations for writing up medical research (ICMJE, 2013).

The results also indicate that PSAs have an identifiable pattern and a typical popular article contains eight moves. The writers of PSAs are likely to take over some of the rhetorical moves that are present in MRAs. However, significant structural differences exist between the two text types. The MRA starts with the *background information*, while the PSA typically opens with the *announcement of the main outcome.*

This deductive pattern is possibly used to capture the attention of the reader. The *review of previous research* and *identification of gaps in established knowledge* is a more stable move of MRAs than PSAs. The moves depicting *data collection methods and procedures of experimentations* are present in both genres, but it is more detailed in research papers. The information about *statistical methods* is only provided in MRAs. *Study limitations* are not typically present in popularizations, while it is present in most of the MRAs included in the present study.

The move of *conclusion* is a major element in both corpora and the location of this move within the typical move structure is fixed.

The findings in the present study deviate to some extent from the earlier studies of *Nwogu* (1991) and *Stejskalova* (2012) of science popularization. The most prominent difference is that the initiation move is *the announcement of new research* in 83% of the PSA corpus. Consequently, the articles start with highlighting the research outcome without providing any background information. This deductive pattern is identifiable in the whole discourse structure of texts. The order of moves is not as fixed as it is in MRAs; the corresponding popularizations are also more variable in their thematic pattern. However, there is also a tendency of these elements to occur in a set order. For example, the initial moves are typically Move 2 (*Announcement of Recent Research Findings*) and Move 1 (*Presenting Background Information*). Move 8 (*Stating Research Conclusions*) tends to occur as a final move. Between the initial moves and the conclusion, the moves of presenting new research and describing methods are commonly found.

The findings related to the two sub-corpora indicate that changes take place in the discourse structure when medical research is rewritten for lay audiences. The research article and the popular science article are considered as two different genres with different communicative purposes and different target audiences. The MRA is written for a professional audience and the information is presented in a fixed discourse structure. As Montgomery puts it, the Research Article is 'the master narrative of our time' (Montgomery 1996, in Hyland 2010). The corresponding popular articles are written for non-specialist readers. The way the information is presented is considerably changed in the popularization process. The focus is on the outcome of the research and on the relevance it may have for the readers. Popular texts centre upon the interpretation of the research results and the source of the information referring to the scientists, even by occasionally mentioning their names. Although the means of obtaining the results are not detailed, the most important elements of methods are summarized in the popular articles. This may serve the purpose of making the message more convincing.

Novelty is a key element of both genres but in different approaches. In scientific writing researchers need to share their novel findings with their peers, the authors follow a conventional structure and present facts precisely. Popular articles, on the other hand, report about newsworthy scientific findings or breakthroughs. The arrangement of information within the genre is closer to journalistic discourse, which typically opens up with the main outcome often presented as a sudden discovery.

5   Conclusion

The aim was to provide a detailed rhetorical analysis of MRAs and PSAs. As genres are dynamic in nature, it is necessary to examine the conventions of established genres over and over again. It is even more important to map and describe the specific features of new and emerging genres, such as online scientific reports. The findings

support the contemporary view of science popularization, which assumes that popularization is not about simplifying and distorting scientific information, but rather interpreting the discoveries of science for different audiences. Research comparing academic and popular science discourse is motivated by the needs of those experts or readers, who interpret or produce these genres. Besides the IMRAD structure for research articles, the rhetorical moves identified in the present study can be used as guidelines when producing both popular and scientific articles.

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Bionote

Alexandra Csongor PhD, e-mail: alexandra.csongor@aok.pte.hu, Department of Languages for Specific Purposes University of Pécs Medical School, Hungary
Alexandra Csongor has been working at the Department of Languages for Specific Purposes, at the Medical School, University of Pécs, Hungary since 2002. Her profile is teaching English and Hungarian for medical purposes.

Anikó Hambuch PhD, e-mail: aniko.hambuch@aok.pte.hu, Department of Languages for Specific Purposes University of Pécs Medical School, Hungary
Anikó Hambuch has been working at the Department of Languages for Specific Purposes, at the Medical School, University of Pécs, Hungary since 1992. Her profile is teaching German and Hungarian for medical purposes.

How the Incorrect Use of a Medical Genre and Terminology can result in Erroneous Legal Judgements

Katalin Fogarasi and Philipp Schneider

Abstract: The present study analyses the legal consequences of overlooked generic norms as well as ambiguous Latin, Hungarian and German medical terms in diagnostic reports of soft tissue injuries. The presented authentic German, Austrian and Hungarian diagnostic reports stem from a corpus serving as a basis for a large-scale linguistic analysis conducted in 2012. While the previous study focused on the problem of the limited forensic assessability of soft tissue injuries due to inconsistent clinical injury documentation, the present one goes a step further. To wit: interdisciplinary research highlights the possible legal ramifications on the offenders' punishability in criminal trials.

Key words: medical diagnostic report, soft tissue injuries, forensic expert opinion, interdisciplinary research, criminal law

Abstrakt: Die vorliegende Arbeit untersucht die juristischen Konsequenzen der Vernachlässigung von Regeln einer medizinischen Textsorte sowie falsch verwendeter lateinischer, ungarischer und deutscher Termini in der klinischen Dokumentation von Weichgewebeverletzungen. Die interdisziplinäre Analyse ist die Fortsetzung einer 2012 durchgeführten linguistischen Studie.

Abstrakt: Studie analyzuje právní důsledky přehlížení generických norem a důsledky víceznačnosti latinských, maďarských a německých lékařských termínů v diagnostických zprávách o zranění měkkých tkání. Prezentované autentické německé, rakouské a maďarské diagnostické zprávy jsou výsledkem korpusu, sloužícího jako základ pro rozsáhlou lingvistickou analýzu provedenou v roce 2012. Zatímco předchozí studie byla zaměřena na problém omezené forenzní odhadnutelnosti zranění měkkých tkání kvůli nekonzistentní dokumentaci klinických zranění, tato studie jde o krok dál – mezioborový výzkum zdůrazňuje možné právní následky pro potrestání pachatelů v trestních řízeních.

Introduction: Medical Diagnostic Report of Injuries (MDRI) in Hungary, Austria and Germany

In the case of accidents and assaults, the injured are usually examined and treated by accident surgeons in Hungary, Austria and Germany (in Hungary sometimes by GPs). On any number of occasions the medical diagnostic report provides the basis for the forensic assessment of the degree and type of injuries as well as the weapon involved in the case of a criminal procedure. Therefore, a very detailed clinical description is essential, particularly for the assessment of soft tissue injuries at a later date because said injuries can heal up or change quickly.

The institution of the so-called Forensische Ambulanz (Forensic Outpatient Clinic) facilitates direct examination of the injured by a forensic expert in the bigger cities of Germany and Austria. In cases where injuries need immediate medical care, a forensic expert visits the proband in the hospital as soon as possible. However, by the time the forensic expert gets to the hospital e.g. a wound will have been sutured, concealing important signs and features about the accident or assault. Consequently, even if a Forensic Outpatient Clinic is available, an accurate record using precise terminology is essential (cf. Verhoff, Kettner, Lászik, Ramsthaler, 2012).

Corpus and Genre Analysis of Medical Findings

The language use of the medical discourse has undergone numerous analyses, especially since Swales (Swales, 1990: 24–27) defined discourse communities in academic and research settings. Both written and oral genres of professional discourses have been characterized by Swales and Bhatia to a great extent (Swales, 1990:58; Bhatia, 1993:13). Until now, much research has been conducted especially on professional medical genres, using the method of specific genre analysis considered as 'a multi-disciplinary activity (Bhatia, 2002:3) with the objective of understanding realities of the complexity and the dynamically changing language' (Bhatia, 2002:4). Several corpora have been compiled to examine the language use of health care providers, a 'group not using a special language but a particular language for special purposes' (Rébék-Nagy, 2010:199).

Corpus analysis of the medical discourse originates from the field of medical informatics (Melles, 2004:1352). ESP teachers started to create corpora of medical text in the 1980s to gain deeper insights to the language structure and communicative function of written medical texts and to apply these in ESP teaching (e.g. Adams Smith, 1984; Salager-Mayer et al., 1989; Biber, Finegan, 1994; Williams, 1996; Ylönen,1999; Gledhill, 2000; Cordella, 2004; Schumacher, 2006; Fryer, 2007, 2012; Weinreich, 2010).

In the course of time, the corpora have become more and more specific, the focus of research has been extended by the examination of the oral use of language (especially of the doctor-patient communication). Consequently, nowadays 'the existing corpus-based and genre specific studies of medical research texts have identified a number of key lexical, phraseological, and rhetorical features of this genre' (Melles, 2004:1354).

Within the medical discourse, the genre of the medical finding turned out to be a less widely analysed one (Fogarasi, 2012), which may be due to its terminological complexity. Medical reports usually consist of four 'moves' including the patient's identification, past medical history and the most important issues of the current appointment, i.e. the present complaints and findings, followed by the applied treatment (Gurcharan, 1998:4:43; Cameron, 2002:286). Still, several genre-specific cor-

pora have been compiled and analysed (e.g. Jakob, 2005), some of them from a ter-minological point of view (e.g. Styka, 2013) while others aiming at the improvement of patient safety (e.g. Fujita et al., 2012).

MDRI as an Individual Genre

As for the structure, information content and terminology of medical diagnostic re-ports in general, it can be stated that medical diagnostic reports are usually written for statistical purposes as well as to inform other colleagues about the management of patients (Fogarasi, 2012). However, medical diagnostic reports written on injuries are applied by a very different discourse community, including primary treating doctors, forensic experts and in case of a criminal procedure, even the investigation authorities (Fogarasi, Schneider, 2015). As the discourse community involves many different professionals, it is to be anticipated that the genre is influenced by a high degree of *interdiscursivity* (Fogarasi, 2012), meaning a variety of discursive processes and professional practices, often resulting in mixing, embedding, and bending of generic norms in professional contexts' (Bhatia, 2010:35).

In Hungary, the clinical findings of injuries are to be recorded in an official, numbered form (*látlelet* = 'visual findings') or in a word document following the structure of the form. In Germany and Austria however, conventional clinical findings are used in cases of injuries too. The rules of describing injuries are taught to all medical students within the framework of the clinical subject Forensic Medicine, so that all physicians know the specific terminology, even though there is no special form for describing injuries.

According to the generic norms, MDRIs contain a very detailed description of the visible injuries. They list the injuries according to body parts, and describe their char-acteristics: width, length, depth, colour, direction and in connection with wounds their base, edges, side-walls, margins and surroundings (Sótonyi, 2011:104–105; Brinkmann, Madea, 2004:1273–1274). At the end, as a summary, they record the types of injuries as diagnoses related to the affected body parts. In Hungary, it is a requirement of the genre to record the diagnosis in both Hungarian and Latin, in Austria diagnoses are listed in Latin (Lippert, 2010) and / or German, while in Germany they are written almost exclusively in German (Fogarasi, 2012:135–138).

Considering all the discursive, structural and terminological characteristics men-tioned above, MDRI is to be regarded as a specific genre (Fogarasi-Nuber, Rébék-Nagy, 2012), based on the definition of genre by Swales and Bhatia (Swales, 1990:58; Bha-tia, 1993:13).

Ambiguous MDRIs

In several articles published in Hungary and Germany, forensic experts have brought to accident surgeons' attention that in numerous cases the forensic assessment of injuries is difficult (if not impossible) based on the clinical documentation (cf. Szabó, 2008; Verhoff, Kettner, Lászik, Ramsthaler, 2012). Furthermore, insurance medical experts in Hungary have complained about ambiguous MDRIs, as in case of misleading descriptions of injuries, potentially resulting in denying payment to the insured by insurance companies (Löke, 2006). In Germany, a comprehensive analysis has been performed on the documentation of injuries caused by domestic violence, from a forensic medical point of view (Wagner, 2010). It revealed that the clinical documentation of numerous injuries was insufficient and the use of terms was often not precise enough to facilitate an exact forensic assessment.

Limited Forensic Assessability of MDRIs from a Linguistic Point of View

In 2012, linguistic research showed that about 20% of the MDRIs describing soft tissue injuries were found to be only partly assessable by forensic experts in each of the three countries (Fogarasi, 2012). Three typical mistakes were revealed as underlying linguistic causes of limited forensic assessability: the neglect of generic norms, inconsistent use of terms (deriving from the different classification of soft tissue injuries in the terminology of surgery from that of forensic medicine) and the absence of essential information (Schneider, Fogarasi, Riepert, 2014). These factors all resulted from a high degree of interdiscursivity (Fogarasi, 2012), based on the definition of interdiscursivity by Bhatia (Bhatia, 2010:35).

Legal Consequences in the Continental Law System

What all three countries, Germany, Austria and Hungary, have in common is the Continental Legal System, in which an independent expert appointed by the judge 'supplements' the lack of medical expertise of the judge. As opposed to the Continental Legal System, in the Anglo-American legal system each party provides their own expert witness, whose aim is to convince the jury. Therefore, in both legal systems the forensic expert is 'the evidence' for all medically relevant questions. If the experts cannot make unambiguous statements due to poor documentation, they fail to provide evidence at all. As the judge must come to a decision beyond any reasonable doubts, it can only be hoped that there is still other evidence such as witnesses or visual objects available to examine the case (Fogarasi, Schneider, Bajnóczky, 2014).

Inadequate documentation and in particular erroneous or inconsistent use of terms for injury patterns such as *chop, stab* and *incision* in the studied documentations (Fogarasi, 2012) will regularly present a false picture of the offense in question. As a result, the criminal investigation authorities might regularly be led in the wrong

direction, regarding both the question which crime was committed and which punishment could be an adequate answer to the crime. All three error constellations can influence both the classification of the crime and the selection within the range of punishment. E.g. for a slight bodily harm a judge in Germany might sentence the offender to a fine or to imprisonment up to 5 years. If the judge has a false impression of the crime, he might impose an inappropriate sentence, e.g. if he wrongly assumes a less (or more) serious offense he would orientate the penalty on the lower (or upper) limit of the range of punishment. The difference in punishment can even manifest in several years of imprisonment.

The Goal of the Present Study

The present study aims at continuing the prior research (Fogarasi, 2012) firstly by *comparing terms* used for soft tissue injuries in the native languages as well as in Latin in all three countries and secondly, by pointing out possible *criminal legal consequences* of inconsistent terminology use, based on authentic examples. The authors intend to raise awareness of possible legal consequences occurring due to erroneous use of medical terminology. For this purpose, the present study analyses authentic cases from the point of view of all participants of the discourse community involved in the criminal procedure.

Material and Method

The present study was carried out based on the results of a large-scale corpus analysis of 339 Hungarian, 101 Austrian and 106 German MDRIs and their related forensic expert opinions provided by the University Departments of Forensic Medicine of Pécs and Debrecen (Hungary), Freiburg and Mainz (Germany) and Graz (Austria) as well as by Institutes of Forensic Experts and Forensic Research (ISZKI) located in different regions of Hungary, from the period between 1995 and 2011. For the statistical analysis, SPSS statistical software as well as the method of manual contrastive analysis were used (cf. Fogarasi, 2012). Forensic files were processed in txt file format and examined using the function Key Word in Context (KWIC) of the concordance software WordSmith 5.0.

As in the preliminary research the Austrian sub-corpus only included the citations of MDRIs leaving out Latin terms, in the present study *a further 37 authentic Austrian MDRIs* were examined and made available by the Department of Forensic Medicine of the University of Graz (Austria), from the period between 2013 and 2014. For the analysis of the latter, Microsoft Excel 2013 and contrastive manual analysis were used. Interdisciplinary research allowed for the presentation of the possible consequences for the prosecution of criminal cases stemming from the use of inconsistent terminology in the three countries.

Interdisciplinary Interpretation of the Results

The comparative corpus analysis showed that in Hungarian MDRIs, mostly Hungarian terms were used for describing injuries. Latin terms were only detected in case of haematomas and joint injuries in the diagnostic part of Hungarian MDRIs. Although both Hungarian and Latin terms are required by the genre, in 17% of the diagnoses the Latin term was missing. As opposed to the Hungarian sub-corpus, in the German one only haematomas were recorded in Latin in both the description and the diagnostic part. The rest of the injuries was recorded in German. However, in the Austrian sub-corpus Latin terms were dominating. In 75% of the Austrian MDRIs only a Latin diagnosis was registered without any German description. The Latin term of the diagnosis referred to the type of injury, the body part and the affected side.

Most frequent type of injury leading to epithelial lesion	Sub-corpora and technical literature according to countries	Terms in specialist books on Accident Surgery in the native language	Terms in specialist books on Accident Surgery in Latin	Terms used most frequently in MDRIs in the native language	Terms used most frequently in MDRIs in Latin	Terms used in forensic expert opinions in the native language	Terms used in forensic expert opinions in Latin	Terms used in specialist books on Forensic Medicine in the native language	Terms used in specialist books on Forensic Medicine in Latin
Lacerated wound	Hungarian	zúzott seb	vulnus contusu[m]	repesztett seb/sérülés 63.7% zúzott seb/sérülés 29.2%	vulnus ruptum 13.0% vulnus contusum 76.1%	repesztett sérülés 74.4% zúzott sérülés 18.8%	-	repesztett sérülés 75.0% zúzott, roncsolt, repesztett sérülés 25%	vulnus contusum et lacerum 25%
	German	Platzwunde 75% Riss-Quetschwunde 25%		Platzwunde 66.7% Riss-Quetschwunde 8.3%	-	Risswunde 68,8%	-	Riss-Quetschwunde	-
	Austrian	Riss-quetschwunde	Vulnus lacero-contusum (V.l.c.)	Riss-Quetschwunde 60.9%	Vulnus lacero-contusum (V.l.c.)	Rissquetschwunde 50.0% Riss 45.5%	-	Riss-Quetschwunde	-
Incised wound	Hungarian	metszett és vágott seb	scissum et [c]aesum	metszett seb/sérülés	vulnus scissum	metszett sérülés	-	metszett sérülés	vulnus scissum
	German	Schnittwunde	-	Schnittwunde	Vulnus scissum	Schnittverletzung	-	Schnittverletzung	-
	Austrian	Schnittwunde	Vulnus scissum	Schnittwunde	Vulnus scissum	Schnittverletzung	-	Schnittverletzung	-
Stab wound	Hungarian	szúrt seb	vulnus punctum	szúrt seb/sérülés	vulnus punctum	szúrt (szúrva metszett) sérülés	-	szúrt sérülés	vulnus punctum
	German	Stichwunde	-	Stichwunde	-	Stichverletzung	-	Stichverletzung	-
	Austrian	Stichwunde	vulnus ictum	Stichwunde	Vulnus ictum	Stichverletzung	-	Stichverletzung	-
Chop wound	Hungarian	metszett és vágott seb	scissum et [c]aesum	Vágott seb/sérülés	vulnus caesum	vágott sérülés	-	vágott sérülés	vulnus caesum
	German	Hiebwunde	-	-	-	-	-	Hiebwunde	-
	Austrian	Hiebwunde	-	-	-	-	-	Hiebwunde	-

Fig. 1: *The most frequent terms describing soft tissue injuries used in the Hungarian, Austrian and German sub-corpora in both Latin and the native language, respectively*

Chart on Fig. 1 shows that in all three sub-corpora several synonyms were detected, so the participants of the discourse communities seem to prefer different terms even within one country. Moreover, differences in terminology were found even between the two German-speaking countries, i.e. Germany and Austria.

As for the *Latin* terminology of soft tissue injuries, Chart 1 illustrates that different Latin terms were detected describing *stab wounds* in the Hungarian and Austrian clinical findings. Since in Germany diagnoses are mostly not recorded in Latin, only a comparison of Latin terms used in Hungary and Austria was possible.

In both the Hungarian and the German sub-corpora the greatest variety of terms was found in connection with lacerated wounds. In the Hungarian sub-corpus, most clinicians seem to prefer the term *repesztett sérülés*, the synonym also favoured by forensic experts. However, the most frequently used Latin term (*vulnus contusum*) depicting the same injury is not the word-for-word translation of the Hungarian term. In the German sub-corpus, two synonyms (*Platzwunde* and *Riss-Quetschwunde*) were found referring to lacerated wounds, of which *Platzwunde* was the more frequently applied one. However, in the Austrian sub-corpus, the other term (*Riss-Quetschwunde*) was the most commonly used one describing the same injury. Although in Germany the term *Platzwunde* is the most commonly used one, in the technical literatures of forensic medicine in both Germany and Austria the term *Riss-Quetschwunde* is recommended. Only the latter term implies the underlying mechanism in an appropriate way (cf. Brinkmann, Madea, 2004:364).

In Hungarian MDRIs, diagnoses are to be recorded in both Hungarian and Latin. In spite of this generic norm, 7% of the diagnoses written in Hungarian did not correlate in meaning with the Latin terms in the Hungarian sub-corpus. A complete correlation was found in only 29% of the diagnoses. In the remaining cases either the Hungarian or the Latin term was missing (Fogarasi, 2012:36). The most frequent ambiguity was revealed in connection with the terms *vágás* (chop) and *metszés* (incision): the same injury was diagnosed as a *chop wound* in Hungarian, but as an *incised wound* in Latin or vice versa. The same confusion also appeared between the Hungarian terms depicting chop and incised wounds in descriptions and diagnoses: e.g. a *vágott sérülés (chop wound)* is recorded by a primary treating doctor in the description part in Hungarian, and is referred to in the diagnostic part using the Hungarian term *metszett sérülés* (*incised wound)* (cf. Fogarasi, Schneider, Bajnóczky, 2014). A possible reason for this confusion was revealed by the comparison of terms used in surgery and forensic medicine in Hungary: incised and chop wounds are not differentiated in surgery (cf. Fogarasi, 2010), since they are handled as one category from a therapeutic point of view.

In the German sub-corpus, a similar confusion was found between the German terms *Stichwunde* (*stab wound*) and *Schnittwunde* (*incised wound*) in the description and diagnostic parts of the same MDRIs (Schneider, Fogarasi, Riepert, 2014). However, the criminal legal consequences resulting from such confusions might be of great importance.

Possible Legal Consequences

The following examples represent how the use of inconsistent terminology together with insufficient description of injury characteristics might impair the work of the investigation authorities as well as jurisdiction.

Example 1 (Hungarian sub-corpus, 2009):

```
Description:'A homloki régióban ívelt, 12 cm-es,érinttöleges vágott seb, mely
alapján a koponyacsont látható, ott lépcsöképzödés nem tapasztalható.'
('In the frontal region [there is] an arch-shaped, tangential chop wound, on the
base of which the cranial bone can be seen, no terracing of the bone observable.')

Diagnosis:'Vulnus caesum capitis' ('chop wound of the head') -
'A koponya metszett sebe' ('Incised wound of the head')
```

Since the Hungarian Criminal Code (§ 164) distinguishes between light bodily harm and grievous bodily harm on the basis of whether the injury suffered needs less or more than eight days to heal, it is obvious that judgment biases are inevitable. E.g., in the official assessment tables, slight *incisions* are typically classified as slight bodily harm while *chops*, which are typically caused by a forceful impact, lead to fascia injuries and would usually not heal within eight days. Therefore, chops might be classified as grievous bodily harm. Furthermore, a guided *chop* towards the upper body rather suggests that there is a presumable intent to kill, which makes the criminal investigation authorities start an extensive investigation into a possible homicide case.

If the victim survives, there would obviously be no autopsy. The forensic expert and the prosecution would be dependent on the diagnosis made by the accident surgeons, as the wounds suffered – after the medical treatment – could not be used as evidence anymore. With an inadequate diagnosis it would become extremely difficult to prove whether the offender acted with intent to kill or not.

For the assumption of a killing intent it is sufficient that the offender willingly accepts the possibility of the victim's death (so-called indirect intention or *dolus eventualis*). According to the jurisdiction, the offender must recognize causing the victim's death as possible and not completely improbable and accept the consequences anyway. Therefore, it is not sufficient for the assumption of a killing intent that the offender commits the attack in a particularly dangerous manner, such as by flailing a slash and thrust weapon. However, the court must take into account all possible circumstances, including the question whether the offender could see the actual risk of killing or – *in dubio pro reo* – was still entitled to believe that the victim at least would not die. The principle 'when in doubt, for the accused' dictates that when a criminal statute allows more than one interpretation, the one that favours the defendant should be chosen. Consequently, if *in dubio pro reo* an intent to kill cannot be proven, the offender could only be sentenced for grievous bodily harm, involuntary manslaughter or bodily harm with fatal consequences.
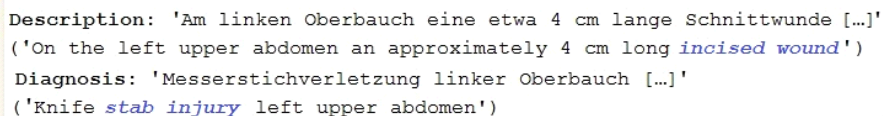
Fortunately, in most of the cases the way a wound was caused would give information about the offender's intention. E.g. *chop* and *stab wounds* in the upper body, especially in the head, neck, chest and abdominal areas, performed with a certain force would always be considered as extremely dangerous, so it is presumed that the offender recognized that the victim might die. This is why the (German) jurisdiction would regularly assume intent to kill and sentence the offender for attempted murder with a penalty of imprisonment from five years to life.

However, an *incision* in the upper body would usually not meet the requirements of killing intent. Therefore, the offender would be sentenced for bodily harm. He would only be sentenced to pay a fine or serve a sentence of up to five years. Furthermore, when it comes to the sentence, the judge would probably consider the criminal energy for causing an *incision* as less than for a *chop* or a *stab* wound and therefore impose a less severe sentence. It is obvious that the wrong use of terms can lead to inappropriate sentences.

In the German sub-corpus, in 22% the terms *Stich* (stab) and *Schnitt* (incision) were used synonymously within the same MDRI, describing the same injury (once in the description, once in the diagnosis). As a (typical) example No. 2 (Freiburg 2009) may well show:

Example 2 (German sub-corpus):

```
Description: 'Am linken Oberbauch eine etwa 4 cm lange Schnittwunde […]'
('On the left upper abdomen an approximately 4 cm long incised wound')
Diagnosis: 'Messerstichverletzung linker Oberbauch […]'
('Knife stab injury left upper abdomen')
```

The reason for the confusion of these two terms in Germany might be that the definitions of incised and stab wounds used in practice are not based on the underlying mechanisms but on the difference of clinical presentation in depth and length (cf. Fogarasi, 2012). Additionally, if a knife is used as a thrust weapon, both general and medical German language prefer to use the word *knife* in combination with *stab* (i.e. knife stab) instead of knife *incision* (cf. Schneider, Fogarasi, Riepert, 2012). Expressions like *Messerschnittverletzung* (*knife incision wound*) or *Messerschnitzerei* (approx. 'knife incising') would sound extremely unfamiliar and therefore appear strange for both the general and medical use of German language.

As for the penalty, causing bodily harm by dangerous means (§ 224 German Criminal Code) might have a strong effect on the punishment. In this case as well, the court would always consider a *stab* to involve higher criminal force and cause more serious damage than a supposedly less harmful *incision / cut*. Secondly, on the basis of

a *stab* in the upper body, the prosecution will focus on a presumable intent to kill and therefore make an accusation of attempted murder (§§ 212, 22, 23 German Criminal Code). If there is (only) an *incision* in the upper body, the court – *in dubio pro reo* – would have to deny intent to kill (cf. Schneider, Fogarasi, Riepert, 2014).

In Austrian MDRIs, insufficient clinical documentation is the main cause of difficulties for the criminal investigation authorities. The Austrian Criminal Code – similarly to the Hungarian one – primarily differentiates between slight and grievous bodily harm (§§ 83, 84 Austrian Criminal Code), based on whether the suffered injury needs less or more than 24 days to heal or can be considered as 'intrinsically severe'. The latter category typically includes life-threatening injuries (e.g. a stab wound in the abdomen, life-threatening openings of body cavities, incisions and stab wounds that could lead to haemorrhaging), compound fractures or even tooth loss if the masticatory function is impaired. The courts have repeatedly pointed out, however, that the combination of several minor injuries, in the overall impression, can be classified as grievous bodily harm in case the victim has suffered for more than 28 days in total, even if only seemingly/ in appearance. Consequently, to facilitate an overall analysis, it is essential that both the forensic medical expert and the trial court can get a realistic impression of the facts.

In example No. 3 (Graz 2011) it is clear that a statement to the impairment of the masticatory function is not possible without a re-examination of the victim.

Example 3 (Austrian sub-corpus):

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Forensic expert opinion: 'Der angebliche Zahnverlust und die Zerrung im
Bereich des rechten Daumens entziehen sich auf Grund der fehlenden
Beschreibung einer näheren Beurteilung. […]'

('Due to the missing description the alleged tooth loss and the strain in
the area of the right thumb can not be diagnostisized.')
```

Conclusion

In conclusion, it was found that the terminology of soft tissue injuries is ambiguous, be it within one country or between German speaking countries.

The use of terms in MDRIs turned out to be inconsistent in the native language in any of the three countries, i.e. several synonyms are used and the clinical and forensic participants of the discourse communities seem to prefer different terms. Furthermore, differences in the terminology of soft tissue injuries were detected between the German-speaking countries as well as between the Latin terms applied in Hungary and Austria. The latter is a highly important result from a terminological point of view because it revealed that not even medical Latin is standardized in Europe.

In addition, a main linguistic conclusion of the interdisciplinary analysis can be summarized as follows: considering the fact that MDRIs are used by the investigation authorities, the preliminary conception of the discourse community of MDRIs (Fogarasi, 2012) has to be reviewed. It has to be expanded to include not only primary treating doctors and forensic experts but also the members of the investigation authorities.

The work of the criminal investigation authorities is affected by inconsistent terminology in two ways: firstly, the investigative results can be distorted due to incorrect clinical documentation as presented in this article. Secondly, different national standards in documentations can cause impairments in cross-border investigations. There has been significant progress in the field of police and judicial co-operation in criminal matters (PJC) in the EU since the Treaty of Maastricht. Therefore, it would be rational to develop uniform standards in the documentation of injuries as well.

In Hungary, standardization of the terminology of MDRIs in the form of computer software is under way, in co-operation with the Department of Forensic Medicine at the University of Pécs.

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Bionote

Katalin Fogarasi, e-mail: katalin.fogarasi@aok.pte.hu, Faculty of Medicine, Department of Languages for Specific Purposes, University of Pécs (Hungary)
Katalin Fogarasi, PhD, teaches medical terminology in the German Programme of the Medical School at the University of Pécs. Her field of research is the analysis of medical terms, especially in accident surgery, forensic medicine and pathology.

Philipp Schneider, e-mail: philipp.schneider@ajk.pte.hu, Faculty of Law, Department of Criminology and Penal System Law, University of Pécs (Hungary)
Philipp Schneider, Assessor Jur., M.A., graduated in law and in organization studies. He works as a guest lecturer for the DAAD (German Academic Exchange Service) at the Law Faculty of Pécs in the Department of Criminology and Penal System Law. His researches focus on the criminalization and decriminalization of organizational behaviour.

Micro-teaching: Concepts of Law: The Concept of *Consideration* in Contract Formation in Common Law Contracts

Paul Cooper

Abstract: This paper shares the experience of using an illustrative approach to teaching the concept of *consideration* in the formation of Common Law contracts. The focus is on teaching and learning rather than attempting to provide a legal treatise.

Consideration is a particularly abstract concept of the *Common Law* legal system and one which is foreign to the thinking of people from a *Civil Law* jurisdiction. In the author's experience, students have traditionally had difficulty absorbing, and more particularly, articulating the concept. Yet, without *consideration* there can be no enforceable contract. Hence understanding the concept is fundamental to all business (and other) contractual transactions.

The paper looks at statements of law from a number of sources and then outlines an illustrative whiteboard approach in the classroom to approaching the concept. Finally the author looks at before and after samples of actual student responses to an assignment task requiring articulation of the concept.

Key words: legal concepts, legal English, doctrine of consideration, contract formation

Abstrakt: *Consideration* je vysoce abstraktní pojem právního systému Common Law, který je pro lidi uvažující v jurisdikci občanského práva cizí. Tento článek se zaměřuje na sdílení zkušeností s používáním ilustrativního přístupu k výuce konceptu *consideration* při tvorbě smluv v rámci Common Law. Důraz je kladen na výuku, cílem není právní pojednání.

Introduction and Context

Law and (implicitly) legal language are an integral part of business courses, banking and insurance, real estate, design and other areas of intellectual property protection; as law regulates society, the list is endless. Teachers of law, and legal English, are not necessarily lawyers. Without disciplined preparation and understanding, teaching legal concepts can be fraught with all the dangers inherent in the misapplication or breach of legal obligations by graduates in their chosen fields; errors in teaching represent bad teaching. Teachers should have an understanding of the unique nature of legal English[1] as well as awareness of how to teach applied law[2].

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[1] See Cooper, P. K. (2010) 'Special languages: Insight into the Language of the Law'. *Lingua Terminologica. Soubor vědeckých statí*. Metropolitní Univerzita Praha. Praha 2010.

[2] For general support in this area see the website of the EU Legal Teachers' Association (EULETA) www.euleta.org. See also Day, J. (2011. 2nd ed.) *International Legal English. Teacher's Book*. Cambridge. Cambridge University Press.

The paper which follows aims to assist teachers of contract law with both the substantive law applying to the Common Law doctrine of *consideration* as well as providing a straightforward approach to teaching an abstract concept. Over a period of some years the author deviated in his teaching of the concept of *consideration* from using a traditional textbook and lecture approach to an illustrative approach. A review of assessment responses to a question on the elements of contract formation (offer+acceptance+consideration = contract) revealed a far greater understanding of the concept when using the illustrative approach described herein, over the earlier formulaic approach. The latter tended to produce more confused responses as well as responses which had been clearly 'lifted' from textbooks or dictionaries; responses from which it was far more difficult to be satisfied that the students showed understanding.

The students the subject of this study were all taking a course called *Aspects of Contract and Negligence for Business*[3] prescribed as a mandatory subject for the UK Higher National Diploma in Business, which acts as a foundation diploma for students progressing to a bachelor's degree in International Business Management (a further one year of study). Students tended to be in the age range of 18–22, they were from a wide range of countries and almost exclusively using English as their second language. It could reasonably be assumed that students had not grown up with, even subliminally, the language of English contract law, let alone the Common Law concepts. Many took the subject in their first semester of studies and whilst some came from a private-enterprise family background most had no business experience and little commercial life experience. In this way concepts of business were still undeveloped and there was something of a fear of studying law. None of the students were law students and many approached the subject with no idea of what law had to do with business. At this level it is probably safe to say that previous learning had focused on facts rather than abstract concepts.

There was no prescribed coursebook for students, leaving resources to the teacher's discretion. The institutional library had no legal texts and one legal dictionary. The author surmises that this situation may be mirrored in other institutions which do not teach law as a degree course, leaving teachers to seek reliable and comprehensible resources at their own expense. Of course there are hundreds of legal textbooks on contract law published for lawyers and law students, but the teacher of legal subjects in business and other non-law courses is probably seeking resources at a less technical level.[4]

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[3] Edexcel BETC Level 4

[4] An example of such resources is the long established *Nutshell* Series published by Thomson. Sweet & Maxwell for UK law. Be careful however as there is also a *Nutshell* series published by West Publishing which deals with US law. See also Footnote 2.

Consideration as an essential element of Common Law contract formation

As one of the essential elements in the formation of a Common Law contract, the concept of *consideration* must certainly be learned and understood by students of contract law. In addition, students of legal English need some understanding of the word *consideration,* as not only is its legal English meaning without parallel in general English, but also it is a frequently-occurring word in contracts throughout the Anglo--American legal jurisdiction, as the following examples illustrate:

> From a US Bill of Sale:
> 'Know all by these presents that in *consideration* of the sum of … paid to the under-signed, …. The undersigned hereby bargains, sells, transfers, and conveys …'[5] (emphasis added)

> From a US Employment Contract:
> 'The Board and the Superintendent have mutually agreed to enter into the following Contract …for and in *consideration* for the mutual promises and *consideration* contained herein …' (emphasis added).[6]

> From a UK tenancy agreement:
> 'In *consideration* of the Landlord letting certain premises to the Tenant, the Tenant letting those premises from the Landlord …' (emphasis added).[7]

If we look at definitions of *consideration* in legal dictionaries[8] we see definitions which either seem too simplistic, or rather abstract definitions (of an abstract concept) which are not readily understood without a deeper understanding.

> An example of the simplistic is:
> *consideration.* The price, in money, goods, or some other reward, paid by one person in exchange for another person promising to do something, which is an essential element in the formation of a contract.[9]

> and of the abstract:

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[5] Stevens-Ness Law Publishing Co., Portland, Oregon. Form No. 237 Bill of Sale (short form) available at www.stevensness.com. Last accessed 12 January 2015.

[6] http://www.kellerisd.net/district/leadership/Documents/SuperintendentContract_July2012.pdf. Last accessed 25 February 2015.

[7] http://www.lawdepot.co.uk/contracts/tenancy-agreement/?loc=GB#.VO3Jmy7lyeI. Last accessed 25 February 2015.

[8] Dictionaries have been exemplified as, without an institutional law library, they are the most accessible legal resource.

[9] Collin, P. H. (2004) *Dictionary of Law*, 4th ed., London. Bloomsbury

consideration n. An act, forbearance, or promise by one party to a contract that consti-tutes the price for which he buys the promise of the other[10]. Consideration is essential to the validity of any contract other than one made by deed.
Without consideration an agreement not made by deed is not binding.[11]
(Note here the contrast with agreements made by deed – more on that later).

That definition is then expanded by stating that the:

'... doctrine of consideration is governed by four major principles:
(1) A valuable consideration is required ...
(2) Consideration need not be adequate but it must be sufficient ...
(3) Consideration must move from the promisee.[12]
(4) Consideration may be executory or executed but must not be past. ...'

None of the above, it is suggested, can be understood or explained without further study.

In fact, in this second definition, the example given by Martin & Law for the principle that *consideration* must move from the promisee could be misleading in the wrong hands.

They exemplify as follows:
Thus if X promises to give Y £ 1000 in return for Y's promise to give employment to Z, Z cannot enforce Y's promise, for he has not supplied the consideration for it.[13]

This seems to exemplify what consideration is *not* rather than what it is. Further, whilst it *could* be interpreted as saying that 'Consideration must move from the promisee', it appears to the author that the concept, as stated, is rather too abstract. This example seems to stand more for principles of *privity of contract* and for con-cepts related to *third party beneficiary* contracts; issues which were certainly central in the case which follows.

The leading case supporting this concept of *consideration* moving from the promisee is *Tweddle v Atkinson*[14] in which Crompton J stated: '...the consideration must move from the party entitled to sue upon the contract'.[15] But does this mean that only one party must provide (need provide) consideration? Or can Compton J's statement be limited to the facts in this case, without ruling out the concept of the provision of mutual consideration? It is submitted that Compton's statement should be limited to its facts.

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[10] Here it is not clear which party is doing the buying.

[11] Martin, E. & Law, J. (eds)(2006) *Oxford Dictionary of Law*.

[12] Essentially here the party responding to the offer.

[13] *ibid*

[14] [1861] EWHC QB J57 Queen's Bench Division

[15] Traditionally this has been interpreted as meaning the *promisee.*

This was a case involving an agreement whereby the father of a bride and the father of a groom agreed to gift a marriage settlement to the groom.[16] The action, for performance, was brought by the groom against the estate of his father-in-law. The action failed, largely on the basis of Compton's statement above. Clearly no consideration moved from the groom, but, it is submitted, that this does not preclude a case where *both* parties to a contract provide consideration, such as in a purchase and sale agreement, or indeed in the three examples above, namely a Bill of Sale, employment contract and tenancy agreement, in each of which there are mutual promises, and in each of which *both* parties would be entitled to sue under the contract. In reality agreements to gift are today generally dealt with by deed, rather than by contract, thereby circumventing the consideration problem.

For reasons expanded upon later, this paper is aligned with Duxbury's comment 'that whilst it (*Tweddle v Atkinson*) stands as good law for the concept that consideration must move from the promisee, it cannot be held as authority to state that the promisor need not provide consideration'.[17]

Day[18] provides us with some psychological relief by stating that: 'This word is one of the lawyer's basic *terms of art*, but even lawyers sometimes misconceive the word...' and that: 'The common-law term *consideration* is the least transparent of the three essential elements'[19]

But this must also act as a warning in our teaching.

What complicates matters further, especially for those teaching business students who are unlikely ever to practise law, and many of whom are reluctantly taking a non-elective subject, is that there are two theories prevailing in connection with the concept of *consideration* in contract formation. These are known as:

(i) The *benefit-detriment* theory; and
(ii) The *bargain* theory.

and they are conceptually different.

The *benefit-detriment* theory is an *either/or* theory in which, for there to be *consideration*, a contract must be *either* to the benefit of the promisor *or* to the detriment of the promisee. However, following the principle stated in *Tweddle v Atkinson* there *must* be detriment to the promisee.

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[16] Until the *Married Women's Property Act* 1870 the assets of a woman (including gifts) devolved upon her husband upon marriage. The husband, in turn, was expected to support his wife.

[17] Duxbury, R. (2003) *Contract Law*. London. Sweet & Maxwell. p20

[18] Day (2006:79)

[19] The other two essential elements of contract formation being *offer* and *acceptance*.

The *bargain* theory (also known as the *mutuality* or *reliance* theory) is based more on *mutuality* and looks at the exchange that takes place between the parties.

Day endorses this latter theory in the following statement and examples:

'Both parties provide consideration for the other party.'
For example:
E.g. 1: Party A may agree to sell a farm (= consideration) in exchange for party B's million dollars (= consideration). E.g. 2: Party C may agree to provide clerical work (=consideration) in exchange for food and shelter from party D (=consideration).[20]

The American online legal dictionary edited by Farlex Inc also supports this principle by stating:

'In a bilateral contract – an agreement by which *both parties exchange mutual promises – each* promise is regarded as sufficient consideration for the other.'[21](emphasis added)

Note the concept of mutual promises reflected in the US employment contract referred to in Footnote 2 hereof. Note also the consideration flowing from the Landlord in the lease referred to in Footnote 3, and, depending on your interpretation of the drafting in that document, also from the Tenant, but certainly from the Landlord.

However, it cannot be seen as an American-only doctrine as Professor Peter Jaffey of Brunel University London, in a 1997 conference paper states: 'Under the doctrine of consideration in English law, for an agreement to be enforceable it must involve an *exchange or bargain* by which *both parties* are to receive a *benefit*'.[22] (again, emphasis added). Note however that Jaffey makes no reference to a *detriment*.

This concept of mutuality is again echoed in the highly-regarded *Osborn's Concise Law Dictionary* which states: '*consideration*. To constitute a simple contract an agreement must amount to a bargain, *each* of the parties paying a price for that which he receives from the other. This price is referred to as consideration'.[23] (again, emphasis added)

I grew up (in the Australian jurisdiction) with the *bargain* theory, and it is that which I teach.

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[20] *ibid*

[21] Ref: http://legal-dictionary.thefreedictionary.com/consideration. Farlex Inc.(Last accessed 20 December 2014)

[22] Ref: Jaffey, P. *A new version of the reliance theory*. Conference Paper. SPTL Conference. Warwick University. September 1997

[23] Ref: Woodley, M. (ed)(2005) *Osborn's Concise Law Dictionary*, 10th ed., London, Sweet & Maxwell

Teaching methodology

Again bearing in mind that my students are young (18–22 year old) business students whose mother tongue is rarely English, after many years of trial and error of understanding, I found it most effective to teach this concept two ways.

1. By using an illustrative approach;
2. By teaching *agreement to gift* at the same time and by way of contrast.

Using boardwork, I start with the following matrix, using a simple contract context such as the sale and purchase of a computer for £ 100:

	Benefit[24]	Detriment
Seller		
Buyer		

The next stage is to pose the following Q & A and mark the boxes

Q.1: What is the benefit to the seller?   A.1: Gaining £ 100

Q.2: What is the loss (detriment) to the seller?   A.2: Loss of the computer

Q.3: What is the benefit to the buyer?   A.3: The Computer

Q.4: What is the loss (detriment) to the buyer?   A.4: Paying £ 100

So we will either tick all boxes or complete them as follows:

	Benefit	(Loss) Detriment
Seller	£ 100	Computer
Buyer	Computer	£ 100

Completing all boxes shows that the agreement is supported by *consideration*.

I then compare this with a Gift as follows:

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[24] Note: the fact that I am teaching the bargain theory is not hampered by the use of the terms *benefit* and *detriment* as I am teaching at a level where it is not necessary for them to know of the competing theories. All that I want them to understand is that *consideration* requires *mutuality* based on an exchange of promises.

	Benefit	(Loss) Detriment
Donor (you)	Nil[25]	£ 100
Donee (Charity)	£ 100	Nil

From what has been established in the first matrix (purchase and sale agreement), it is clear that there is no *consideration* in the gift context.

The students not only universally follow the boardwork and understand the concept, as presented, but are also actively engaged in the learning. Undoubtedly this approach also appeals to the visual leaner.

I then briefly explain that a promise to donate to a charity can be enforceable by documenting the agreement as a *Deed under Seal*. The students seem to understand red seals!

Student responses

Some sample student responses to a requirement to show understanding of the concept of *consideration* in contract formation:

BEFORE using the illustrative approach:

- Consideration = something being given and something being given up
- Consideration is illustrated by the situation with the uncle as he considered the horse to be his when he does not hear from his nephew. Even if the nephew could promise to sell the horse the consideration must move from the promises.
- Consideration is usually a value that is given to the first party when the conditions of the contract are performed. This could be considered such as payments which is exchanged for a product or service.
- The decision of the story was that the court decided that William Guy was the third person and related to any issue in the contract which tell us that the agreement should be created by promisor and promisee.
- Consideration in legal terms means that both parties have exchanged something of value and in this case Miss Carlill (*sic*) exchanged her money for the smoke balls.

The **BEFORE** responses are unclear and inconsistent. It is perhaps notable that some students seek to explain the concept by reference to cases rather than stating the principle of law and then using a relevant case to illustrate the principle.

AFTER using the illustrative approach:

- Consideration means that a contract is valid where each party has given something valuable up, *'suffer a detriment'* and received something in return, *'gain a benefit'*.

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[25] I often have to explain that 'a good feeling' is not a benefit *at law*. And even something such as a tax deduction for the donor, would not compete all boxes.

For example, consideration can be found where one party buys a chair from the other one for £ 10.
Party 1:
Benefit = gaining new chair
Detriment = losing money B £ 10
Party 2:
Benefit = gaining the money B £ 10
Detriment = losing the chair

- Consideration refers to what one party is giving or promising in exchange for what is being given or promised from the other side according to the agreement. Thus each party in the contract must gain a benefit and suffer a detriment for consideration to exist. For instance, if party A sells a computer to party B for £ 100, party A gains a benefit of receiving £ 100 and suffer a detriment of losing the computer at the same time. Party B gains a benefit of receiving the computer and suffers a detriment of losing £ 100. Therefore in this case there exists consideration between party A and party B. However in the example of X giving £ 100 to the Red Cross charity, there is no consideration and thus no contract because X does not gain any benefit from giving £ 100 and Red Cross does not suffer any detriment.
- In contract law *Consideration* is involved with the deal of the contract. It is based on an exchange of promises. Each party of a contract must receive a benefit or suffer a detriment and the benefit or detriment is regarded as *consideration*.

In the **AFTER** responses the students are not only providing more consistent responses, but they are also using clear examples and appear to be more confident and show clearer understanding. Note however that the third student has taken an either/or approach, no doubt from a text or on-line reference rather than board work in class.

The discourse above highlights the dangers faced by those without a legal background in teaching abstract legal concepts. Indeed, as Day noted (see footnote 12) even lawyers are not immune from a lack of clarity of understanding. In teaching legal English there is often a need to explore beyond word level into the principles underpinning a legal concept, and then to consider how an explanation and its presentation will be received by students. This paper has also highlighted a situation of conflicting concepts and how the teacher must take time to study and understand concepts without relying unwaveringly on a given text; jurisdictional issues may also apply, for example in differences between US legal concepts and British and Commonwealth legal concepts. Finally, this paper has attempted to show that by linking teaching with assessment and by adjusting the teaching methodology students have become more closely aligned with what has been taught and are able to more clearly present complex concepts.

Conclusion

In teaching and learning terms, the best conclusion that can be reached is that this illustrative approach works; students show understanding. For the teacher, whether trained in law or not, this analysis shows not only the level of understanding that the teacher must acquire in lesson preparation, but also that decisions may have to be made as to how much is taught and how much withheld. In this process law students should perhaps be fully exposed to the parallel theories surrounding the concept of *consideration*, and then expected to research and prepare case reports on situations where litigation has touched on whether or not *consideration* was present. For business students however a teacher may aim for general understanding in order to leave students with a legacy of awareness to help avoid situations arising for those students in their future careers.

As well as highlighting some of the problems in teaching legal concepts, this case study may give readers cause to think of other areas of their teaching in which an illustrative approach may help override difficulties which may arise in teaching and learning legal concepts.

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Bionote

Paul Cooper, MA, LLB, e-mail: pkcooper8@hotmail.com, lawyer-linguist.
Paul Cooper holds a law degree from the University of Melbourne and a master's degree in legal linguistics from the Riga Graduate School of Law in Latvia. Now retired, he taught legal English in Prague from 2003 to 2015 and was a lecturer in contract and tort law preparing students in Prague for the British Higher National Diploma in Business and in intellectual property law and ethics for the British Higher National Diploma in Graphic Design.

Developing communicative competence in global virtual teams: A multiliteracies approach to telecollaboration for students of business and economics

Rachel Lindner

Abstract: Telecollaboration is a learning scenario in which groups of foreign language learners communicate with geographically distant partner classes via the internet. Besides its principle focus on developing linguistic and intercultural competence, telecollaboration provides opportunities for rehearsing multiple literacy practices. These include media and academic literacy as well as the collaborative and critical thinking skills that are needed for academic and professional contexts alike. Drawing on studies of online intercultural exchange from the fields of Foreign Language Education and Business and Economics, this paper discusses the similarities and differences in approach to online exchange between the two disciplines and then shows how this informed the design of a multiliteracies model for telecollaboration projects that is tailored to the specific needs of students of Business and Economics.

Key words: telecollaboration, global virtual teams, multiliteracies

Abstrakt: Telekolaborace je studijní scénář, ve kterém studenti cizího jazyka komunikují s geograficky vzdálenou partnerskou třídou prostřednictvím Internetu. Vedle primárního cíle, kterým je rozvoj lingvistické a interkulturní kompetence, poskytuje tento způsob výuky také příležitost pro procvičení dalších dovedností, jako např. mediálních a akademických dovedností spolu s dovednostmi spolupracovat a kriticky myslet, které jsou potřebné nejen v akademickém, ale také v profesním prostředí. Příspěvek zkoumá společné prvky i rozdíly mezi výukou cizího jazyka a ekonomickými vědami v přístupu k interkulturním výměnám v obou disciplínách. Následně pak ukazuje, jak je tím ovlivněn návrh modelu souboru dovedností pro telekolaborativní projekt, který je uzpůsoben specifickým potřebám studentů ekonomických oborů.

Introduction

International organizations are increasingly using what is widely referred to in business contexts as global virtual teams (GVTs) as a potentially cost and time-saving method of bringing together geographically and often temporally and functionally dispersed employees for work on a common task or project. The importance of GVTs for international business is reflected in the field of Business and Economics by a growing body of literature that analyses the work processes of such teams in an attempt to define the characteristics that best contribute to their productivity (e.g. Koles and Nagy, 2014; Maynard et al, 2012; Schlenkrich and Upfold, 2009). However, there are only a few examples of pedagogy aimed at preparing students for such work scenarios (e.g. Osland et al, 2012 and Taras et al, 2013) and little consideration of exactly what communicative competence in GVTs entails.

Foreign language teachers, on the other hand, can draw on two decades of research into the affordances of online intercultural exchange projects for developing not only linguistic and intercultural competence, but also a range of interrelated competences, including media literacy, academic literacy and collaborative practices. Besides its intrinsic educational value, multiliteracies development through telecollaboration may also serve to prepare students for the networked, global contexts in which many of them will probably later work. This was the underlying rationale for establishing an online exchange between students of Business and Economics at the Universities of Paderborn (Germany) and Masaryk (Brno, Czech Republic), incorporating insights from both Foreign Language Education (FLE) and Business and Economics in its design.

The following review of studies of telecollaboration in FLE and GVTs in Business and Economics provides the theoretical background against which the rationale and design of a telecollaboration model for Business and Economics students is discussed.

Literature review

Telecollaboration in FLE

Telecollaboration originally became popular about twenty years ago within a communicative approach to FLE because of the opportunities it provides for authentic interaction with native speakers of the target language. Early exchanges were often of a loose 'e-pal' character, akin to 'snail mail' pen friends and emphasizing the learner's intrinsic motivation to seek a tandem partner with whom they could work primarily on their language skills while acquiring some knowledge of the target culture in the process (Brammerts, 2006).

A second phase of telecollaboration can be aligned with calls for an *intercultural* communicative approach to FLE in which language learning objectives are less native speaker focussed and more about becoming an 'intercultural speaker' (Byram, 1997). Studies of telecollaboration in this phase have mostly reported on institutionalized exchanges between student groups in different countries who usually work in pairs or triads on scaffolded tasks with cultural themes in order, above all, to support the development of intercultural competence within a language education context (e.g. Belz, 2004, Furstenberg et al, 2001; Müller-Hartmann, 2007; O'Dowd, 2003; Woodin, 2001).

Despite general agreement about the educational value of such exchanges, much of the literature reports on the challenges that telecollaboration poses educators and students, a detailed overview of which is provided by O'Dowd and Ritter (2006). Challenges include communication breakdown as a result of cultural misunderstandings or 'institutional asymmetries' – i.e. differences between the participating institutions and cohorts. Asymmetries not only take the perhaps more obvious forms of differing

age, cohort size, language proficiency and prior experience of other cultures, but also media literacy – including different practices in using communication tools – as well as mismatched semester dates and grading requirements. Any of these factors might in turn lead to varying levels of participation, commitment, (de)motivation or, in more extreme cases, conflict. Lindner (2015) suggests, however, that asymmetries are not necessarily undesirable in the design of online exchange projects. After all, if the aim of telecollaboration is to promote language and intercultural learning by bringing together students from different cultural and linguistic backgrounds, asymmetry, as an expression of difference, might be understood as an integral component of its pedagogical rationale. Providing students with opportunities to rehearse the skills needed to negotiate cultural difference in academic and professional online contexts might therefore be seen as an important affordance of telecollaboration.

Given its pedagogical and organizational challenges, a blended approach to telecollaboration has been widely recommended, in which in-class discussions, reflective practice and teacher guidance provide input at each stage of the project. Scaffolding of this kind can enable students to better understand the process in which they are participating and to pre-empt, analyse and learn from any communication problems (Müller-Hartmann, 2007; Dooley, 2008). O'Dowd (2003) and Ware and Kramsch (2005) further contend that structuring telecollaboration projects in this way may help students develop intercultural competence regardless of the degree of 'success' of the actual exchange experience.

In keeping with an increasing focus on multiliteracies education in FLE, a third phase of telecollaboration, coined 'Telecollaboration 2.0' (Guth and Helm, 2010), builds on the language and intercultural goals that previously underpinned online exchanges to encompass a wider range of literacies at play in the acquisition of a second language. This includes media literacy, which in the telecollaboration context involves the culturally sensitive development of skills needed for online communication through a range of synchronous and asynchronous media (e.g. Guth and Helm, ibid; Hauck, 2010)[1]. It also involves placing more focus on the collaborative aspect of telecollaboration (Lamy and Goodfellow, 2010) not only through use of 'collaborative' web 2.0 tools, but also by encouraging social skills and taking into account the cultural issues associated with collaborative practices. With regard to the latter, Lindner's 2011 study of telecollaboration, in which Sociology students worked on collaborative team tasks using English as a lingua franca, found that the use of ELF in virtual team contexts may actually reduce awareness of national cultural and linguistic difference, encouraging instead more focus on the successful completion of the collaborative task itself and the unique emerging 'culture' of the team. This finding is

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[1] The Invite Project (http://invite.cjv.muni.cz/results.html), for example, was set up to develop methodology for video-conferencing between groups of students in different countries in both educational and professional contexts.

relevant for the field of Business and Economics and research into the characteristics of global virtual teams, which is discussed in the next section.

Global virtual teams in international business contexts

International companies that require geographically dispersed co-workers to collaborate on tasks are primarily interested in how to achieve positive business results (Lee-Kelley and Sankey, 2007). Consequently, studies of GVTs in the field of Business and Economics have mainly focussed on analysing aspects of team constellations and team processes that have either hindered or contributed to successful outcomes. Like telecollaboration, research into GVTs considers the skills required by participants (i.e. team members), with culture playing a significant role. However, what is striking in Business and Economics discourse is that competence in communicating *across* cultures (cross-cultural competence) is viewed as a means to an end (the end being productivity or, ultimately, profit) whereas in telecollaboration, competence in engendering understanding *between* cultures (intercultural competence) is the humanistic end in itself. Cultural issues arising in GVTs tend to be analysed in terms of quantitatively measured cultural dimensions that compare the characteristics of national cultures (e.g. Hofstede, 1980; Hall, 1984; Trompenaars and Hampden-Turner, 1997). This is perhaps not surprising given that analysis of culture in Business and Economics generally instrumentalizes cultural dimensions. Dekker et al (2008), for example, build their analysis of critical incidents in GVTs on Hofstede's (op. cit.) cultural dimensions (power distance, uncertainty avoidance, individualism versus collectivism, masculinity and long-term orientation) and Gunarwardena et al (2006) draw on both Hofstede's (op. cit.) framework and Hall's (1984) low and high context communication and monochronic versus polychronic cultural dimensions in their discussion of factors that influence online group processes. The suggestion is that an understanding of national cultural dimensions will help GVTs to manage in-team conflict. Cultural issues in telecollaboration, on the other hand, as shown in the last section, are usually discussed in terms of developing intercultural competence, which is an individual learning endeavour that lends itself more to qualitative analysis. Table 1 summarizes the differences.

While some literature on GVTs suggests that task focus may reduce negative power dynamics through less awareness of hierarchical difference, language proficiency and cultural or geographic variation (e.g. Koles and Nagy, 2014), other research shows how team tensions derive from precisely these differences. Nurmi et al (2009) note that team hierarchies may be formed by the most linguistically proficient members 'shouting loudest' (i.e. dominating) in online team interaction while less linguistically proficient members withdraw from team dialogue. This shows that simply being good at the language is not in itself a prerequisite for success since less communicative team members may possess other valuable knowledge and skills. In the same study Nurmi et al further argue that uneven power distribution may also

Tab. 1: *Key differences between GVTs and telecollaboration*

Working in GVTs (business context)	Telecollaboration (FLE context)
Exchange across cultures is the means to the end.	Exchange between cultures is the end in itself.
Goal orientation: Participants achieve successful project outcomes in GVTs that are measured in terms of productivity and profit.	Process orientation: Participants learn through experiential online exchange and reflection on the experience.
Cross-cultural communication is informed by cultural dimensions (e.g. Hofstede, 1980; Hall, 1984).	Intercultural communication is facilitated by the 'intercultural speaker' (Byram, 1997).
Cross-cultural difference is *managed.*	Intercultural understanding is *guided.*
Positive project outcomes depend on building a cohesive team culture that transcends national borders and national cultures.	Positive learning outcomes may be achieved even if the project itself (involving communication between participants) is less 'successful'.

engender the dominance of one national group within a GVT. Dominance may stem from asymmetries, such as the size of co-located groups within a team, proximity to the main source of information or control of the technology. Cramton (2001) found that in virtual student groups, co-located sub-groups formed within the team, with the dominant sub-group perceiving the contribution of other sub-group members to be inadequate. Counterbalancing this problem, Misiolek and Heckman (2005) observe that team leaders may naturally emerge within a team to co-ordinate asymmetries, assuming either *task* leadership (i.e. the organization and execution of tasks) or *group maintenance* leadership, which focuses on interpersonal aspects of building trust and team cohesion.

While the literature on GVTs in business contexts is prolific, examples of business school projects akin to telecollaboration in FLE are rare. The GVT simulations conducted by Osland et al (2004) and Taras et al (2013) are exceptions, with both studies testifying to the merits of experiential learning about GVTs in business education. There is a clear rationale here for telecollaboration projects in ESAP courses which can contribute insights from FLE to the field of Business and Economics. This was the starting point for the Paderborn–Brno Global Virtual Teams Project.

The Paderborn–Brno Global Virtual Teams Project

Project context

The exchange between students at the University of Paderborn in Germany and Masaryk University in Brno in the Czech Republic took place over eight weeks within the wider framework of semester-long ESAP courses for Business and Economics students at each of the participating universities. Table 2 shows key information about the course participants and their home institutional contexts. The asymmetries between the two groups are immediately apparent and needed to be taken into consideration when forming teams.

Tab. 2: *Asymmetries between the two participating universities*

University of Paderborn	University of Masaryk
All students studying towards the same master's degree. Most also studied together on the same bachelor degree.	Students studying towards various Business and Economics bachelor degrees.
All students knew one another outside the classroom and most had collaborated with each other on other projects.	Little or no familiarity with one another outside the classroom in most cases.
The English course (and GVT project) was mandatory; the grade counted towards the master's degree.	The English course was voluntary.
27 participants, only two of whom had a non-German background (Portuguese and Afghan).	16 students, three of whom were Erasmus students from France, Belgium and Russia and two students from Slovakia.
All Paderborn students were either 22 or older than the average participant age of 22.	Several of the students were younger than the average participant age of 22.
English proficiency was a strong C1–C2.	English proficiency was C1 (B2 in some cases).
Relatively advanced academic skills – all students had written a bachelor dissertation.	Less academic experience.
Semester started in mid-October; the GVT Project took place early in semester.	Semester started in September; the GVT Project took place towards the end of semester.
Considerable cultural experience, for example through study sojourns. A number of students spoke French and one spoke Russian, but there were no participants with experience of the Czech Republic.	Considerable cultural experience, for example through study sojourns. A couple of students were familiar with Germany and the German language.
Familiar with online communication, though less so in academic projects.	Familiar with online communication. A couple of participants specialized in Business with IT.

Team constellations

Asymmetries can be framed positively as diversity, the management of which is an important topic in business management. This was acknowledged in the project design by organizing students into teams of mixed culture, age, language proficiency, gender, academic experience etc. The German students dominated in terms of numbers, an asymmetry that is not uncommon in GVTs in business contexts and which could also be replicated in the team constellations. In total there were eight teams, five teams of five (each with three Paderborn and two Masaryk students) and three teams of six (each with four Paderborn and two Masaryk students). As too much dominance may lead to either in-team conflict or a sense of being overwhelmed on the part of the minority team members, students had to be sensitized to the implications of the team constellations for team processes and team outcomes early in the course input. Teams were not assigned leaders or other roles; however, we discussed their significance for team performance in class so that students could decide whether to

assign themselves roles or, even more experientially, could observe whether roles emerged as the project progressed.

Blended learning framework

By conducting the project within the wider framework of an ESAP course, classroom sessions at both institutions could be dedicated to theoretical input (for example on intercultural and cross-cultural communication), for project guidance and for on-going reflection on the learning experience. Class sessions were also used for practising professional writing skills for the project task, academic writing skills for the post-project reflective paper and presentation skills for the project video conferences.

Project phases

Telecollaboration is usually divided into task-based learning phases. Dooley (2008, 51) emphasizes its collaborative e-learning aspect by describing project phases in terms of Salmon's (2000) five-stage model of online collaboration. In the first stage students make contact and explore the tools of communication. They then move on to online socialization, which is critical for positive group dynamics. In the third stage, teams organize themselves for collaboration. In stage four students create knowledge (e.g. in a team project). In the final stage, participants reflect on the outcomes of the task itself as well as the process of online collaboration and finally adjourn the collaboration.

Although Salmon's model was not specifically devised for collaboration between people from different cultures, it is in keeping with a multiliteracies approach to telecollaboration. It also reflects Furst et al's (2004) study of the life-cycle of GVTs in which the authors map GVT project phases on to Tuckman and Jensen's (1977) five--stage model of team formation in face-to-face teams: forming-storming-norming--performing-adjourning (see Table 3). This model highlights the potential for conflict in online collaboration, which is not specifically acknowledged in Salmon's (op. cit.) model.

The Paderborn–Brno project included elements from both telecollaboration and GVT models. In keeping with most real-life GVTs, the project life-span was purposefully short and task-focussed, with tight deadlines that allowed relatively little time for socialization and trust-building in comparison to telecollaboration projects. This made the project particularly challenging for students and reflective practice all the more important.

Phase 1 took place over two weeks in a Wikispaces wiki (www.wikispaces.com), which served as the central online space for the project. Each team had its own page in the wiki, where they made initial contact and considered key aspects of collaboration

Tab. 3: *Stages of virtual project team development (adapted from Furst et al., 2004)*

Phases	Forming	Storming	Norming	Performing	Adjourning
F-2-F team formation behaviour	● Getting to know each other ● Building initial trust ● Clarifying goals and expectations	● Similarities and differences revealed ● Identification of responsibilities and roles – conflicts may arise	● Team members identify ways of collaborating ● Bonds are strengthened	● Work towards project goals ● Mutual support	● Project conclusion ● Feedback ● Team disbands with some sense of loss
GVT team formation challenges	● Fewer opportunities for off-task trust-building ● Trust is slower to develop ● Gaps in information about team members may lead to stereotyping	● Reliance on less rich communication channels may worsen conflict ● Reliance on an emerging or assigned team leader	● Difficulty in developing norms for communication modes, speed and frequency ● Commitment to using software is unclear	● Vulnerability to pressures from local (competing) assignments ● Frustrations over free-riding or non--commitment ● Discontinuation of communication in some cases	● Project conclusion ● Feedback ● Team disbands with some sense of relief

guided by discussion prompts that had been set up in the wiki by the teachers. At this point in the exchange, teams could decide to use other communication channels and online tools for working on their team task. Besides its organizational and team--building functions, the visibility of this initial phase was important for the teachers to be able to see that the teams were all up and running. By the end of this phase, most teams had moved into their chosen communication channels, where more team socialization and organization took place as they prepared for the first video conference.

Phase 2 took place in weeks 3–8, starting and concluding with plenary video conferences which not only acted as a second plenary space for group interaction (in addition to the group wiki), but also provided students with opportunities for professional presentation skills development when the teams formally presented ideas for and the results of their projects.

Between conferences, students worked on team projects. From class discussions and post-project reflections it emerged that the more 'successful' teams dealt with the storming and norming aspects of Tuckman and Jensen's (1977) model in Phase 1 or early in Phase 2 (though not necessarily sequentially), so that they could dedicate

GVT project
English as medium of exchange

Phase 1	Phase 2a	Phase 2b	Phase 2c	Phase 3
Establishing contact with partners Considering key issues	Video conference Presenting project proposals	Working in autonomous teams ⊙ Researching ⊙ Preparing reports ⊙ Preparing presentations	Video conference Presenting project results	Post-project data analysis and writing a paper based on the experience
Weeks 1-2 Exchange wiki	**Week 3** Conference suite	**Weeks 3-7** E-tools of choice	**Week 8** Conference suite	

IN-CLASS ACTIVITIES BEFORE, DURING AND POST EXCHANGE: THEORETICAL INPUT, DISCUSSION, REFLECTION, CONSOLIDATION

Fig. 1: *Project phases*

most of Phase 2 to performing. In other teams, storming and norming seem to have taken place almost parallel to performing, making teamwork frustrating and project outcomes unsatisfactory for the students involved. Reflection on this process was therefore essential for positive learning outcomes.

Phase 3 started after the second video conference and involved 'adjourning' the project – i.e. debriefing, feedback and reflection. Throughout the project, students had kept a log of all online dialogue and any critical incidents that might have occurred. After completing the exchange, they analysed this data as the basis of a reflective academic paper in which they compared the exchange experience with the business literature on GVTs, focusing on those aspects that seemed particularly relevant to them. In the opinion of this author, post-project reflective work is an essential part of the project design, as much of what takes place during the project becomes clearer in retrospect. In the Paderborn group, topics that were most frequently chosen as the focus of the reflective paper included:

- English language proficiency in online ELF contexts

- The impact of e-leadership on team communication
- The emergence of team culture in GVTs as opposed to national culture
- Trust building and mismatched communication expectations
- The impact of asynchronous and synchronous communication tools on collaboration
- Interpersonal relationships and collaborative practice
- Technological and linguistic barriers to effective communication

The choice and discussion of these topics signalled that students recognized that being communicatively competent in GVTs requires a wider set of communication skills than simple language proficiency. They also considered in their papers what skills they felt they personally still needed to work on and, in line with the Business and Economics focus, made GVT training recommendations for international business.

Project task design

In keeping with descriptions of other telecollaboration studies, the Paderborn–Brno GVTs task had a cultural theme that was inspired by the task design reported in Osland et al (2004, 120) for their GVT simulation. Teams were asked to prepare a report or create a website comparing a product, service or managerial innovation across at least two different cultures. For example, one group created a webpage in which they explored marketing approaches and consumer attitudes to Škoda cars in Germany and the Czech Republic. In addition to the report, teams had to briefly present their project proposal in a class video conference at the beginning of Phase 2 and present the results in a longer team presentation at the end of Phase 2. Task instructions were kept to only the most essential information in order to necessitate negotiation not only of the topic, but also of how to complete the task, thus encouraging interaction within the team.

Besides submitting the report to the wiki, teams also had to upload a 500-word reflection on what went well and what went less well in their GVT. This was framed as advice to a company in which teams should give recommendations for GVT best practice in terms of organisational, interpersonal and communication processes. The team reflection was used to inform the individual post-project reflective papers.

Use of language

Since English is generally considered to be the lingua franca of business, it was used as the common language for this exchange. Paderborn students generally had higher English language proficiency than the Masaryk students; however, online lingua franca contexts require communication strategies that are different from those usually used in the ESAP classroom. For example, one team thought it would be convenient to use a single platform for all communication, but discovered that some chan-

nels were more suitable for transactional communication while others lent them-
selves to interpersonal communication. Moreover, although video conferencing is
a commonly used tool in GVTs and was therefore planned into the course design for
project presentations, most teams avoided it in their project work because they felt
the organization would be too complicated. In retrospect, they came to the conclu-
sion that the synchronous face-to-face nature of conferencing might have played an
important role in building trust and team cohesion, thereby mitigating misunder-
standings within the team.

Concluding comments

Telecollaboration projects for Business and Economics are an experiential approach
to ESAP that provides students with valuable situated practice for a workplace sce-
nario that they will very likely encounter in the future. The design of this project
benefited both conceptually and methodologically from incorporating insights from
research into GVTs from the field of Business and Economics. Conversely, since there
are few examples of business school pedagogy in this area, the faculty can likewise
benefit from FLE's extensive experience in online exchange as well as the different
pedagogical perspective.

There is a strong rationale for introducing projects to the curriculum that have the
potential for a wide range of skills development. However, telecollaboration projects
are not to be entered into lightly as they involve considerable dedication and some-
times equally considerable frustration on the part of instructors and students alike.
Teachers must consider in particular what aspects of the course design need to be
prescriptive for the exchange to work (e.g. team constellations, task objectives, task
products and deadlines) and how much can be guided experiential learning (e.g.
team roles, choice of technology, when and how to interact, expected project out-
comes etc.), the balance of which will impact on the overall learning effect. Similarly,
teachers can aim to find partner institutions with which there are likely to be fewer
institutional asymmetries, but should bear in mind that this may detract from the
experience of negotiating difference. Rather than smoothing the edges in this way, in
future versions of the Paderborn–Brno exchange, we intend to add more diversity to
the teams – and more potential for asymmetries – by introducing a further institution.
We also plan to develop the video-conferencing aspect of the course, the skills for
which are highly relevant for business students, but which at the same time proved
daunting for participants both in terms of formal plenary presentations as well as
in conducting in-team interactions using teleconferencing tools. Finally, research is
required in future years to analyse more precisely the impact of the project design
on student learning outcomes in a Business and Economics ESAP context.

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Bionote

Rachel Lindner, M.A. e-mail: rlindner@mail.uni-paderborn.de, Languages for International Business Studies, University of Paderborn, Germany
Rachel Lindner teaches English and coordinates the language division of the International Business Studies programme at the University of Paderborn. The main focus of her work is in ESAP. Her special interests are in multiliteracies practice in ESAP, intercultural learning and in teaching language with educational technology.

Video conferencing in Teaching Cross-cultural Competences

Markéta Denksteinová and Stellan Sundh

Abstract: International communication in business requires adequate skills in English. For this purpose, the global community requires a working force who can not only use the English language for reception of information but also for oral and written production. It is thus vital for educational institutions to prepare students efficiently and possibly more than ever, for fast and reliable oral communication with the help of Skype or video conferences. At the same time the curricula of higher education are filled with what the students need in many other respects to be able to succeed in their future career. Studies of language can therefore be challenged by other courses and activities, all necessary to have at hand in a more complex and demanding working environment. Motivation is central in students' learning and therefore it is crucial to create conditions for learning languages that students experience as both relevant and authentic-like.

In 2014 some 120 students at Pardubice University and Uppsala University, Campus Gotland worked together in communication in English by using video conferences. In these video conferencing seminars the students' oral skills were in focus. The Czech and Swedish students were of different faculties/disciplines but mostly in the first or second year of their studies. The purpose was to highlight issues of international business and intercultural communication and in this way develop the students' language competence in authentic communication and interaction between non-native speakers of English. The authors will discuss some e-struments (Moodle, Facebook groups, shared Google docs and presentations, Google drive) used in VC seminars for improving effective language learning and for achieving desired progress in the students' communicative and cros-cultural competences. The instruments discussed are related to raising the students' learner autonomy through video conferencing techniques in the everyday learning-teaching process. The experience of the students also reflects the intercultural challenges seen through the students' different approaches towards both set and selected topics for VC sessions and focuses on the shift from the teacher-centred to a more learner-centred approach. The seminars were evaluated both in terms of questionnaires and with discussions in groups.

Key words: oral communication, English, non-native production, university students, video conferences

Abstrakt: Mezinárodní obchodní komunikace vyžaduje adekvátní dovednosti komunikace v anglickém jazyce. Za tímto účelem vyžaduje globální společnost pracovní sílu, která je nejen schopna používat angličtinu pro přijímání informací, ale také k vlastnímu ústnímu a psanému projevu. Je tedy životní nutností vzdělávacích institucí připravit studenty efektivně a možná více než jindy, na rychlou a spolehlivou komunikaci prostřednictvím Skypu či videokonferencí. Na druhou stranu kurikula vyšších vzdělávacích institucí jsou naplněna dalšími požadavky na studenta pro úspěšné začlenění do pracovního prostředí. Motivace jak pak klíčová pro samotné učení studentů a proto je nezbytné vytvářet takové podmínky pro studium jazyků, které by

navozovaly dojem autentičnosti a byly relevantní studijnímu zaměření v co nejvyšší možné míře.

V roce 2014 pracovalo zhruba 120 studentů Univerzity Uppsala a Univerzity Pardubice na společném projektu prostřednictvím videokonferencí. Videokonferenční semináře se zaměřily především na ústní projev studentů. Jednalo se o švédské a české studenty prvních Google drive), které studenti používali během videokonferenčních seminářů. Diskutované nástroje jsou spojeny se snahou o zvýšení studentovy studijní autonomie v každodenním procesu učení. Tato zkušenost studentům umožnila porovnat interkulturní rozdílnost v přístupu k řešení daných otázek a problémů a pomohla též posunout ohnisko výukového procesu více ke studentovi. Semináře byly hodnoceny závěrečným dotazníkem a diskuzemi v jednotlivých skupinách.

1 Introduction

When Tim Berners-Lee first set out to create the World Wide Web in the late 1980s and early 1990s, he had no real intention of changing the way that the world interacts with information and individuals. His goal was simply to give the multinational scientists that he was working with at CERN, a physics laboratory in Geneva, Switzerland, an opportunity to easily communicate regardless of the types of operating systems and computers that they were using in their home countries. It was not long, however, before he realized that these inventions had the potential to break down the kinds of barriers like geographic borders, time and place, and cultural misunderstandings that have always kept the world separated. As he imagined in a 2005 interview: 'I'd like to see the World Wide Web building links between families in different countries… to allow us to browse people's websites in different languages so you can see how they live in different countries.' (Berners-Lee, 2005). Technology thus gives preconditions for an awareness of, respect for and reconciliation of cultural differences (Trompenaars and Hampden Turner, 1997).

For many tech savvy teachers, using digital tools to give students opportunities to learn with, rather than simply about, the world is slowly becoming a reality. They are pairing students with digital partners or recognized experts in different countries to learn together. While there are a range of products and services available that can make this kind of cross-border learning possible, video conferencing applications are one of the most popular because they usually require just a webcam and internet connection to create a real-time interact between connected classrooms. These opportunities are highly motivating for students of any age.

The work being done with video conferencing in education is as diverse as the teachers who have embraced synchronous learning opportunities as a way to break down the walls of their schools. Thus students of the University of Pardubice in Czech Republic and Uppsala University in Sweden, had the opportunity to explore the world in a one-month-long experimental teaching-learning process using video conferencing technology during their autumn term 2014. The aim of these video conferencing modules was not only to explore the world and cultural identities of

the other nation, but also to cross the limits and borders of the language competence of each individual participating in these modules to get the message across. As Geert Hofstede claims in his book *Exploring Cultures*: "Some say we are living in a global village... but our global village has many disparate quarters." (Hofstede, 2002). In addition to exploring the world and other cultures, the video conference seminars could make the students aware of their own cultural identity in a global perspective. This self-awareness becomes the result of insights into intercultural communication starting as a journey into the foreign culture, in this case Czech or Swedish culture, and ending as a journey into their own culture (Adler 1975; Martin and Nakayama, 2008:16).

2   Participants of the VC modules

Studies of language can be challenged by other courses and activities, all necessary to have at hand in a more complex and demanding working environment. Motivation is central in students' learning and therefore it is crucial to create conditions for learning languages that students experience as both relevant and authentic-like. Virtual international teams in business are becoming more and more common to overcome for instance geographic distances, and this new way of working in international contexts put new demands on the participants (Browaeys and Price 2011: 331). It goes without saying that authentic communication in the most frequently used language for international communication with the help of modern technology is relevant and motivating for students, not only at universities with students who have an international career in mind, but for students in many disciplines and at all levels.

During autumn term 2014 some 120 students at Pardubice University and Uppsala University, Campus Gotland worked together in communication in English by using video conferences. In these video conferencing seminars the students' oral skills were in focus. Written preparations were carried out in teams, both national and mixed, when scripts, power-point presentations or other visual materials were worked out in advance. Czech students were all first or second year Bachelor programme students of three different fields: Business and Administration, Electrical Engineering and Informatics. Swedish students were all first year students of the Bachelor programme of Business Administration at Uppsala University, Campus Gotland.

Even though the study fields were not compatible, it did not cause any obstacle in the videoconferencing module itself. As described above, the main focus was on the student's ability to communicate and be aware of certain cross-cultural issues being part of those modules. Figure 1 and 2, based on the feedback questionnaire responses of 75 out of 120 participating students, show that respondents were balanced not

only by nationalities, but also by gender. Both had a relevant and significant impact on the way communication was processed.

Swedish	**38**	49.3%
Czech	**37**	50.7%
Other	**0**	0.0%
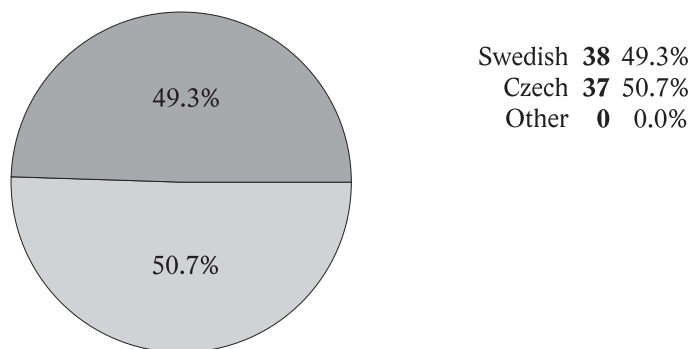
Fig. 1: *National proportion of students answering the questionnaire*

Male	**37**	49.3%
Female	**38**	50.7%
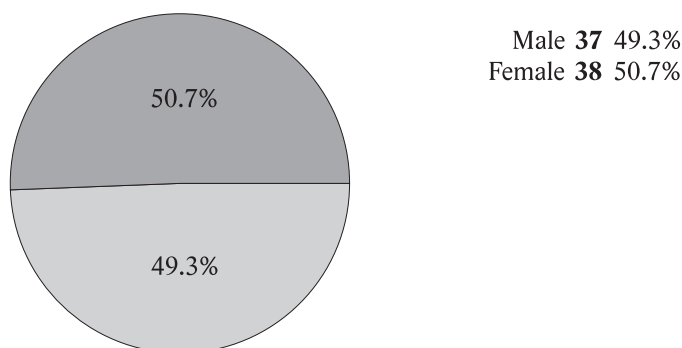
Fig. 2: *Gender proportion of students answering the questionnaire*

The questionnaire does not reflect the proportion of males to females on each side, but even though on the Czech side there were mostly males, the Swedes balanced the proportion of students' gender among the students participating in the video conferences. This aspect would be definitely further monitored and elaborated in the next video conferencing sessions during autumn term 2015, because it plays a significant role in the face to face communication. The Hofstede dimensions were questioned among many others and these dimensions in the Czech and Swedish perspectives can be seen in Figure 3 below:

The figures above show that the masculinity/femininity index is very low in Sweden whereas it is quite high in the Czech Republic, which is to be interpreted that the described masculine values are dominant in the Czech Republic whereas the described feminine values are more frequent in Sweden.

Fig. 3: *Hofstede cultural dimensions comparison*

One of the tasks the students were asked to fulfil within the third VC session was to identify the differences when comparing two critical incidents. These critical incidents were taken from study material (Baltic Sea Regional Cross-Cultural Material De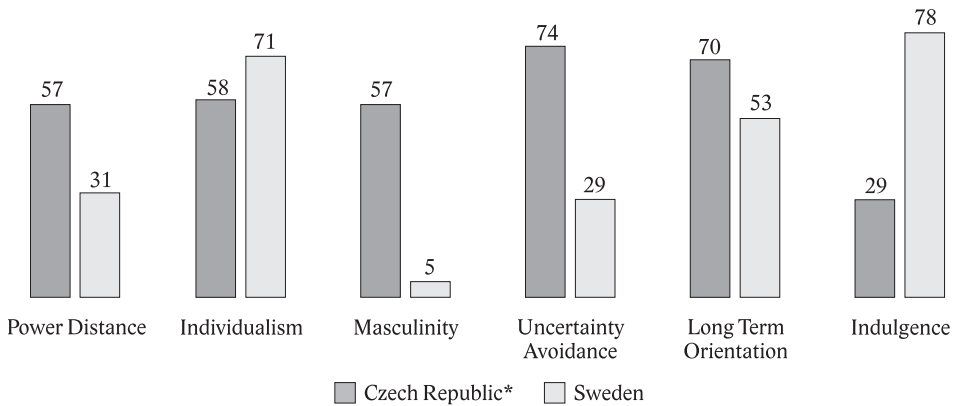velopment Project 2010) which was worked out in accordance with ideas of intercultural interactions (Cushner and Brislin, 1986). The first critical incident *Help the Lady* dealt with the idea of being polite as a student in a university context and dealing with such tasks as helping a female lecturer. The discussions immediately led to students sharing expectations and experiences of gentleman behaviour. The outcomes were very surprising for both sides and practically copied the cultural differences of the Hofstede's scale. Where the mostly male Czech group were ready to show their masculinity, the Swedes were rather talking about equality and power of making their own decisions even when asking for help. In this way the students became aware of the issue of gender equality and women's employment, which can be a visible trait of a cultural difference between Swedish and Czech values (cf. for instance, the employment rate of women as a percent of the population aged 15–64 in the year 2000: Sweden: 71 %; the Czech Republic 56.8 % Guirdham 2005: 15). This critical incident also carried the themes of power distance as the woman being helped appeared to be a teacher carrying her stuff. Hence the power distance appeared to be almost the same on both sides. Even the students' experiences of the teachers were not similar. As Hofstede says: "As only a small part of gender role differentiation is biologically determined, the stability of gender role patterns is almost entirely a matter of socialization. Socialization means that both girls and boys learn their place in society, and once they have learnt it, the majority of them want it that way." (Hofstede, 2002: 298)

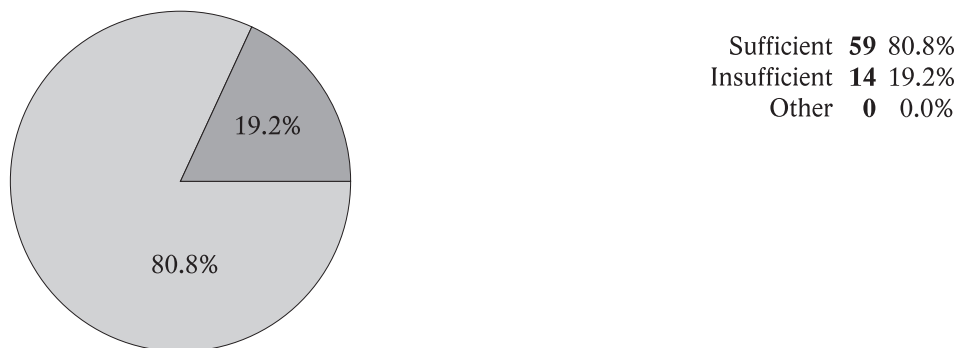| Hofstede Traits of Masculinity/Femininity http://foxhugh.com/multicultural/hofsete-index/hofstede-masculinity-femininity-exercise/		
	High Masculine	**Low Masculine (Feminine)**
1) Family and School	1) Traditional family structure 2) Girls cry, boys don't, boys fight, girls don't 3) Failing is a disaster	1) Flexible family structure 2) Both boys and girls cry, neither fight 3) Failing is a minor accident
2) Politics and Economics	1) Economic growth high priority 2) Conflict solved through force	1) Environment protection high priority 2) Conflict solved through negotiation
3) Religion	1) Most important in life 2) Only men can be priests	1) Less important in life 2) Both men and women as priests
4) Social Norms	1) Ego oriented 2) Money and things are important 3) Live in order to work	1) Relationship oriented 2) Quality of life and people are important 3) Work in order to live
5) Work	1) Larger gender wage gap 2) Fewer women in management 3) Preference for higher pay	1) Smaller gender wage gap 2) More women in management 3) Preference for fewer working hours

Fig. 4: *Hofstede Masculinity/Femininity*

3 Cross-cultural competences on their way

La Ray Barna has elaborated on the distinction between observation and interpretation in cross-cultural communication. He claims that there are four areas of practice that constitute potential barriers. First he identifies the barrier in language difference. (Barna, 1992) Language is much more than learning new vocabulary and grammar. It includes cultural competence: knowing what to say and how, when, where, and why to say it. Secondly, Barna identifies the area of nonverbal communication such as gestures, posture and other ways we show what we feel and think without speaking. Our culture has taught us to communicate through unspoken messages that are so automatic that we rarely even think about them. Thirdly, stereotypes are a major barrier of communicating across cultures. We try to fit people into patterns based on our previous experience. We see what we want to or expect to see and we see the characteristics on the basis of there being similarities on one single dimension (Scollon and Wong Scollon, 2001). These barriers of stereotypes could be both of a negative kind, when two cultures are contrasted on the basis of a single dimension, or of a positive kind when the mistake in terms of a solidarity fallacy leads to the conclusion that there is commonality across many cultural similarities. A fourth barrier is our tendency to evaluate behaviour from the other culture as good or bad and, to make judgement based on our cultural bias.

The last fifth barrier is the high level of stress that typically accompanies intercultural interactions. As Hofstede puts it, there are certain strategies you can apply to overcome these barriers. Ways to decrease the language barrier are: a) learn the language, b) find someone who can speak the language as an interpreter and c) ask for

clarification if you are not sure what someone says (Hofstede, 2002). As English has been used as a lingua franca for the purpose of video conferencing communication, we found that the most important aspect in the communication was to ensure that the speakers on both sides were at about the same level of English according to the CEFR scales. Even though both original ESP courses were on B2 CEFR level, some of the Swedish students appeared to be on a higher level when using and applying English as a main means of communication. This observation is in line with the findings on the rating of NNS accents of English as a Lingua Franca when Swedish and German accents are rated quite high in comparison with other accents (Jenkins, 2007: 163) (The Czech accent is not investigated in this study). Despite the national accents and difficulties with meaning of some stereotypical notions of language, the students were able to express themselves and to get the message across, as was also shown in the feedback questionnaire responses based on the VC modules (see Figure 5.).

My English language competence was _____ for the VC communication:

Sufficient	**59**	80.8%
Insufficient	**14**	19.2%
Other	**0**	0.0%

In the end I found myself during the VC sessions:

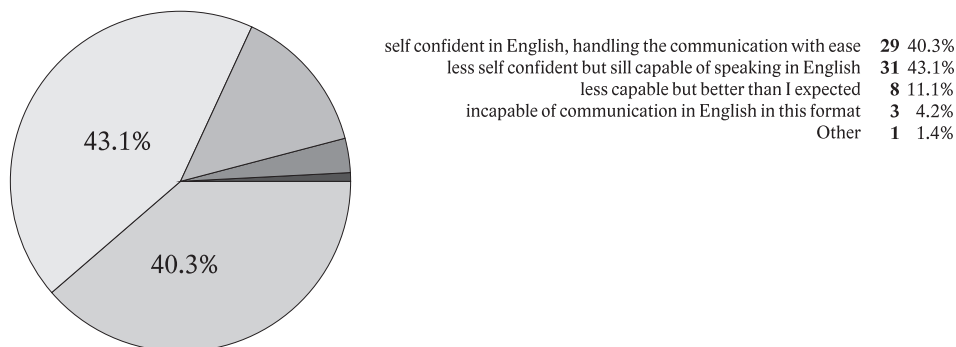|		
self confident in English, handling the communication with ease	**29**	40.3%
less self confident but sill capable of speaking in English	**31**	43.1%
less capable but better than I expected	**8**	11.1%
incapable of communication in English in this format	**3**	4.2%
Other	**1**	1.4%

Fig. 5: *English competence*

Looking at ways to cross the nonverbal communication barrier is not within the scope of our study, so we leave these out and concentrate on the steps overcoming the third barrier. According to Hofstede we should a) make every effort to increase awareness of our own preconceptions and cultural stereotypes that we encounter, b) learn about the other culture, and c) reinterpret their behaviour from their cultural perspective, adapting our own stereotypes to fit our own new experiences (Hofstede, 2002). Evaluation has been called the third stage of how we attribute meaning. Ways to decrease the tendency to evaluate are maintaining appropriate distance, recognizing that you cannot change a culture (or yourself) overnight and not judging someone from another culture until you have first come to know them and their cultural values.

The students were given space for their own cross-cultural investigation within two video conferencing sessions. The students' answers in the feedback questionnaire gave evidence of what had been obvious: namely that the students' awareness of other cultural values increased. Following the concept of the ten strategies for cross--cultural communication (see Figure 6.), the students were shown a totally new perspective.

Fig. 6: *Figure 6. Ten Strategies for Effective Cross-Cultural Communication*

As can be seen in Figure 7 above, the students appreciated the critical incidents and the cross-cultural issues more than the presentations and comparisons of university
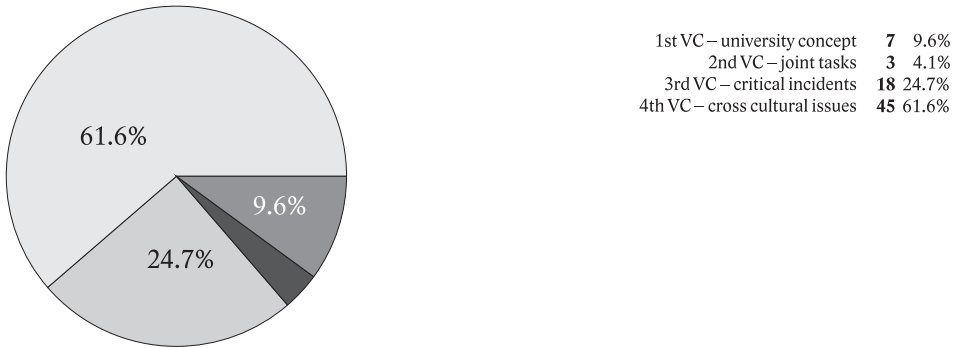
Which VC session did you like the best?

1st VC – university concept	**7**	9.6%
2nd VC – joint tasks	**3**	4.1%
3rd VC – critical incidents	**18**	24.7%
4th VC – cross cultural issues	**45**	61.6%

Fig. 7: *The students' evaluations of the four videoconferencing sessions*

life, business and working life in the two countries. The third and fourth video conferences made it possible to find out cultural differences and discuss them without any student mobility. Since this was the purpose of the video-conferences, it is worth looking more in detail at these actual identified results.

The results of the video conference seminars were both linguistic, with practice of oral proficiency and authentic communication in English, and cultural, with insights and increased awareness of cultural similarities and differences in Europe. The students learnt that some values were shared and recognized in the discussions. One of these issues was, for instance, views on religious matters and habits; no obvious religious activities were described or showed contrast in comparisons between the two countries. Another issue which did not lead to identified differences was the view on and experiences of politicians and political parties in the two countries.

Evidently it is interesting to identify issues that led to learning experiences for the students. The first issue was discussed due to the fact that one of the critical incidents was about the views on friendship and helping a friend in need of help at a formal examination. In this discussion the students clearly identified differences in attitude when the Czech students regarded it as possible and realistic to help a friend by cheating at an exam, whereas the Swedish students saw it as less plausible to act in such a way. In the follow-up discussions of the video-conference seminars, the Swedish students expressed the view that this was a great learning experience. Possible explanations for this cultural difference could be that Swedish schools work to a great extent with learners' own responsibility in their studies, even at an early age, and that the Czech experience of a totalitarian regime could be an explanation for the students' views on and respect for authorities at exams in the school system.

The second issue where differences were identified was immigration, particularly from Romania and Bulgaria (Romani people). From a Scandinavian perspective, immigration was a highly controversial and current topic in 2014 and Swedish students were thus well acquainted with ideas of tolerance, solidarity and multicultural issues from debates in the media. The Czech students showed a slightly different attitude, perhaps due to the geographical location of the country and its neighbours.

The third issue was gender equality, which in various ways and on several occasions turned up as an issue which could be further discussed and national conditions were compared. This is not surprising since the gender issue is and has been widely discussed in Scandinavian countries for many years and these discussions have had an impact on values and beliefs (cf. the Hofstede variable masculinity and femininity above).

Eventually, the fourth issue was the costs of living across European countries. It was inevitable that the students' comparisons of university life, working conditions and everyday life included financial dimensions at a very concrete level. Their awareness that costs of living, prices, social benefits, salaries and taxation are to be regarded and analysed together and in their cultural context is significant in order to prevent simplified pictures of the other culture and stereotypical ideas.

4   Discussion of results

The experiences from the video conference seminars clearly show that communication and interaction in an authentic and international context were beneficial for the students' motivation and understanding of virtual cooperation in working life. As seen in the results of the questionnaire, these video conferences with authentic communication using English as a lingua franca were new experiences for most of the Swedish and Czech students. What needs to be taken into account in this kind of cooperation is the fact that quite a number of business students are focused on an international career and see the grades in the courses as crucial for reaching interesting positions in international commerce and trade. Since their performances were graded, particularly in the Swedish context, it was important for the Swedish students that they were given the opportunity to 'show off' in their oral proficiency, perhaps in another traditional seminar; particularly if they were high achievers and were aiming for a top grade in this English course. Nevertheless, this way of co-operating internationally with video conferences provides opportunities for including more partners form a range of different contexts and in this way thus strengthens the intercultural results of the communication.

Additionally, modern technology makes it possible to develop interaction and communication, for instance at an individual level with Skype conversations, and consequently this makes it possible to prepare the video conference seminars very efficiently. This pair-wise communication in Skype or other ways is then not controlled

or supervised by the lecturers but provides contexts for real interaction in an informal setting in the phase of preparing for a presentation, which is probably a very common activity in the students' future career in international business. A detail which should be highlighted is the fact that video conference seminars demand great organizational skills from all parties involved, since the outline requires many small groups on both sides and the challenge of anticipating students' absences and drop--outs of the course.

5 Conclusion

The results of the video conferences in this project between a Swedish and a Czech university show that cross-cultural competence can be reached without mobility and thanks to ICT. Language competence is of course a key factor and an adequate level of proficiency in, for instance, English, is necessary and the starting point for developing this awareness of cultural differences and similarities. The findings also suggest that the matching of language proficiency between partners is a factor to consider in the preparations. An additional factor is finding effective ways of organizing the students' preparations of their activities in the video conference seminars, possibly individually and for instance with Skype meetings. A further step in this kind of co-operation would be to include more partners, preferably from culturally diverse regions, and to develop ways to make the students aware of the multicultural characteristics of European societies and the fact that students are very similar in various ways: we share many values and assumptions.

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Bionote

Mgr. Markéta Denksteinová, e-mail: marketa.denksteinova@upce.cz, Language Centre, University of Pardubice.
Marketa Denksteinova is the ESP lecturer at the Language Centre of the University of Pardubice, Czech Republic. Her field of expertise lies in sociolinguistics and multimedia usage in ESP teaching.

Stellan Sundh, e-mail: stellan.sundh@engelska.uu.se, Uppsala University, Campus Gotland
Stellan Sundh is a senior lecturer at Uppsala University. His interest in research lies in the use of English as a lingua franca and its implications for the teaching and learning of English.

Quality management and assessment

Authenticity in ESAP Course Design: Managing Departmental & Student Expectations

Sophia Butt

Abstract: Designing English for Specific Academic Purposes (ESAP) programmes which could help practitioners to deliver an authentic experience to students preparing for degree courses is undeniably challenging. However, with careful planning, close cooperation with academics and feedback from students both before and after they embark on their departmental studies, it is a challenge that can be successfully met.

The Business Management English (BME) Programme at the University of Birmingham is one of the UK's leading discipline–specific ESAP courses for postgraduate students. This article illustrates the three-pronged approach to course design which was taken to develop an authentic presessional English course for business students.

The key to the approach lies in attempting to design a curriculum which mirrors departmental studies in terms of the pedagogical methods employed, the materials and assessment techniques used, and the seminar tasks set. It is also about understanding and managing both departmental and student expectations to create a rewarding learning experience. **Note**: the approach herein can be used to design an ESAP course for any discipline.

Key words: course design, ESAP, presessional, authenticity, expectations

Abstrakt: Vytváření programů angličtiny pro specifické akademické účely (ESAP), které by pomohly učitelům jednotlivých oborů předávat studentům připravujícím se na diplomové studium autentické zkušenosti, je bezpochyby náročné. Avšak s pomocí pečlivého plánování, úzké spolupráce s akademickými pracovníky a zpětné vazby od studentů jak před, tak i po zahájení jejich katedrového studia, je úkol, který může být úspěšně splněn.

Program Business Management English (BME) na Univerzitě v Birminghamu je jedním z britských předních oborově specifických kurzů ESAP pro postgraduální studenty. Tento článek ilustruje třístranný přístup k obsahu kurzu, který byl použit k vytvoření autentického kurzu angličtiny pro studenty před zahájením podnikatelského studia.

Klíčem k tomuto přístupu je pokus vytvořit osnovy, které odrážejí katedrové studium, pokud jde o použité pedagogické metody, materiály a techniky hodnocení a zadávané seminární práce. Pro uspokojivou studijní zkušenost je také důležité pochopení a řízení očekávání jak katedry, tak studentů. **Poznámka**: tento přístup může být použit k vytvoření kurzu ESAP pro jakýkoli obor.

EAP across the Disciplines

In the mid-1970s, the British Council commissioned a number of studies to investigate English for Academic Purposes (EAP) across disciplines; that is, the aim was to take a closer look at English for *Specific* Purposes (ESP). In the early 1980s at the University of Birmingham (UK), Tony Dudley-Evans and Tim Johns produced a series

of papers, some of which were co-authored, examining the importance of collaboration and team-teaching in creating materials for overseas students of EAP/ESP. Two decades later, Swales and Feak (2001) continued to reinforce the need for collaborative synergies that would benefit the stakeholders in ESP.

In their book entitled, *ESP: A Multidisciplinary Approach*, Dudley-Evans and St John (1998) highlight the importance of using authentic *carrier content* to teach *real content* when looking at specificity in ESP; for example: the statistics in an annual report could constitute carrier content in a lesson, while the real content might be to teach students the language of trends and comparisons.

The motivational aspect of creating course materials which meet the needs and expectations of international students has been explored by many authors (see, for example, Robinson, 1980; Kennedy & Bolitho, 1984; Jordan 1984, 1993 & 1996; Dörnyei & Ottó, 1998; Ushioda, 1998; Dörnyei, 2001). Commonly, studies have revealed that where students feel the course they have opted to study meets their needs and expectations, they are more likely to be motivated to achieve success (Crookes & Schmidt, 1991).

The Challenges of Creating Authentic E(S)AP Course Design

There are a number of obstacles that can hinder authentic course design in respect of a preparatory English or presessional[1] course for future degree students. Often, there is limited access to academics in the receiving departments who would be willing to give up their time to share thoughts and/or course materials, or indeed authenticate the validity of subject-specific content created in the English course. This is, in part, attributable to the somewhat low status that English courses generally have in many Higher Education institutions today as they tend to be perceived merely as offering remedial English to non-native speakers of the language, rather than crucially equipping them with the academic skills and language needed to enhance their chances of success when studying a degree in a second or third language.

Jordan (2002:74) highlights that there are several forms of co-operation between ESAP course developers and subject specialists that could prove valuable where the latter are willing to cooperate, for instance, '...the provision of text specimens and reading lists, recording short talks for...language practice, giving guest lectures, and even co-operating in the writing of practice material.' However, such collaborations usually only occur after effective communication and considerable efforts to network have resulted in securing the trust and respect of individuals in receiving departments: the departure of one or more of these personnel with a collegial attitude means having to start afresh in attempting to build meaningful relationships which may then lead to new, useful partnerships.

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[1] an intensive English course which runs immediately prior to departmental studies

Irrespective of any fruitful dialogues that may have taken place with receiving departments and/or students, and the creative ideas which may also have been generated within the materials-writing teams, the time and number of staff required to design a high quality course which mirrors the needs of its learners often restricts what can be feasibly produced in the time available or accorded. Another difficulty is identifying both departmental and student expectations of what the presessional course will deliver, as often, neither of these stakeholders have a broader understanding of external constraints (for example, governmental stipulations) which may impinge on course design.

As Hamp-Lyons (2000) states, before designing a course, it is essential that the EAP course convenor or practitioner establishes the needs of the students. But one of the greatest challenges in striving for authentic EAP course design where presessional programmes are concerned, is that it is virtually impossible for a multi-disciplinary presessional to cater to the needs of all (or even most) of its students: consider trying to meet the subject-specific needs and expectations of engineering, law, education, computing, business, medicine – and other students, all studying English together, before they proceed to different departments upon successful completion of the presessional. On the other hand, a discipline-specific presessional offers significantly more opportunities to build an entire ESAP course around the future discipline of its students. Nevertheless, this also has its challenges.

The BME: A Discipline-Specific Presessional

The Business Management English (BME) Programme is a discipline-specific presessional course which was founded at the University of Birmingham (UoB) in 2001. Initially, it accepted undergraduates (UG) and postgraduates (PG) with conditional and unconditional offers to study at any UK-based university. However, as the popularity of the programme grew and numbers increased (11 students and 2 staff in 2001, to 300 students and 45 personnel in 2014), this presessional was limited to students with offers to study at the Birmingham Business School (BBS) only. Additionally, as it became clear that the needs of the UG learner differed significantly from that of the PG student, a separate English course was created for these two levels of students.

The BME Programme is offered in four course lengths: 20-, 15-, 10- and 6-weeks, depending on the level of English of the incoming student, as evidenced by their score in a government-approved Secure English Language Test (SELT). Naturally, the higher their English score, the shorter the course students can be accepted onto (see UoB website for entry scores and SELTs accepted).

What follows, is the three-pronged approach to course design that was implemented on the BME during the period November 2008 to November 2014. This was done

with the support of the then Management Team[2] who, amongst other areas, were responsible for curriculum and materials design.

1 Collaboration with Subject Specialists

Understanding the needs and expectations of the key stakeholders is a crucial step when striving to create an authentic course. Thus, it is prudent to consult receiving departments early in the course design process. Course convenors may well discover that Programme Leads (i.e.: the subject specialists) know very little, if anything, about the aims and objectives of the E(S)AP course which has been/is being designed specifically to act as a preparatory programme for students holding conditional offers. This was the case with the BME in relation to the BBS. A starting point, therefore, may be to deliver a short presentation to personnel in the receiving department to share the [proposed] overview of the ESAP curriculum and assessments, and the academic/linguistic skills taught to students prior to their departmental studies. It is worth stating here that approaching the Leads without specific ideas or a provisional plan may be counter-productive as the subject specialists are likely to feel pressured to contribute a considerable amount at the initial course-writing stage, thus resulting in them being unwilling to enter into collaborations.

It can be reasonably assumed that even a 15–20-minute presentation designed to encourage maximum possible attendance will not be attended by all subject specialists, and so soon after, one-to-one meetings should be arranged with Programme Leads who are responsible for the most popular post-ESAP courses. In the case of the BME, these were: the Masters in Business Administration (MBA) programmes, and MSc courses in Marketing, International Business, Accounting & Finance, Investments, and Human Resource Management (HRM). These meetings, which were a crucial step in networking and fostering mutually-beneficial long-term professional relationships and on-going dialogue, not only enabled the communication of information about the BME, but also helped to establish the expectations of BBS staff. Additionally, the Leads were asked for any information that they would be willing to share to help inform BME course design, for instance: reading lists, examples of assessment questions and sample case study tasks.

It is entirely possible that in addition to being unable to attend a presentation, some subject specialists will also be unavailable for – or even uninterested in – a one-to-one meeting. In such cases, the Faculty could be asked to give up 10 minutes to complete a questionnaire aimed to elicit information which would help inform course design. Such a questionnaire was issued to BBS staff. This covered a range of areas including: the writing genres with which students are expected to demonstrate familiarity when on their degree course; the tools/models/theories widely referred to during their

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[2] Senior Coordinators, Jennifer Metcalfe & Mike Loughlin; the iVLE/IT & Team Coordinator, Hasan Shikoh; and the BME Director (myself)

departmental studies; common academic weaknesses displayed by students during their degree programme; and requests/suggestions about items which could be woven into ESAP course design. For all-round convenience, including the data-mining which follows data collection, this questionnaire should be rendered into e-form (in the case of the BME, this was using Google Docs, which conveniently collates responses into a spreadsheet).

Following the presentation, one-to-one meetings and the issuing of a questionnaire, Planning Meetings should then ensue before work can begin on any necessary revisions to the course design. Once the assessments have been modified and reviewed, it would be beneficial to arrange brief follow-up meetings with subject-specific teams in the receiving departments where the specialists can be asked to comment on the authenticity of the content of the proposed curriculum and its assessment tasks. Where necessary, further revisions can then be made. The next step is to gain first--hand experience of term-time interactions between the subject specialists and former presessional students, together with their direct entrant counterparts, during their degree studies.

2   Observations of In-Sessional Classes

Step one of the three-pronged approach referred to above can lead to the formation of strong professional relationships with Programme Leads in post-ESAP course departments. As such, in step two, they are likely to become more receptive towards requests to observe a series of their lessons: ideally, the observations should be conducted in term one of the degree programme (particularly if this is a one-year Master's course), as this is when most students undertake intensive study on core modules.

In this second step, the aim is to ascertain the following: the types of tasks set in class and their pace and level of difficulty; the background reading/knowledge expected of PG/UG students; the nature, quantity and frequency of homework assigned and any feedback given on the same in subsequent lessons; the complexity of the assignments set for formal assessment; the nature of interaction between staff and students, and among students in class; and, the level of independence and autonomy expected of the learners. This step will enable the creation of *more* authentic course content which would resemble Presessional/ESAP students' future departmental studies.

Perhaps unsurprisingly, most observations are likely to reveal that there is not a standard blueprint for each of the above-listed areas. In fact, in some cases, they may vary considerably from one degree programme to another. Also, the personal style of individual lecturers will affect what happens in the lessons. However, as a general rule, it could be fair to assume that staff who are responsible for courses in which students are required to have a higher level of English at the point of entry high appear to have higher expectations of their students: on the BME, these courses were

the MBA programmes, the MSc in HRM and two of the four MSc degrees in Marketing, namely Strategic Marketing & Consulting, and Marketing Communications. The quantity and length of assessed essays for these degrees was noticeably higher than those in the Accounting & Finance group. However, those studying the latter were expected to demonstrate greater expertise in statistics and written genres pertaining to this area, for instance: reports; feasibility studies and financial analyses. It quickly became clear that that these were areas that required attention on the BME.

The importance given to linguistic accuracy and knowledge of the relevant referencing system may be emphasized more in non-finance subjects which have lengthier assignments, although all students are required to reference their work appropriately. In the case of the BME, students in each of the observed modules were expected to engage in regular seminar discussions and deliver presentations on the same. The average length of assignments in the Accounting & Finance group was 2,000 words, compared with 4,000 words (with the longest essay being 5,000 words) for the MBA, HRM and two aforementioned Marketing courses. This reinforced existing course design on the BME where students were expected to produce oral presentations and fully referenced assignments – the longest being 3,000 words.

Based on the assumption that the classes observed during in-sessional term time are representative of the general standard and expectations of staff across the degree programmes, the course designer is likely to be in a advantageous position to assess whether or not the curriculum is largely aligned with the future needs of their students and the expectations of the receiving staff. Where necessary, adjustments can be made to achieve a greater degree of authenticity.

3   The Arrival Questionnaire, Student Reunion & Talking Heads

The final step in the three-pronged approach to authentic course design is to communicate with the main stakeholders – the students. This is when an arrival questionnaire designed to elicit what students are expecting to learn on their English course can be administered to them, and modifications can be made for future students enrolling onto the course.

On the BME, this was done using an e-questionnaire, in a computer cluster, on the second or third day of the course, that is, before the students could be influenced by fellow classmates and/or other stimuli. This questionnaire asked the learners to identify their provenance; whether they came from families where others had studied overseas; who, if anyone, had influenced them to study abroad; what they were expecting of the host community; what expectations they had of cultural and academic integration; and most importantly, what they were expecting their ESAP course to cover. Over a three year period, a total of 816 students responded to this questionnaire (Rees, Butt & Shikoh, 2012).

What was established through responses to the arrival questionnaire on the BME was that the overwhelming majority of students had opted to study on the presessional course because this was one of two options presented to them by their Admissions Officer when they were made a conditional offer to study for a PG degree. Their other option was to retake a SELT and secure the necessary result for direct entrance. Very few students had any real expectations in terms of presessional course design, though many had expected to gain entrance to their degree course once they had finished – as opposed to successfully completed – the presessional. A large proportion of BME students revealed that they anticipated being taught or exposed to subject-specific vocabulary, for instance, lexis related to marketing, or investments, or international business.

Students who have undertaken a preparatory ESAP course and have subsequently embarked on departmental studies are a rich source of information which could be very useful for the ratification of authenticity (or otherwise) in course design. With this in mind, an annual pre-Christmas Reunion was held for presessional students who had passed the BME and completed the first term of their Master's degree course: the invitation, which was emailed to students, included a link to a questionnaire with three simple questions designed to aid incremental changes on the BME Programme. These questions were:

1. Which skills acquired on the BME Presessional have you already had to use/demonstrate in the first term of your degree programme?
2. Which tasks have you been set in term 1 at the Business School that you feel the BME did not [fully] prepare you for?
3. Do you have any suggestions on how we can improve the BME course for future students?

The response rate for these questionnaires on the BME was approximately 35% each year, which equated to between 90 and 120 students. This number of responses provided the Management Team with enough insight into what was successful about the BME from the perspective of the students in terms of authenticity and meeting expectations, and where there was room for improvement. What was most encouraging was that students often responded to question 1 with a long list of answers (where many of the items were repeated by different students), while there were few answers other than *'All ok!'* or *'Nothing – thank you!'* for questions 2 and 3.

Where students did reply to questions 2 and 3 in the first and second year of the reunion, however, a pattern emerged – and this is what was valuable for course design/modification purposes: in response to question 2, some students felt under--prepared when having to produce a financial report, and when asked to create a professional CV. The suggestions made in response to question 3 centred largely around requests for classes on British Culture. As a result of this feedback, a Finance

Coordinator was recruited on the BME to develop the finance-related materials and tasks, and to provide both staff and students with optional workshops on this area of business. Where CV writing and lessons on culture were concerned, both were offered to students as Optional Classes.

Finally, another way to manage the expectations of future students and to give them access to authentic feedback is to ask former students to provide tips to new or prospective students on what to expect on the ESAP course and how to succeed. Thus, fourteen former BME students who had attended different course lengths (20-, 15-, 10- & 6-weeks), and were from a range of cultural backgrounds, studying a number of different sub-disciplines within business were invited to attend a meeting if they were interested in being part of a project where they could provide information on the BME to future students.

During the meeting, the students were asked to choose an area related to the BME which they felt they could talk on for up to one minute. The importance of honesty was stressed, and they were given less than 24 hours to prepare. The first time I heard what the students had to say was in the recording studio. The result was a 10-minute *Talking Heads* video, which was later uploaded to the BME website (accessible here: http://www.birmingham.ac.uk/International/eisu/presessional/ bme.aspx). This video provides valuable information on the discipline-specific nature of the BME Presessional to potential students, their parents, agents and others who are interested in learning about the course. Since the information comes directly from former students, wherein along with praise for the programme, several students also comment on the intensity and challenges of the course, there is a certain amount of credibility that can be associated with the *Talking Heads*.

Concluding Comments

To conclude, many authors have suggested that EAP materials should reflect disciplinary variation and discourse specificity (see, for example, Hyland & Hamp-Lyons, 2002). Basturkmen (2010) argues that the three key considerations in developing any ESP course involve analysing needs, investigating specialist discourse and determining the curriculum. While it would be very difficult for a multi-disciplinary presessional to cater to the English needs of all its students, the creation of an authentic ESAP course which meets the expectations of its key stakeholders *is* possible where discipline-specific English courses are concerned. An important part of this goal is to ensure that information on the course is available and easily accessible to those who need it. Distributing literature to and organising specially convened talks and/or meetings with the relevant university teams is a worthwhile, indeed crucial, activity in this respect.

It is also important to ensure that supporting systems and documentation are in place: for instance, website content; brochures; Director's Reports; and additional

information for direct applicants (i.e.: the students) and overseas recruiting agents. These will guarantee that stakeholders have access to documentation which reveals not only the course content, but also the pre-requisites of the programme, thereby reducing any misconceptions or mismatches in expectations.

Fostering good relationships with Programme Leads in students' future department(s) through regular communication – preferably face-to-face – is essential. This tends to take time to nurture, but once mutual trust has been established, it heightens the prospect of collaborative work and fruitful synergies: where there is evidence of this (e.g.: team-teaching between presessional practitioners and subject-specialists (see Adams-Smith, 1980); and/or Guest Lectures delivered by the latter), it instils confidence in both presessional staff and students about the authenticity of the ESAP programme, as the involvement of departmental lecturers in the presessional acts as a form of endorsement.

Finally, those responsible for course design can learn a considerable amount and make worthy incremental changes to the curriculum and course content by obtaining feedback from their main stakeholders and acting on any feasible suggestions made. In the case of ESAP programmes, this feedback could take the form of materials (e.g.: assessments) being shared with subject specialists and inviting their comments on the same. It may also involve meeting the Admissions and Marketing Teams to glean the nature of the enquiries put to them by prospective students in order to ascertain where there may be a lack of clarity in the course literature/website. Asking students to share their expectations through an arrival questionnaire can help the Course Director to address any misconceptions early in the presessional. And, one of the final steps which could lead to the production of an authentic ESAP course, is where presessional alumni are asked to re-evaluate the programme and how well, or otherwise, it had prepared them for their main studies.

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Bionote

Sophia Butt, e-mail: s.butt@birmingham.ac.uk, University of Birmingham.
Sophia is an International HE Consultant. She works as a Staff Mentor, Examiner & Tutor in English Language & Applied Linguistics at the University of Birmingham (UK), where she was Director of the BME Presessional Programme (2008–2014).

Removing the barriers to research engagement – teacher motivation for research-based teaching development in language centres

Tuula Lehtonen, Johanna Vaattovaara and Johanna Manner-Kivipuro

Abstract: This article draws on several workshops we have held on teacher research engagement. These recent workshops have indicated that many language centre teachers in Finland identify the same barriers that prevent them from doing research. In the same vein, these teachers tend to agree on the factors that drive them to do research. Based on our workshop at the *Language Centres in Higher Education: Sharing Innovations, Research, Methodology and Best Practices* conference, European language centre teachers share similar thoughts about research engagement: they like the idea of doing research and they often do some research, but sometimes find the barriers in their professional lives too great. Using research findings as well as data collected in the Brno workshop, we aim to discuss 1) the motives of teachers to carry out or follow research in fields related to teaching and learning and 2) ways and methods that encourage or facilitate teacher research. To help us reach these aims, we present the story of Johanna, to exemplify a teacher's experiences in becoming research engaged while taking part in in-house pedagogical training that fostered research orientation.

Key words: teacher research, research engagement, professional development, university pedagogy

Abstrakt: Tento článek čerpá z několika workshopů zabývajících se zapojení učitelů do výzkumu. Ukázalo se, že mnoho učitelů jazykových center ve Finsku uvádí shodné překážky, které jim brání provádět výzkum. Ve stejném duchu se tito učitelé převážně shodují na faktorech, které je ve výzkumu podporují. Jak vyplynulo z našeho workshopu na konferenci Language Centres in Higher Education: Sharing Innovations, Research, Methodology and Best Practices (Jazyková centra ve vyšším vzdělávání: sdílení inovací, výzkum, metodologie a nejlepší praxe), učitelé evropských jazykových center vyjadřují podobné názory na zapojení do výzkumu: myšlenka provádění výzkumu se jim líbí a často nějaký výzkum dělají, ale někdy shledávají překážky ve svém profesionálním životě příliš veliké. S použitím poznatků a údajů shromážděných ve workshopu v Brně zamýšlíme diskutovat o 1) motivech učitelů provádět či sledovat výzkum v oborech vztahujících se k výuce a studiu a 2) způsobech a metodách, které podporují či usnadňují učitelský výzkum. Jako pomůcku pro dosažení těchto cílů uvádíme příběh Johanny, který ilustruje zkušenosti učitele se zapojením se do výzkumu při současném pedagogickém vzdělávání na pracovišti, které napomohlo orientaci výzkumu.

1 Introduction

Practitioner research as a way of helping practitioners develop and grow professionally has become common. Language teacher research, the form of practitioner research close to us, plays a significant role in our professional lives, despite the different job descriptions each one of us has.

Based on our own observations in the Finnish context, we believe that research that is relevant to teachers' teaching and their students' learning encourages teachers in many ways. Our own institution, the Language Centre at the University of Helsinki, has employed many research-active teachers and been active since its establishment in 1977, but it is only in the past few years that the Language Centre has taken planned and systematic steps towards involving a large number of teachers in teacher research (see Lehtonen et al., 2015). This conscious development has been elementary in many small-scale projects and has so far given rise to three Language Centre publications (Pitkänen et al. 2011, Matilainen et al. 2013, Lehtonen & Vaattovaara et al. forthcoming). It has also enabled the practice of including some research or research based development into a teacher's annual work contract, a practice that was not systematically and transparently encouraged in the past. It has allowed for small teaching reductions (rather symbolic in nature), which together with other support structures facilitate research but are not financially unfeasible. We deal with our local research support structures in some more detail below, in chapter 3 (see also Lehtonen et al. 2015 for a more detailed analysis).

The research-friendly work culture fostered in our Language Centre has convinced us that teacher research has the potential to empower. Because of this belief, we have sought to increase awareness of the topic both within and beyond our own Language Centre. The focus of this article is on teacher motivation for research engagement, based on survey data collected among Finnish university Language Centre staff across Finland, as well as on several workshops that the authors have been involved with over the past few years[1].

It seems that the forces driving teachers to conduct research and those preventing them from doing so have some universal characteristics. Workshops related to the topic of language teacher research have indicated that many language centre teachers in Finland identify the same barriers that prevent them from carrying out research. In the same vein, these teachers tend to agree on the factors that drive them to do research. Based on our workshop at the *Language Centres in Higher Education: Sharing Innovations, Research, Methodology and Best Practices* conference in Brno[2], European language centre teachers share similar thoughts about research engagement: they like the idea of carrying out research and they often do some, but sometimes find the barriers in their professional lives too great (see also Borg 2013: 115–123). However, it is clear that teachers, irrespective of where they come from, tend to feel strongly about the topic and would like to find ways to lower the barriers to research engagement. Encouraging teacher research is therefore important.

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[1] Vaattovaara, one of the authors, organised or co-organised three local workshops in different higher education language centres and one national workshop in Finland from 2012 to 2013.

[2] Workshop given by Lehtonen & Vaattovaara, *Research-based teaching development in language centres – barriers and drivers*.

This article has two aims. Using research findings as well as data collected in workshops, we aim to discuss 1) the motives of teachers to carry out or follow research in fields related to teaching and learning and 2) ways and methods that encourage or facilitate teacher research. To achieve this second aim, we briefly deal with the organisational support structures present in our own institution, and review some related literature and extract information on organisational structures from data collected in workshops. The two aims are intertwined: with no knowledge of the motives, it is difficult to encourage and facilitate teachers, while on the other hand, without facilitation it may be difficult for a teacher to get started with research. Hence, we will tap into both of these aspects, motivation and facilitation, in order to gain insights into removing the barriers and fostering the drivers of research engagement in Language Centre contexts.

2   Motives for research engagement

To research or not to research – is that the question?

Based on our experiences and workshop discussions, university language centre teachers tend to view research in a positive light (although there are some discrepancies). This is not surprising, because we work in universities that, by default, promote, follow and carry out research. However, language centre teachers as practitioners are, in our view, slightly different from their counterparts in other university departments. They often have a heavier teaching load than their departmental colleagues and a keen interest in teaching. Many of them have teaching qualifications, but not doctorates. Research – either following it or doing it (see Borg 2010) – is for many language centre teachers not the top priority. However, many language centre teachers share the types of motives to be research engaged that have been highlighted in research.

A recent online survey (ELTstat) aimed to find out what motivates English language teachers (ELT) in Britain to develop (undertake continuous professional development). The most common reasons given were to improve one's career prospects and develop as a teacher (personal development). Borg (2010: 408) refers to a larger study that concluded that teachers are engaged in research "for personal and professional reasons rather than due to external forces such as promotion or employer pressure".

The data collected in spring 2014 among Finnish university language centre staff indicate the same views[3]. Although reasons for research engagement were not directly

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[3] The national survey concerning research and development orientation and interests was carried out via an electronic form during spring 2014 across the university language centres of Finland. Responding was voluntary, and the response rate relatively low, i.e. the responses are possibly positively biased towards research engagement. However, the respondents represented all language centres. The data are owned by the FINELC research support network and available for research purposes to all its members.

asked in this survey, the majority of the 129 respondents agreed fully or partly with the claim *I feel that research engagement is a natural part of my work* (see Figure 1; also Rontu & Tuomi, in preparation).
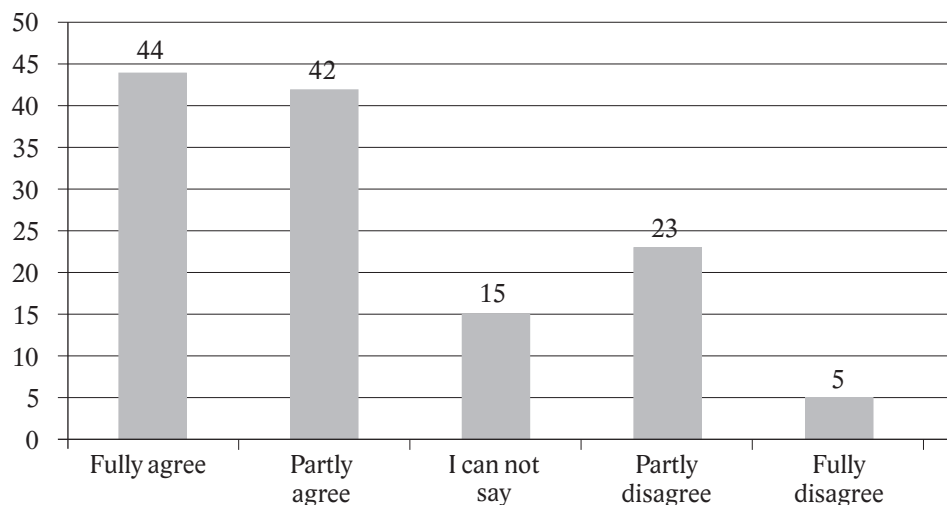

Fig. 1: *FINELC survey responses to the claim I feel that research engagement is a natural part of my work (N = 129)*

Open responses to the question *What else would you like to say about your relationship or engagement with research / research-based development of teaching?* shed some light on what is meant by research being a natural part of one's work. The responses often reflect a professional identity in which research-based teaching development is viewed as a crucial part of teacher identity rather than making a distinction between research and development. The following quotations exemplify the respondents' views:

It makes teaching more than an everyday chore. It gives you an aim and therefore a willingness to develop.

> *Tekee opetuksesta ihan erilaista kuin vain peruspullaa. Antaa tavoitteen ja sitä myötä halua kehittyä.*

I think that by working with students in an academic setting, and particularly working with researchers (PhD and above), it is natural and essential to be part of the research community rather than on the outside looking in. (Original in English)

I think that research engagement is an attitude and way of life. Being involved in research and development projects is already valuable and instructional as such, even

though the projects would not reach an end. And research never ends, even though papers get published.

> *Tutkimuksellisuus on minusta asenne ja elämäntapa. Se että on mukana tutkimus- ja kehittämishankkeissa on jo sinänsä arvokasta ja opettavaista, vaikkei mitään valmistakaan tulisi. Eikä tutkimuksesta valmista koskaan tulekaan, vaikka papereita julkaistaankin.*

These quotations undoubtedly do not correspond to the views and experiences of all language teachers, but it is worth noting that, according to the FINELC survey, 92% of the respondents agreed fully or partly with the claim *The development of teaching should be research based*. Only six respondents disagreed with the claim (of whom five only partly), while 74 fully agreed (45 partly agreed). Recalling that the responses may be positively biased towards research orientation, this outcome reveals where the motivation stems from for research-based teaching development.

It is also important to note that many respondents expressed their loneliness or lack of support in research engagement. The following two quotations indicate that it is not often the motive or even time that the respondents do not have. They seem to lack collegial networking, support or the initial "push" to get started:

In my view, a teacher should have time for research-based teaching development. However, a teacher should not be left alone, collegial collaboration could be fruitful.

> *Mielestäni opettajalla tulisi olla aikaa opetuksensa tutkimukselliseen kehittämiseen. Opettaja ei kuitenkaan saisi jäädä yksin, kollegiaalinen yhteistyö voisi olla hedelmällistä.*

I think I would be very interested in doing research, but I would need help at least at the start. I think that, in language centres, much more useful research would have been done if only some clear instructions had been developed: what could be done, how to start, where to get advice.

> *Luulen, että itse olen erittäin kiinnostunut tutkimustyöstä, mutta kaipaan apua ainakin alussa. Varmaan kielikeskuksissa olisi paljon enemmän hyödyllistä tutkimustyötä tehty, jos olisi kehitetty jotenkin selvät ohjeet: mitä voi tehdä, mistä voi aloittaa, mistä voi saada neuvoa.*

Many respondents felt that they did not have enough time to do research themselves, but many followed research published in the field:

I find I have little time for research/research-based development of teaching. There is hardly enough time to keep up with the development of the field; read what other people have written. (Originally in English)

The distinction often used by Borg (see e.g. Borg 2010) between *engagement with research* and *engagement in research* is useful in that it may have potential in encouraging a larger number of teachers to believe that they are part of the world of research. For Borg (see Borg 2010, Borg 2013), engagement with research means exploring for pedagogical relevance, reading and using research as a source of enhanced understanding of teaching (not as a direct solution to problems), and integrating insights from reading with the teacher's existing pedagogical practices and theories. In short, engagement with research is following and reacting to the developments in the field. In contrast, engagement in research means actively doing research. How "doing research" can be defined is difficult in the context of teacher research and, indeed, practitioners are often unsure whether their work on the development of teaching counts as research.

According to the FINELC survey targeted at Finnish language centre staff, 43% of the respondents were uncertain whether their work on teaching development counts as research. Out of the 129 respondents, 12 fully agreed and 44 partly agreed with the claim *"I'm often uncertain whether my work on the development of teaching counts as research or not."* (See Figure 2, and also Rontu & Tuomi, 2015).
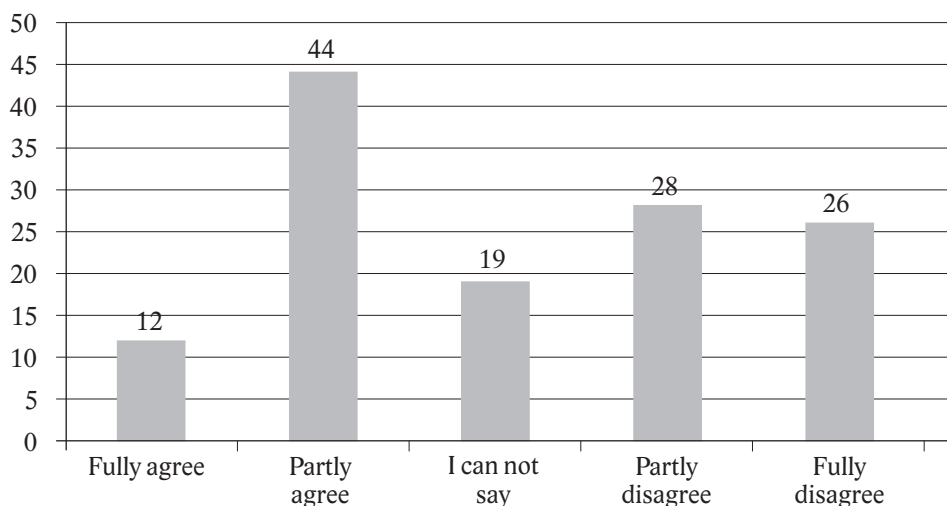

Fig. 2: *FINELC survey responses to the claim I'm often uncertain whether my work on the development of teaching counts as research or not (N = 129)*

This sense of uncertainty needs to be considered if the aim is to enable teachers to value their research-related work and to see this work as engagement in or with research. This sense can be overcome if we understand that teachers are research-engaged even if their research or development activities do not involve large sets of data or the use of statistical methods. Borg and Sanchez (2015: 1) suggest that

"a minimal definition of teacher research is systematic self-study by teachers (individually or collaboratively) which seeks to achieve real-world impact of some kind and is made public". We revisit this below with some concrete examples.

International workshop

The workshop we held at the *Language Centres in Higher Education: Sharing Innovations, Research, Methodology and Best Practices* conference offered us a possibility of sharing aspects of research-based teaching development in an international context. The aim of the workshop was to discuss both drivers for and barriers to research engagement, in a similar way to the workshops that we had been involved with in Finland (see chapter 1). The definition of what counts as research was not discussed (due to time limitations) but given in the introductory part. The other aim of the workshop was to establish a Europe-wide research network for language centre teachers.

Approximately 40 conference guests from ten countries participated in the workshop in January 2015. After a short introduction to the workshop, the participants were asked in small groups to reflect on research engagement. They were first requested to consider *what is required from their workplaces* and second, *what is required from them as individuals* if the goal is to encourage research engagement[4].

The group work revealed the following main trends. For the workplace to encourage research, it needs to allow for enough **time for research engagement** and enough **financial resources**. In addition, the workplace needs to recognise **different types of research**, not only research leading to academic qualifications, for example a PhD, but also **smaller projects**. According to the workshop discussions, the workplace also needs to **encourage personal growth** and **professional development**.

It became clear that although the participants came from different places and were heterogeneous in many ways, they largely shared the same set of challenges, or at least some of them (e.g. a lack of time and financial resources for research). Their workplaces and their support mechanisms varied to an extent, but many expressed frustration towards management policies – the fact that research engagement (in some places this meant other than PhD level research) of language teachers is not always encouraged by the faculties, department heads or other personnel in leadership roles, because language centres are considered as teaching organisations. One solution was suggested: establishing a "research-based teaching development" discourse instead of "research" discourse within a university, since it is evident that the tasks and duties of language centres differ from those of faculties and their research requirements. There is evidence from many contexts that language centres

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[4] The idea for structuring the workshop discussion in this way came from Borg 2010.

lack permission to carry out research, but hardly any institution forbids teaching development.

From the individual point of view, the groups brought up similar elements – the fact that an individual is sometimes prevented from doing research because of an **excessive workload**, **stress** and **time restrictions,** as well as a **lack of support** and **appreciation** by colleagues or department heads. One aspect was also a lack of **research skills** and the **habit of doing research**. On the other hand, an individual is driven to research because of **interest in networking** and **building contacts,** as well as **broadening one's expertise**. In addition, an individual often finds **personal satisfaction** and **self-development** as incentives for research engagement and is willing to be engaged in order **to renew and enliven teaching**.

The workshop in Brno reinforced our beliefs, created in other workshops and small get-togethers and widely covered in the literature, that teachers can easily identify barriers that they perceive to prevent them from being engaged in and with research. At the same time, they are able to identify driving forces that help them overcome these barriers.

Based on an extensive literature review, Borg (2010: 409) lists the following commonly expressed barriers to teacher research: non-collaborative school culture; limitations in teachers' awareness, beliefs, skills and knowledge; limited resources; demotivational factors such as research efforts are not acknowledged by colleagues or managers; economic matters; leadership attributes and political issues. It is not difficult to connect these factors to those raised in the workshop in Brno and discussed above.

Despite the obstacles teachers face in being engaged *with* and, especially, *in* research, they seem to find ways to overcome the obstacles, as evidenced by the wealth of literature on teacher research or research carried out by teachers (see e.g. Borg and Sanchez 2015 on teacher research, and Benson and Reinders 2011 and Nunan and Richards 2015 on language learning beyond the language classroom). The benefits of teacher research are numerous and can be observed at many levels. The personal and professional growth of teachers, including increased self-confidence, motivation and collegiality, have been noted (Borg 2013, Lehtonen et al. 2015). The institutions where teachers are research-engaged have been observed to benefit from increased activity and sharing, among other things (Sharp 2007 as quoted in Borg and Sanchez 2015, Lehtonen et al 2015). Students who interact with research-engaged teachers also gain, because their teachers are better informed and more confident (Bell et al. 2010, as cited in Borg and Sanchez 2015).

The following chapter first deals with the structures supporting research engagement in the Helsinki University Language Centre. After that, a voice is given to an

individual teacher (one of the authors) to provide an ethnographic perspective on how research engagement can be motivated and started on an individual level.

3   Facilitating teacher research

Structures for research engagement

We stated above that (among) the most powerful drivers for research engagement seem to be personal professional development/growth and ambition, making professional life and teaching more fun, and creating ideas together with colleagues (i.e. collaborative aspects of development). We have more systematically discussed elsewhere (Lehtonen et al. 2015) how collegial practices and a collaborative working culture foster individual agency, which is, in the end, social in nature (Wertsch 1993, Wertsch et al. 1993). Collegiality and collaboration are the building blocks of work at the Language Centre of the University of Helsinki aiming to encourage teaching development based on research.

Among our collegial and collaborative practices, we have several occasions throughout the academic year when we invite and support research engagement. First, we have an annual calendar at the Language Centre to guarantee that there is common time to participate – approximately half of the Thursday afternoons throughout the academic year are dedicated to common events (two hours). Within these time slots, every academic year includes four research seminars, one of which is extended to a low-threshold mini-conference. One important means for research engagement is also our publication series, which we return to in Johanna Manner-Kivipuro's story in the next chapter.

One of the most fruitful drivers of research engagement has turned out to be the modules of the University Pedagogy course, tailored to language centre staff and designed as project courses. The network of Senior Lecturers in University Pedagogy (one lecturer in each faculty and independent institute of the University, see Toom et al. 2013) offer courses in their local institutions, and courses tailored for the language centre staff have been available since 2011[5]. Two recent courses (5 ECTS) have been designed as project courses. The courses in the past two years have concretely driven research engagement: *Advising and counselling in language learning* in the academic year 2013–2014 and *Assessment and feedback practices in language teaching* in 2014 to 2015. The project design of the courses has enabled teachers to engage in research projects according to their own interests, and to receive systematic support for their research throughout the process. The benefit has not only been research engagement by individual teachers but collaboration, in many cases across language units (between teachers of different languages and teaching cultures). Both project

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[5] A position of Senior Lecturer in University Pedagogy was established at the Language Centre in 2010. The position is held by one of the authors (Vaattovaara).

courses have culminated in a common Development Day, at which the projects have been presented and to which the staff of the Language Centre and other interested university colleagues have been invited. This, again, has raised interest in research engagement among many colleagues. Many of the projects will also be reported in published articles, thus making the research public.

Participating in the 5 ECTS University Pedagogy (UP) course is not officially included in the teachers' annual workload, that is, the participants' teaching load is not reduced. It is evident that teachers do at times struggle with time constraints while being involved with course activities – such as the research-based development project – but the fact that teachers participate in the UP course essentially "in their own time" has never raised questions of principal or problems, based on our experiences as the course instructor (Vaattovaara), a Language Unit head (Lehtonen) and a language teacher (Manner-Kivipuro). It seems that taking part in a UP course is generally understood more as a natural part of work than as starting a research project as such, or at least the hurdle is lower. Nevertheless, conducting research in the UP course is a valuable idea as such for supporting teachers' research engagement.

Other elements also play a role in research engagement at our Language Centre: a Research Support Group (consisting of many teachers, led by the Senior Lecturer in University Pedagogy) to discuss and propose ways to support research engagement (for example, planning seminar sessions, keeping a reading blog, i.e. virtual reading group), the annual possibility of including some research in the annual workload by application, and the possibility of applying for conference trips. All these activities together give a clear message of research engagement being appreciated, which is important from the point of view of teacher motivation as well.

The following exemplifies a teacher's experiences in becoming engaged in and with research while taking two University Pedagogy courses designed as project courses and offered to language teachers in particular[6]. Johanna's verbatim account will, in addition to reflecting on her professional growth, highlight some of our organisational support structures that boost teacher development through research (for a more thorough presentation, see Lehtonen et al. 2015).

The story of Johanna

I have always been interested in research, but have not until recent years deliberately focused on developing my skills and knowledge in research-oriented teaching. I attended both of the project-type University Pedagogy courses offered to language teachers during the academic years 2013–2014 and 2014–2015, and they have acted as an incentive to get a better grip on research as a part of professional life. Before these,

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[6] Johanna Manner-Kivipuro shared this account at the *Language Centres in Higher Education: Sharing Innovations, Research, Methodology and Best Practices*, in her presentation *Developing as a Professional* (co-presented with Johanna Vaattovaara).

I had also taken some University Pedagogy courses at the university where I worked earlier, but the experiences from the last two courses have been the most interesting and educational so far, because in both of these courses we have carried out collaborative research projects.

In the first course focusing on advising and counselling, I worked on a project with three colleagues. Our goal was to obtain information on different attitudes towards and experiences of advising and counselling among students and teachers, and we collected data on personal advising from the perspectives of students and their respective teachers. In the latter course, focusing on assessment and feedback in language learning, I worked with a pair, and here our goal was to develop a testing tool for students taking a bilingual exam in both oral and written skills (CEFR level C1).

The former project has assisted me in my daily work by indicating the importance and power of counselling and through new ideas on giving personal advice. The latter project was a development project we would have been engaged in even without attending the course, but with the help of the course framework and the systematic support, we had the possibility to obtain feedback in all stages of our planning process, from both fellow course participants and the course instructors. Furthermore, the project work enabled us to pay more attention to the theoretical background for our project and discuss it in the light of earlier research relevant to our work.

In his state-of-the-art article published in 2010, Simon Borg presented his rationale for why teachers would benefit from research engagement. In the following, I reflect on my own relationship with research by structuring my views according to Borg's work.

Research helps me get deeper sense of my work, and find new ways of seeing. In the University Pedagogy courses, we worked on relatively small projects, but these projects helped us to see that research need not to be large in scale in order to be of importance. In other words, a doctoral thesis is not the only way to be able to find new ways of seeing and new ways of practicing. We had many discussions in the project groups and received immediate feedback on our thoughts from both our fellow course participants and course instructors. Sharing research data as well as the scientific literature helped me to gain new perspectives on the topics I was working on.

Research helps me identify ideas to experiment with in my classroom and find new ways of doing. The varying tasks we carried out during the University Pedagogy courses have encouraged me to also test ideas in my own courses. During the UP courses, we not only read about theories but also tested ideas in practice. We have, for example, experimented with problem-based learning: we have solved a given case with the help of supporting pedagogical theories given as background material. We once participated in an oral group exam (rarely used in Finland) to get an experience of this form of assessment practice. In the latest course I attended, my colleague and I carried out

a research project on portfolios as an assessment tool and I became inspired to widen the use of portfolios to other contexts.

Research helps us extend our discourse for discussing teaching and find new ways of talking. *The University Pedagogy courses, with a research engagement orientation, focused not only on discussing what it is to teach students, but also on having discussions with other teachers, exchanging opinions and sharing information about ongoing projects that are research based. The participants were teachers at different stages of their professional career, and this not only provided a fruitful starting point to learn something new, but brought a variety of perspectives to project development discussions.*

Research helps me validate with a theoretical rationale what I already do and also find new ways of knowing. *During the University Pedagogy studies, we read some of the latest research to update our knowledge of the field. This means that I often familiarise myself with topics I have not heard of. The courses and the projects that I and my colleagues in other groups have worked on have offered me some theoretical tools and background that help me understand or explain what I already do, and they also function as an inspirational gateway to the field of research. For example, a research project by another group inspired me to test different ways of activating the students to give peer feedback.*

All the reading has developed my academic skills and deepened my expertise in what I do with students. New ways of knowing have also been advanced by the continuous feedback I have received from the lecturers. I feel that we teachers widen our academic skills even by giving presentations – by getting a chance to present the projects both orally and in an article format. Our publication series is a good tool here, because there is a clear target for publishing our results, and it is almost guaranteed that the paper will get through after the peer feedback processes. Writing an article on the basis of a project makes us discuss the project in a scientific framework, which brings a new aspect to "knowing".

Research helps us examine our planning and decision-making processes and find new ways of thinking. *A University Pedagogy course is a safe environment to test my ideas, however wild they may be. Attending the course has sustained my daily motivation and helped me to develop new pedagogical ideas to be tested, but perhaps the most concrete and noticeable influence has been adopting research as both a tool and a source of inspiration as the foundation for planning and developing teaching strategies. This research engagement also feels like a natural part of my work, makes it meaningful and motivates me in finding new ways of thinking.*

Discussion and conclusion

In this article, we have dealt with the motivation for research engagement in the work of language teachers by using workshop data from the *Language Centres in Higher Education: Sharing Innovations, Research, Methodology and Best Practices* conference in Brno and a Finnish national survey (collected by the FINELC network) as a resource. After presenting the findings, which indicate that teachers are generally interested in or at least curious about research as part of their professional identity, we have discussed the importance of facilitation, by presenting some useful structures that have facilitated teacher research in the context of the University of Helsinki Language Centre.

Good practices include possibilities for conducting research together with colleagues, as well as opportunities to develop one's work through writing about it (Language Centre publication). A more ethnographic perspective is present in *Johanna's story* on research engagement, supported by the University Pedagogy course. This example shows how ways and practices of teaching development can grow through research engagement. An important aspect in fostering research engagement is collegiality or collaboration. For many teachers, doing research together is an important motivator, and our own publication series is a practical tool for finalising the projects (https://helda.helsinki.fi/handle/10138/25140?locale-attribute=en).

On the basis of the present data, our experiences and earlier workshops, as well as the research literature (e.g. Borg 2013), it seems that the barriers to as well as drivers for carrying out and following research are quite similar across language centres all over Europe, despite the fact that local circumstances vary: some language centres are more research friendly than others, and the institutional structures are not equally favourable in all places. However, if activities similar to those we have discussed can be fostered in language centres, research engagement will most probably grow. The "magic words" seem to be possibilities for collaboration and collegial support.

Among almost all the university language centres and their teachers we have come across so far, financial resources and (therefore) time are apparently the most commonly articulated barriers to research engagement. However, we have evidenced that if collaboration and some support are present, a more research-friendly environment emerges. It is also important that research engagement is appreciated by the managers.

We have expressed our belief that research engagement by teachers has the potential to benefit students, teachers and the wider community and to increase the quality of teaching and learning. Because we believe that promoting research engagement should not only be a local activity in our context, we are keen on establishing a cooperation network amongst the European language centres to share ideas and plan concrete actions. This was the second aim of the workshop held in Brno. Should you

be interested in becoming a member of such a network, please contact one of the authors.

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Bionote

Tuula Lehtonen, e-mail: , University of Helsinki (Finland).
Tuula Lehtonen is a senior lecturer in English and the co-head of the English Unit at the University of Helsinki Language Centre. She holds an MA and an EdD. Her research interests include personal relevance in language learning, students as users of language at work, teacher research and language support for students in the many, relatively new English-medium Master's programmes at her university.

Johanna Vaattovaara, e-mail: , University of Helsinki (Finland).
Johanna Vaattovaara (PhD, Docent) is a Senior Lecturer in University Pedagogy in the Unit of Support for Teaching and Learning at the University of Helsinki Language Centre. She is responsible for university pedagogy training and support for research for LC staff.
Her research interests include university language teaching and learning, language awareness and teacher research.

Johanna Manner-Kivipuro, e-mail: , University of Helsinki (Finland).
Johanna Manner-Kivipuro (MA) is a University Instructor in Swedish at University of Helsinki Language Centre. Her pedagogical and research interests include university pedagogy, autonomous learning, blended learning and communicative language teaching/learning.

Quality Assurance: A Balancing Act

Jitka Žváčková

Abstract: Language Centre Quality Assurance can be used for a wide range of purposes, from audits of services and procedures to reflection on best practices and improvements of language education. Quality Assurance systems across Europe differ considerably. The Czech Republic, unlike the UK or Spain, applies no unified national standards, and therefore, the Masaryk University Language Centre (CJV MU), in compliance with the Masaryk University strategic plan, is obliged to set its own standards and procedures. In order to achieve desired goals, CJV MU has adopted Quality Assurance systems developed, tested and used by University Language Centres associated in CercleS and focused on three major areas: the learner, the teacher and the Language Centre management. While the learner area follows a traditional path of standard questionnaires and the management quality is assessed in collaboration with external auditing companies and professionals, the teacher area represents a considerable challenge to the CJV MU. This paper shares our experience with the Quality Assessment of teaching. It overviews areas incorporated and strategies applied in CJV MU in the period 2012 to 2014, such as self-assessment questionnaires, course and individual lesson plan analyses, observations and feedback. It shares experience with some critical moments that threatened to undermine the usefulness and credibility of the whole process and lessons learnt from that experience. Finally, it identifies current results, concrete benefits and possible directions that could guarantee a high-quality teaching in a long-term perspective.

Key words: quality assurance, quality assessment, feedback, observations

Abstrakt: Tento příspěvek podává přehled hodnocení kvality kurzů a výuky na CJV MU v letech 2012–2014, představuje různé typy dotazníků, pohovorů a náslechů ve výuce, a hodnotí jejich dosavadní přínos pro zlepšování kvality jazykového vzdělávání v souladu s dlouhodobým záměrem Masarykovy univerzity.

Introduction

An international drive towards quality improvements in and transparent comparison across universities has recently placed a great emphasis on Quality Assurance (QA) in the field of tertiary education. Although the term QA has been widely referred to by academic and non-academic staff, student, government and other stakeholders (ISO9001:2008; ENQA, 2009; CELT Galway[1], 2015), understanding exactly what QA means in the complex and diverse world of Higher Education continues to be a considerable challenge (ENQA, 2009). This challenge becomes even greater when we bring into focus university language centres and their multiple roles.

The position of language centres is often rather specific because they cater for not only linguistic but also transferable and employability skills, and as service providers, they base their reputation on the quality of activities and services they provide. This

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[1] http://www.nuigalway.ie/celt/

is why 'Language Centres at Institutions of Higher Education are committed to the effective implementation of quality assurance procedures. They support their parent institutions' existing quality assurance procedures but also aim to develop additional measures that relate to their specific operational needs' (Vogel et al., 2010).

Such QA procedures differ considerably. However, Masaryk University Language Centre (CJV MU) follows best practices based on research results (Moise, 2011) and policies of experienced university language centres and associations (such as Helsinki University, CELT Galway and CercleS), and adopt QA in the form of a combination of external audits, evaluations and reports and Institutional Research. By Institutional Research we mean 'the practice whereby an institution assesses itself, its activities and its position within a given milieu…' with the aim to monitor specific and explore potential issues in order to be able 'to inform an institution's decision-making with regard to its own development' and to provide 'a comprehensive resource for information about the institution…' (O'Flanagan, 2005).

This paper focuses on the QA practice adopted by CJV MU during the Impact Project[2] in the 2012–2014 period. The first section of the text briefly touches upon the diversity of approaches to QA in language education in the European context and offers some insight into the QA situation at Masaryk University and CJV MU. The second section provides descriptions and analyses of QA and Quality Assessment methods, techniques and procedures of the CJV MU. The third section focuses on the lessons learned and the final section comments on possible future steps to be taken.

Language Teaching QA Approaches Context

When QA is considered in the context of language education, we need to understand that the existing QA systems across Europe vary considerably. According to the findings of the Grundtvig Learning Partnership, Quali-T and Quality in Language Teaching for Adults Projects, QA systems have different degrees and vary from monitoring learning satisfaction to the strict assessment of teachers and institutional performance. Countries such as the UK or Spain have their national systems of inspections and assessment procedures; others have QA systems that are respected on a national level but function on a voluntary basis; some other countries, such as Austria, Germany and Sweden, encourage standardization of QA but the actual system used is in control of each individual institution; and, finally, in countries such as the Czech Republic (or Estonia), no national standardization exists and each institution can develop its own quality standards (Benndorf-Helbig, 2011).

When we take a closer look at the Czech Republic, standards differ across the country to a similar degree the national systems do on the European level. However, recent

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[2] http://impact.cjv.muni.cz/

studies and reports indicate[3] (Roskovec, Šťastná, 2010; Šebková, 2012) that higher education institutions use QA standards in different ways: most institutions respect their normative character but some use them as a type of minimum level below which it is impossible to descend. QA standards can also be considered a starting point for future developments or, alternatively, they can concentrate on already existing routines and processes. Some institutions emphasize their achievement orientation and deal with their QA standards in terms of results, outputs, performance or specific goals. Each type of QA standards has its own advantages and disadvantages and therefore a combined approach is preferred by large institutions such as Masaryk University.

Masaryk University (MU), the second-largest university in the Czech Republic, is the leading higher education institution in the region. Strategic plans for Masaryk University include improvements in the quality of educational and research activities among its priorities, 'which is the reason why it closely monitors and evaluates both the internal and external aspects of them. The methodological management of the mechanisms for monitoring and ensuring quality is the responsibility of the Quality Centre, the Strategy Office and the Research Department.'[4] The internal evaluation of the study fields has been continually developed since 2008 'as one of the means of supporting the development of quality assurance mechanisms at MU' (MEAQ, 2015), while external feedback has been gathered since 2011 when MU joined the Institutional Evaluation Programme offered by the European University Association. The evaluation report completed in July 2012 'contains a critical description of some priorities, potential for improvement and especially recommendations for Masaryk University as to where and how to direct the development of a variety of activities.' (MEAQ, 2015).

Masaryk University Language Centre, the largest language centre in the country, provides language-focused services and support to the whole University, and enhances international cooperation and a continuous exchange of knowledge, ideas and information on a worldwide scale. CJV MU attempts to commit its work to the Wulkow 2010 Memorandum, which states that: 'The quality of language education, and consequently quality management in Language Centres, depends on realistic requirements and standards. These have to be negotiated responsibly with stakeholders in the global labour market, with political decision makers, with authorities in higher education and with students...' and that 'Language Centres at Institutions of Higher Education are committed to the effective implementation of quality assurance procedures. They support their parent institutions' existing quality assurance procedures but also aim to develop additional measures that relate to their specific operational needs...' (Vogel et al., 2010).

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[3] http://www.msmt.cz/vzdelavani/vysoke-skolstvi/standardy-a-smernice-pro-zajisteni-kvality-v -evropskem

[4] http://www.muni.cz/general/evaluation?lang=en

Quality Assurance at the Masaryk University Language Centre

Despite the common view that it is teachers who are the most responsible for the quality of education (Benndorf-Helbig, 2011), CJV MU understands that the success of any language centre activities depends on collaboration among all its stakeholders, most importantly on collaboration among teachers, learners and the university management and colleagues. This is why CJV MU appreciates the complexity of combined feedback and recognizes its importance. The following section presents results of external evaluation bodies, comments on a QA system related to the learner's perspective and finally analyses QA in the context of CJV MU teachers.

Feedback from external bodies

In order to increase and develop the quality of its activities, Masaryk University Language Centre can use findings of three external reports from recent years, namely a MU Sociological Survey Report from 2012, The European University Association (EUA) External Evaluation Body Report from 2012 and an annual Alumni Opinion Poll.

The MU Sociological Survey Report (2012) specified four areas of criticism from students: a lack of language courses, excessive numbers of students in seminar groups, the impossibility to re-enrol on to a course, and immense differences in language levels among seminar group participants. CJV MU teachers and MU students share the same opinion in this respect, as all four areas have frequently been identified as problematic by the CJV MU staff members. Apart from the description of the complexity of the current situation, the Report emphasized an enormous increase in interest in academic speaking and writing skills among students, which was followed by a partial modification of CJV MU programmes and the immediate introduction of academic/scientific writing and speaking courses into MU programmes (MU SSR, 2012).

The EUA External Evaluation Body Report did not focus on language education. Therefore, it only stated that 'while English is already the lingua franca of global higher education and research, significant advantages could arise through the further development of one or two other languages among staff and students, particularly in support of bilateral relations and exchanges. Language supports are already in place but may not be adequate in capacity or suitability in the face of parallel developments and of additional encouragements that may (and perhaps should) be introduced' and later recommended that MU 'measures regularly the effectiveness of language policies and supports' (EUAR, 2012).

Findings of the EUAR correspond closely with the average results of annual Alumni Opinion Polls (AOP)[5] from the years 2010–2014. Masaryk University monitors em-

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[5] http://www.muni.cz/general/evaluation/graduates

ployability and employment rates of its graduates, and gathers feedback on the quality of education received. AOP consists of two periodically implemented questionnaires ('Completion of studies at MU – looking back and to the future' and 'MU alumni employment after graduation')[6] that are 'given to students who are in the process of finishing their studies at MU and making the transition to full employment…' (AOP, 2015). The results of AOP indicate that more than 50% (53–5%) of MU students consider the number of language courses and the extent of language education (Question: How would you evaluate the extent of foreign language education in non--philology programmes with regards to your employability?) as 'slightly insufficient or absolutely insufficient' (AOP, 2014), which is alarming. The only exceptions to this opinion are The Faculty of Business and Administration and The Faculty of Education; their students indicated a relatively high satisfaction with language education (75% and 71%, respectively).

All the external feedback suggests that there is a great potential for CJV MU to improve, especially in the areas of a possible increase in the number of language courses it provides and in better targeting the current needs of diverse groups of students.

Student-related Quality Assurance

CJV MU also attempts to make full use of QA mechanisms that concentrate on student learning processes, results and their satisfaction. This is done by the application of diverse methods in two large areas, in student feedback and language testing.

Internal student feedback is obtained by different ways, where the most general one at MU used by students is a General Evaluation Poll (GEP)[7] in the MU Information System, which is gathered at the end of each course and term. The GEP focuses on areas such as: the teacher's knowledge of the subject matter, learning outcomes, the level of difficulty of the subject, preparation difficulty, sources accessibility or teaching style. Students can give a grade of one to seven and they can also write comments in the 'open answers' space. The GEP could be an effective feedback tool if it were used by the majority of students (less than one third of students usually take part), or if it were more diversified, focusing on specific academic fields. The fact that one type of questionnaire is available for courses as diverse as a lecture in philosophy, practical seminars in chemistry, PE trainings or practical language sessions make it not only too general but also too difficult to interpret. This is why a great number of CJV MU teachers use their own feedback questionnaire forms that target their groups and courses. They also ask for feedback in different ways, such as student panels, students feedback group discussions, reflective essays, internal reviews, teaching observation and research. A closer look at some feedback forms used at CJV MU is presented in the section 'QA Procedure Analysis'.

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[6] http://www.muni.cz/general/evaluation/graduates

[7] http://www.muni.cz/general/evaluation/poll

The second large area of QA related directly to students is testing and the results they achieve. Testing at CJV MU uses a combination of internal and external procedures, such as CEFR implementation (MU graduates need to achieve a minimum of B1, B2 and C1 CEFR levels in bachelor, master and doctoral programmes, respectively), extensive training, cross-national and cross-European benchmarking frameworks and collaborations. The CJV MU focuses fully on standardization because CJV MU, with its 9 000 students each term, needs to have a high level standardization in order to provide comparable results. CJV MU has its own testing unit that concentrates on test development, advice and QA. Findings of the testing unit are accessible to all CJV MU teachers at the CJV MU web pages.[8]

Teacher-focused Quality Assurance

CJV MU aims to provide 'language education that is fit for purpose' (Vogel et al., 2010) and deliver the highest standards of service to its students. In order to achieve this aim, it regularly monitors the development of its new and innovated courses and reviews the on-going courses. The first systematic QA procedures were applied in the 2009–2011 period, as a part of the Compact Project[9]. In the Compact project, 99 courses were either innovated or newly created, so after the piloting stage it was essential to assess their quality and ensure their continuing relevance. A combination of internal and external QA was applied. For the internal Quality Assessment, a Quality Assessment team was created and structured measures were applied. The results of QA processes had an extremely positive effect and were widely accepted and appreciated across the CJV MU. This was the reason why it was decided that the Impact Project, which followed in the years 2012–2015[10], included a relatively large section devoted to QA.

The aim of the Impact Project QA activities was not only Quality Assessment and QA of the Impact new and innovated courses, but also a sustainable QA system with realistic standards and procedures that could be used even after the project finishes. The following section presents an analysis of the materials and procedures the Impact QA team (Dr. Alena Hradilová, Mgr. Pavlína Dufková and Mgr. Jitka Žváčková) developed.

Quality Assurance Procedure Analysis

New QA procedures were tested on 44 out of 47 new and innovated courses developed and piloted in the Impact Project and involved 33 teachers who had developed and / or taught those courses. The QA procedure was divided into two stages: first, during the term, the teachers collected materials and created a portfolio of their course. This portfolio consisted of eight areas, namely a syllabus of the original

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[8] http://impact.cjv.muni.cz/publikace-a-vystupy/materialy/

[9] http://www.cjv.muni.cz/old/cs/projekty/projekt-compact/index.html

[10] http://impact.cjv.muni.cz/

course, a syllabus of the innovated course, a description of the innovated course, two lesson plans of two different lessons, a description of those two lessons, students' feedback, an observation report, and sources. Second, the teachers presented and discussed their portfolio after the term finished at a Quality Assessment interview. The individual parts of the most important areas are discussed below.

The syllabi of the original and innovated courses were collected in order to identify the extent to which both courses differed. The comparisons showed that individual proportions of changes varied significantly; the minimum change of a course content was approximately 40%, while the maximum changes of course content exceeded 80%. Those changes were not only quantified, a qualitative examination determined where exactly the changes took place and what the reason behind those changes was. The qualitative section identified details in the following areas: first, it was necessary to explain why the innovation took place. The reasons were, for example, outdated materials, change of teaching style or introduction of more technologies. The second area focused on what concretely was innovated. This section was further divided into three areas, namely the teaching style and methodology, materials and activities. The third area concentrated on benefits the innovators believed it could bring to both students and teachers. The benefits included ideas such as easier access to materials, a larger variety of materials or smaller student dependence on the teacher. The final area aimed at expected outcomes, its goal was to make the course authors formulate what they expect of the innovations in general. This whole material was broad and included a great number of theoretical or hypothetical sections.

A more detailed and practice oriented material focused on the description of the innovated course. This was divided into two parts: the first part focused on administrative information such as the course title, the course university code, an academic year and term in which it was piloted or run, the name of the MU faculty or department, language of the course and the names of the authors and teachers. The names of both course authors and teachers were important for the second stage, the Quality Assessment interview, because in cases where they differed, both were invited for the interview. The second part of the description concentrated on the course details from the formal point of view. It included ten areas: (1) The aim of the course as stated in the course annotation; (2) The length of the course, which was important because CJV MU courses vary from one term (12–14 weeks) to four term courses; (3) The number of face-to-face sessions per term – this can also differ, however, the most common system is to have one session per week; (4) The number of minutes per week of face-to-face sessions, which ranges between 45 to 120 minutes, however, most sessions last 90 minutes; (5) An expected student preparation time was a new section that surprised some of CJV MU teachers because it was something a great number of teachers had not thought about before, at least not in a specific or detailed way; (6) A type of student preparation areas caused similar difficulties as the previous point; (7–10) The last four points concentrated on students and their characteristics, they

were namely a target group, a target group needs analysis, expected CEFR level of students and a maximum number of students in a cohort.

The next section of the portfolio was a presentation of two lesson plans. The lesson plan information was formally divided into three time-referenced sections, the introduction, main activities and the ending and each of these parts was further subdivided into four distinct sections, namely teacher-student interaction, methods, materials used, and general aims of the session and particular goals of the activities. The lesson plans included one more section, session results and an evaluation of the session which allowed the teacher to reflect on the entire teaching process, Moreover, it was a place where they could compare what they had planned and how it finally worked.

The observation report material was based on observations in class. The observation process was divided into before-, during-, and after-observation sections. Each observation was always communicated by a member of the QA team at least one week before it took place. The teachers who were supposed to be observed were asked to provide the observer with course materials, teacher's materials and all other necessary information, such as homework, for that particular session so that they could get the whole picture of what was going on in that given session. Then, in class, the observers were usually introduced (sometimes teachers did not feel the need for an introduction, which was accepted) and they did not intervene in the session in any way. After the session, the teachers were given immediate five-to-ten-minute feedback and were informed they would receive a detailed report with complex comments and recommendations. The report was sent by email typically one week after the observation took place.

The second essential part of the QA procedure was the Quality Assessment interview. The interviews were organized by the QA team. All three members of the team were always present at the interviews, each performing a specific role; each member of the team prepared questions from a specific area of the QA process, a member who observed a class of an interviewee informed the other two members of the team about the outcomes and one member of the team was taking notes for the final report. The interviewees were represented either by one person (the author and a teacher in one) or by more people if a team took part in the course development and in the teaching process. Each interview was planned to last between 20 and 30 minutes, but sometimes it took longer, if more information was needed. The first series of interviews took place after the Autumn Term 2013 (September–December 2013) in the January–February 2014 period. This was followed by a collection of recommendations for changes and an analysis of the interview. The QA procedure was renovated and both stages (portfolio collection and interviews) were run again in the Spring Term 2014 (February–June 2014).

Outcomes from the pilot run in January–February 2014

The pilot stage in the September 2013–February 2014 period resulted in two types of outcomes: the first being a set of recommendations from the QA team to the teachers, and suggestions and recommendations for possible changes and improvements of the QA process to the QA team. Both will be discussed below.

Recommendations from the QA team to the teachers focused on details and issues specific to individual courses, course teachers and course authors. Moreover, they identified some procedural areas that could be generalized as recommendations for all CJV MU teachers. The first recommendation suggested that the teachers should work on their portfolio materials (especially their lesson plans and reflections) as soon after the session took place as possible. The portfolio preparation apparently ranged from three to fifteen hours, depending on when it was carried out. Teachers who filled in the forms or made detailed notes immediately after their sessions took place were able to provide much clearer descriptions in a much shorter time than those who prepared their materials after a month or longer time. This was caused by the necessity not only to remember an exact course of activities in that session, but also by going back to look for evidence and materials used. The second recommendation suggested a detailed description of online materials used in sessions. Teachers who used materials freely available online and noted down only their current link found later that if a particular piece of material had disappeared from the web page they had originally used, the time to find such a source again was incomparable to the search time of those links where the description of the content was available. The third recommendation targeted student feedback. Both teachers and QA team members agreed that the Masaryk University GEP provides poor results for the purposes of the CJV MU, so teachers should develop and use their own feedback forms that could match their needs better.

Recommendations to the QA team could be grouped into three broad areas: teachers called for a set of sample feedback forms they could use or work with; asked for a shorter assessment portfolio format; and wished for a new Quality Assessment interview content based on a reviewed Quality Assessment forms. The recommendations resulted in the development of a new Quality Assessment form that could serve as an outline which could prepare CJV MU teachers for the Quality Assessment interview. The reviewed form consisted of eight points: a summary of the piloting process based on the teacher reflection; satisfactions with the innovations made; positives and negatives of the innovations in terms of materials, teaching style and activities; necessary changes that should be made after the piloting; the extent to which the expectations of teachers have been met; student reactions; and recommendations for teachers who should teach the course, a type of teachers' notes and other comments.

A specific change based on the teachers' feedback was introduced in the area of the Quality Assessment process of language choice. The original Quality Assessment pro-

cess took place in Czech/Slovak, the mother tongues of the teachers. However, it was suggested that sometimes it could be easier to carry out the process in the language of a course for the reasons of practical issues such as technical terminology. This was accepted and the second Quality Assessment procedure was open to more languages.

Discussion

The Quality Assessment procedure at CJV MU in the 2012–2014 period was the first complex procedure that took the form of institutional research and attempted to combine different strategies in order to get a complex picture but also in order to be able to generate more practical and useful recommendations for the CJV MU teachers and management. Despite the fact that the majority of those who had gone through the process found Quality Assessment a helpful, positive and necessary activity (26), they found the forms clear and understandable (especially the February–June 2014 period), and they appreciated the Quality Assessment methodology, there appeared two areas that had brought considerable reservations – lesson plans and observations.

The lesson plans were the most disputed section of the portfolio materials. A great number of teachers found the form too detailed and held the opinion that a detailed lesson plan is unnecessary for experienced teachers because, for example, the teacher–students interaction often happens spontaneously and there is no need to plan and monitor that. This opinion was contradictory to the observation findings of the QA team, which showed that the level of experience and teaching skills differed considerably and the detailed analytical approach to the lesson plan development proved to be useful for most of them (20).

The second area that provoked major discussion was the observation part of the Quality Assessment. Despite the fact observations are generally considered as one of the most common and traditional parts of the teaching profession and a necessary part of QA procedures, they were criticized because one group of teachers still considered observations to be a threat and an expression of dissatisfaction with their work and another group, on the other hand, overestimated the possibilities of the observation process and required 'more qualified' observers who were not only language teachers, teacher trainers and methodologists but also experts in their specific academic fields. After consultations with the senior management and explanation of Quality Assessment rationale, the fact that observations form a regular part of the teaching profession and are by no means based on any prior negative expectation, and the possibility to select observers that could satisfy the requirements of their own choice, the Quality Assessment process was better accepted even by those who previously had some reservations.

Despite the criticized sections, the overall feedback on the Quality Assessment procedure was positive and most teachers appreciated the experience. Some teachers even

expressed their satisfaction and willingness to invite more observations in the future. The most positive reactions from the whole Quality Assessment process, however, mentioned the self-reflection section. A great majority suggested they would not do the self-reflection voluntarily, but once in the process, they enjoyed it and realized a great number of significant issues in their own teaching.

From the QA perspective, the most valuable outcome of the Quality Assessment process was the identification of best practice examples. The CJV MU obtained a database of courses, sessions, activities and teachers that can be recommended to others for observations and consultations. The next step towards a sustainable QA at CJV MU is the organization of workshops, mentor sessions and sharing sessions where CJV MU teachers can exchange their ideas, experience and materials on a regular basis. An online platform that can help intensify ideas exchange and best practices sharing within the CJV MU is also being prepared.

Conclusion

To summarize, the Impact Project enabled CJV MU to develop, pilot and run a Quality Assessment process in 2012–2014 that could serve as a basis for the development of a complex sustainable QA process at the CJV MU, complementary to the QA strategies of Masaryk University.

The Quality Assessment outcomes of the CJV MU QA team presented in this paper are by no means an example of a finished product. Rather it is an example of an initial exploratory stage of a continually evolving process that is being constantly refined and improved.

To conclude, the Quality Assessment team experience suggests that the promotion of the QA procedures via various means, such as Quality Assessment, institutional research or external audits, could encourage systematic work and efforts in the areas of self-reflection activities, best practice exchange and ideas sharing among CJV MU teachers, which as a matter of fact could further enrich and enhance the quality of CJV MU courses and services.

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Bionote

Jitka Žváčková, e-mail: zvackova@rect.muni.cz, Language Centre, Masaryk University, Brno.
Jitka Žváčková currently works for the Masaryk University Language Centre as a methodologist. She is interested in designing didactic materials, autonomous learning, further professional development for language teachers and language courses quality assurance.

eLADE: The University of Granada Bi-level B1/B2 Accreditation Exam. Construction and Validation Process

Aurora Biedma Torrecillas, Lola Chamorro Guerrero, Alfonso Martínez Baztán, Adolfo Sánchez Cuadrado and Sonia Sánchez Molero

Abstract: The Centre of Modern Languages of the University of Granada offers the eLADE B1/B2 (*Examen en Línea de Acreditación de Dominio de Españo*l[1]), the first e-Test of Spanish Proficiency to be completely reliable. This test is aligned with the CEFR and complies with the standards for best-practice assessment of international institutions. It is also recognized by all the Universities belonging to the Associations of Language Centres in Higher Education in Spain (ACLES) and Europe (CERCLES). In this article we will describe the test, its specifications and administration, together with the construction and validation process that make it the first online test of Spanish proficiency to be fully fair, validated and reliable. All this information is aimed for potential candidates and policy-makers, as well as other test developers, for the sake of transparency and good testing practices.

Key words: Spanish, language accreditation, online testing, test specifications

Abstract: El presente artículo describe el proceso de elaboración y validación del examen Elade B1/B2 (Examen en Línea de Acreditación de Dominio de Espaol), el primer examen en línea de espaol completamente validado. Este examen es desarrollado por el equipo de evaluación del Centro de Lenguas Modernas de la Universidad de Granada y se realiza cumpliendo con los más exigentes estándares y códigos de buenas prácticas en evaluación de los organismos internacionales, por lo que está reconocido por varias instituciones oficiales (como ACLES y CERCLES). En el presente artículo se describe sus especificaciones, así como su proceso de creación y validación con el fin de poner a disposición de todos los potenciales candidatos y responsables académicos, así como creadores de exámenes, la información necesaria, dentro de un marco de transparencia de buenas prácticas.

Abstrakt: Centrum moderních jazyků na Univerzitě v Granadě nabízí eLADE B1/B2 (Examen en Línea de Acreditación de Dominio de Español), první Proficiency e-test pro španělštinu, který je zcela spolehlivý. Tento test je v souladu s CEFR a splňuje standardy nejlepšího hodnocení mezinárodních institucí. Je také uznáván všemi univerzitami patřícími k Asociaci jazykových center ve vyšším vzdělávání ve Španělsku (ACLES) i v Evropě (CERCLES). V tomto článku popisujeme tento test, jeho specifikace a administraci spolu s procesem konstrukce a validace, které z něj dělají první on-line test Spanish Proficiency, který je zcela spravedlivý, legální a spolehlivý. Všechny tyto informace jsou zaměřeny na potenciální kandidáty a činitele stejně jako na další tvůrce testů za účelem transparentnosti a zlepšování testovacích postupů.

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[1] Spanish Testing and Accreditation Team (Aurora Biedma Torrecillas, Lola Chamorro Guerrero, Alfonso Martínez Baztán, Adolfo Sánchez Cuadrado, Sonia Sánchez Molero). Multimedia and design: (César Amador Castellón, Jesús Puertas Melero, José Rodríguez Vázquez)

1   Rationale behind an online Spanish accreditation exam

In today's global world, the demand for second language learning is an ever-growing concern. One particularly important requirement is the accreditation of the more widely-spoken languages such as English and Spanish, which has led to the development of standardized officially-recognized proficiency tests both for education and the job market.

The increased mobility among European students fostered by the Bologna Plan and the recent implementation of the Erasmus Plus programme beyond Europe have both brought about a considerable increase in the demand for Spanish language proficiency tests. At the University of Granada (UGR), it was felt necessary to address these issues, particularly given the high demand for graduate and postgraduate courses from students from different international programmes. The university faced the problem of how to satisfactorily certify students' level of Spanish, both to determine their ability to participate in courses and for the purpose of awarding financial grants. As in other European universities, the University of Granada established a series of benchmarks necessary for the correct assessment of students' language level.

While some prospective students were already accredited by the Cervantes Institute's internationally-recognized DELE exam, most either did not have access to an official examination centre or could not make the limited exam dates, while others simply presented unofficial qualifications which were deemed unacceptable for certification purposes. This situation put the university in the difficult position of having to award mobility grants without knowing if the student in question did in fact have the necessary level of Spanish. In response to this problem, the Department of International Relations assigned the University of Granada's Modern Language Centre the task of developing a bi-level B1/B2 proficiency test, which was subsequently carried out by the Spanish Department's specialist test development team in strict accordance with the directives established by the CEFR, EALTA, ALTE and the European Council (CoE, 2001; CoE, 2009; CoE, 2011; ILTA, 2000; ALTE, 2001; EALTA, 2004). The first administrations of this test were paper-based and took place in the University of Granada Modern Language Centre.

As a result of the complications encountered by some foreign students in taking a local paper-based test in Spain, it was decided to create an equivalent online proficiency test that would fulfil those students' accreditation requirements. In this way, students would be able to certify their language level from their own universities or education establishments, thereby securing their grants before travelling to Spain.

Furthermore, it was subsequently realized that other Spanish universities were also facing the same problem and it was therefore decided that the University of Granada should apply for national ACLES (Asociación de Centros de Lenguas de Enseanza Superior) accreditation status in order to be able to help them offer a viable proficiency

test to their own mobility students. Accreditation status was granted by ACLES and CERCLES in 2012 and subsequently by the CRUE (the Committee of Spanish University Rectors) in 2014.

More recently, demand from other quarters has also increased as knowledge of the ease of application and reliability of the eLADE exam has grown. This interest comes both from educational establishments such as secondary schools and language centres, and private individuals interested in accrediting their language ability.

2   General Description

The eLADE exam is an online, bi-level test which certifies candidate performance at either B1 or B2 level in listening and audiovisual comprehension, reading comprehension, and both written and spoken production, and interaction as defined in the CEFR.

Below is a brief description of the scales and descriptors used in the development of tasks for each of the linguistic competences assessed in the eLADE test.

Listening comprehension

A B1 candidate is expected to understand the main ideas of clear, standard speech dealing with everyday topics. A B2 candidate should be able to understand both abstract and concrete topics, as well as those specialized topics related to the candidate's professional or academic specialism. In both cases, candidates should be able to understand conversations between native speakers, conferences or presentations, announcements or instructions, broadcasts and recorded material. The difference between B1 and B2 in this regard is the length of the discourse and the level of complexity of the ideas expressed, even though in both cases there should always exist some form of explicit discourse structure (as opposed to the C1 level, where this is not a requirement). B1 and B2 level candidates should also understand audio-visual material such as most TV programmes and films, even though slow, clear articulation and greater visual support will be necessary at B1 level.

Reading comprehension

A B1 level candidate should be able to understand simple texts, which are either of a general nature or related to the candidate's field of expertise, to an adequate level. A B2 level candidate should be able to work easily with a large variety of texts due to a high level of reading vocabulary, even though their understanding may well be hampered by colloquial language and idiomatic expressions. The test aims to verify that candidates are capable of adapting themselves to the situation at hand, to different text types and reading goals such as scanning, searching, understanding instructions.

Written production

A B1 level candidate is expected to be able to produce simple texts with an adequate level of cohesion concerning everyday topics or topics of interest to the candidate, as well as certain other text types (i.e. letters, reports, notes, messages, forms etc.). A B2 level candidate is required to produce more complex texts, not only of a general nature but also those pertaining to the candidate's field of expertise, in which he or she should be able to express an argument as well as bring together or re-write information from several different sources.

Spoken production

A B1 level candidate is expected to maintain a short monologue with a degree of fluency in which he or she describes topics of interest, recounts experiences or provides simple arguments. In terms of spoken interaction, the candidate should be able to exchange information about standard topics and possess the necessary linguistic repertoire to be able to deal with everyday situations. To this end, a candidate is also expected to understand a native interlocutor both in formal and informal conversations. Once again, the difference between B1 and B2 concerns topic type, which in B2 contains a wider range of specialist topics as well as the necessary level of detail and complexity and the inclusion of arguments and relevant examples to illustrate the ideas expressed. In spoken interaction with native speakers a B2 level candidate should be able to maintain a conversation fluidly and naturally enough so as not to cause any strain between participants.

3   Description of the tests, tasks and items

The exam consists of four parts designed to evaluate six communicative linguistic competences. These are: reading comprehension, listening comprehension, written production and interaction, and spoken production and interaction. The exam lasts three hours fifteen minutes and all tasks contribute to the attainment of a B1 or B2 grade. Indeed, for accreditation at either level the candidate must pass all four parts of the exam.

The Table 1 shows the number and length of tasks in each part of the exam.

Tab. 1: *The number and length of tasks in each part of the exam*

Listening Comprehension	Reading Comprehension	Written Production and Interaction	Spoken Production and Interaction
5 listening/ audiovisual tasks	5 reading tasks	2 writing tasks	3 oral production and interaction tasks
45 minutes	75 minutes	60 minutes	10–15 minutes
Online	Online	Online	Via Skype or on-site at CLM

Listening Comprehension: 45 minutes

The listening comprehension part consists of five listening or audio-visual tasks. Depending on their content, at least two of the tasks are set at B1 level and at least two at B2 level. The duration of each recording varies between two to five minutes. Recordings are sourced from news items, reports, conferences and adverts containing descriptions, arguments, explanations or instructions. The social register employed is standard (informal, formal and/or academic).

In total, the tasks consist of 25–30 items (5–10 per task). Each recording is heard twice. Item types on comprehension tasks are the following: a) three- or four-option multiple choice questions; b) multiple match questions; c) short answer questions with a maximum of five words.

Reading Comprehension: 75 minutes

The reading comprehension part consists of five reading tasks. Depending on their content, at least two of the tasks are set at B1 level and at least two at B2 level. In total, there are between thirty to thirty five items (5–10 per task). Texts length ranges from 250–380 words at B1 and from 350–500 words at B2.

The texts chosen are taken both from personal and public domains and are all written in a standard social register (informal, formal and/or academic). As far as possible, text selection aims to cover different text types (e.g. emails, articles, editorials, reviews, adverts, guides and instructions among others), different linguistic functions, as well as providing a variety of topics.

Item types for reading comprehension tasks are the following: a) three- or four--option multiple choice questions; b) short answer questions with a maximum of five words; c) True (T), False (F) plus justification; d) multiple match 1: reinsertion of a previously-extracted word or piece of text in its original position; d) multiple match 2: matching text and items from two separate columns.

Written Production and Interaction: 60 minutes

The written production and interaction part consists of writing two texts, the first of which can be completed at B1 level, while the second requires B2 level language. The B1 task is 15–200 words long and the B2 task is 250–300 words long.

Candidates must produce two text types: a) a neutral or informal letter/e-mail, or narrative; b) a formal letter/e-mail, article, report or essay. Each text type demands a specific type of discourse – descriptive, narrative, explanatory, or argumentative (this last only at B2).

Spoken Production and Interaction: 10–15 minutes

The spoken production and interaction part of the test consists of three tasks: the first two are designed to evaluate B1 level while the third task evaluates B2.

The first task consists of an interview of between 2–3 minutes long which covers personal questions about the candidate (country of origin, work, studies, likes, etc.). The second task is between 2–4 minutes long and is structured as a role-play interaction in which the candidate must be able to successfully resolve a dispute. Task three is a presentation or monologue on a controversial topic of 4–5 minutes in length in which the candidate must explain and argue their point of view and which serves as a springboard for further discussion with the interlocutor for 2–3 minutes. This task is not improvised as the candidate has 10 minutes to prepare prior to the beginning of the interview. For tasks 2 and 3 the candidate may choose between three options.

Marking Criteria

Both the written and oral production and interaction parts of the exam are marked following CEFR recommendations. Accordingly, the marking scales for the marking of written production and interaction the following criteria are taken into account: 1. task fulfilment; 2. coherence; 3. accuracy; 4. range. Furthermore, spoken production and interaction scales also take into account fluency (5.) and interaction (6.).

4 Test development and piloting

The eLADE exam is subjected to protocols and guidelines of good practice at all stages of its planning and design procedure in order to assure the following: a) its conformity to the CEFR; b) its validity, fairness and reliability; c) its appropriateness of level; d) its aptness for the correct evaluation of its intended use in the accreditation of Spanish language proficiency at B1 and B2 levels. (Alderson, 1998; Bachman, 1990; Bachman, 1996; Bachman, 2004).

Both the written and spoken production and interaction parts are developed based on an analysis of content and linguistic functions relative to language use context and the required ability at B1 and B2 levels. Tasks are developed to be functionally valid for the candidates doing them, particular care being taken that they do not contain any elements which would either favour or penalize any one type of candidate. All speaking and writing tasks are trialled with students, natives and expert judges to check the clarity of the instructions and the suitability of the level of the prompts and capacity to elicit the expected samples of spoken and written language. Elicited responses should provide sufficient evidence in terms of quantity and quality to be able to give an accurate and fair assessment of a skill when applying relevant assessment scales and criteria. Both spoken and written production tasks are double marked. Crucially, the above procedures are subjected to critical analysis during benchmark-

ing sessions in order to avoid the potential biases which may be encountered in this type of test and standardize exam protocol. To this end, the team has developed and continues to revise its test specifications, scales and marking criteria, double marking protocols, mark sheets, and revision protocols. Furthermore, statistical analysis is used to determine both intra- and inter-rater [JS1] reliability of both production parts of the exam.

Similarly, reading and listening comprehension test design is subjected to critical analysis by expert judges, L1 speakers, and L2 speakers. The selection of source material, text-mapping by expert judges to identify relevant information, task design and item revision processes are all carried out according to previously established protocols in order to ensure both face and content validity. Tasks are then piloted and subjected to reliability analyses. Reading and listening comprehension tasks are subjected to both classical analysis using SPSS and Rasch analysis using the WIN-STEPS program.

5 Test Administration

While the eLADE test may be taken at the CLM, the University of Granada's modern language centre, it can also be administered in any centre around the world which has undertaken a prior agreement with the university to this effect.

Where no test centre is available near a candidate's place of residence, they may request that their local academic institution apply for accreditation through our web page. To be eligible for accreditation, academic institutions are required to have access to the necessary technical resources specified in the administration guidebook and to sign a confidentiality agreement in which examiners agree not to disclose any details of exam content. Similarly, each exam centre must assign an administrator who will follow test procedures before, during and after the exam administration in order to confirm the candidate's identity and ensure they sit the exam individually without either outside help or the use of reference materials. While this individual need not speak Spanish in order to administer the test, they must have a basic grasp of English as the administration protocols are written only in English or Spanish.

Upon candidate registration, the examining centre concerned is assigned a date and time for the oral exam. Administrators are not required to undergo any special training but do however receive detailed instructions about exam protocol for the administration of each part of the test, including timing, necessary technical resources, and candidate instructions.

6   Design of the online exam: Technical aspects of the eLADE test

Compatibility

From the very beginning, the eLADE test was designed to be administered at a global level. For this reason, one of the main challenges was to design a platform that would allow its administration using computers with low resources and which would be easily accessible from any device with internet access. To that end, the platform has been specially designed using the Web 2.0 protocol in order to guarantee the greatest degree of compatibility possible with candidates' devices.

Security

Candidates must pass through a two-tier security process in order to sit the exam. Firstly, access to the exam web page is kept secret until just before the exam. Secondly, a username and password are required to log onto the webpage. While the webpage may be previously accessed by administrators in order to test compatibility, the exam itself cannot be accessed without the introduction of the candidate's personal access details. To further improve exam security, the platform itself is run from a secure server.

Technical considerations

Video reproduction uses the *webm* codec in order to ensure a high degree of compatibility with browsers. This codec is decoded by the browser itself and does not require any external software.

In order to deal with any keyboard problems resulting from the specific nature of the Spanish alphabet and punctuation system, the exam platform includes a small tool for the introduction of Spanish characters and diacritic marks. The function keys on candidates' keyboards are also disabled remotely to avoid possible input errors.

Candidates' answers are saved and updated in real time to an online database. This data is 100 % recoverable should a technical problem occur. Due to the fact the exam is both timed and monitored, it can be re-started from exactly the point in which the error occurred.

7   Validity Statistics

This section provides information on the use of statistical analysis to assess exam validity both as a whole and for individual component tasks and items in order to help ensure it does indeed test its objectives at the correct levels. The eLADE exam is subjected to both classical (SPSS) and Rasch (WINSTEPS) analysis. As well as reliability data, these programs allow the collection of data about mean scores, discrimination,

population correlation statistics, item facility value, and standard measurement error, among others, providing detailed information with which to develop and revise exam material.

Test Reliability and Item Discrimination

Reliability is the extent to which a test measures what it is supposed to and the degree of confidence we have that there is no undue influence by elements outside the area of linguistic ability being measured, helping us to ensure that evaluation is stable and only affected by increases in linguistic ability. Reliability is measured using statistical software on a scale between -1 and $+1$, where $+1$ is the ideal result and indicates that candidates who repeat a test twice without having increased ability will obtain the exact same results. For acceptable reliability, a test should have a reliability of .7 or above. The overall reliability score for first eLADE exam administration was .909, with individual reliability of .883 and .752 for the listening and reading parts respectively.

Discrimination

Discrimination is the ability of an item to differentiate between candidates of higher and lower language proficiency. Good items are those which are only answered correctly by candidates of the correct level and are answered incorrectly by candidates of lower ability. However, whether it is due to bad or ambiguous item design, or for other reasons, this does not always occur and lower ability candidates may answer correctly while those candidates who do have the level actually get the item wrong. An item of this type is considered bad as it does not tell us which candidate has the higher ability level and should therefore be discarded. A good discrimination index in CTT ranges from .250 to 1, with 1 as the ideal (Green, 2013). To date, all items which contribute to the eLADE exam have had a discrimination index of between .250 and .643.

Tasks to be included in final version of the eLADE exam are chosen through a selection process in which the reliability, discrimination, standard error scores from the statistical analysis of the piloted tasks are used to decide which items are appropriate for creating a meaningful bi-level B1/B2 test which will provide enough information to extrapolate a fair grade. Of the ninety five listening and reading items first developed, forty-three (45.2 %) were discarded as not having the correct level of difficulty, not having optimal discrimination or because they did not contribute to the overall reliability of the test. Of the final fifty two items used for the administration, the listening part contained twenty-nine items and the reading part twenty three.

Cut Scores

In order to ensure that the exam and its component tasks and items do indeed assess B1 and B2 proficiency levels, Rasch analysis is employed to calculate individual item difficulty and standard error independently of the test population as a whole.

Rasch results help us make important decisions about the final exam format by providing information on item difficulty, measurement error, discrimination, the number of levels that can be assessed using a bank of items, test form (that is, its ability to evaluate its intended elements, which requires the elimination of those items which do not conform to the general test model). Together with expert judgement, Rasch analysis helps us to decide on cut scores for the levels to be tested.

Item level and relationship to the CEFR levels is established according to the Table 2 (North and Jones, 2009), where B1 items are considered to be those which have a logit value between -1.23 and 0.72 and B2 items have a logit value of between 0.72 and 2.80. Only items with an acceptable difficulty level and measurement error scores are selected for inclusion in the final exam.

Tab. 2: *Item level and relationship to the CEFR levels*

Level	Cut-off	Range on Logit scale
C2	3.90	
C1	2.80	1.10
B2+	1.74	1.06
B2	0.72	1.02
B1+	−0.26	0.98
B1	−1.23	0.97
A2+	−2.21	0.98
A2	−3.23	1.02
A1	−4.29	1.06
Tourist	−5.39	1.10

Correlation between the Different Parts of the Test

Once tasks have been designed with appropriate items, they are tested to see if each of the four parts of the exam do indeed serve to assess different types of abilities. Here, the correlation coefficient shows us the extent to which two parts of the test contain similar elements which overlap and which would therefore constitute a higher percentage of the material assessed in the exam. If the aim is to design tests which assess different abilities (e.g. listening assessment vs. speaking assessment), responding to these tasks should elicit the use of different cognitive features, strategies and knowledge sets. Correlation should ideally be low, between 0.4 and 0.6.

For the eLADE test, correlation between speaking and listening comprehension parts is 0.6, an indication that they do indeed measure different abilities. The same method

is also used to test the individual relationships between each and every other part of the exam.

Setting cut scores and grading

In the listening and reading comprehension parts of the test, cut scores (the number of items a candidate must answer correctly to pass the exam at each level) are established using the Angoff method (Cizek, 2011; Council of Europe, 2009) which consists of two rounds of assessment in which item difficulty level is decided by expert consensus. The question is which items a candidate performing at the minimum required level should be able to answer correctly. From each round of discussion, the judges' average response is taken as the proposed cut score. During this process, Rasch statistics are also taken into account to provide further perspective (see Figueras, 2011).

Once cut scores have been established, judges also take into account and discuss other variables such as pass rates, item facility values and measurement error and re-establish cut scores accordingly by consensus. As previously mentioned, the eLADE exam uses Rasch results as a further analysis tool in a third round of discussion to help determine individual item difficulty (Figueras, 2011).

The spoken and written production and interaction parts of the exam are evaluated using a holistic scale specially developed in accordance with CEFR criteria. The written production and interaction scale has the follow criteria: task fulfilment, coherence, range, and precision. The spoken production and interaction scale contains the following criteria: fluency, coherence, monologue, precision, range and interaction. Both speaking and writing tasks are double marked. In the spoken production and interaction test, one assessor acts as interlocutor. All assessors undergo periodic standard-setting sessions.

The eLADE exam does not compensate between skills and candidates must pass all four skills at the desired level in order to obtain accreditation. However, the test results detail the grades obtained for each specific skill as well as that of the final level achieved. Therefore, it is perfectly possible for a candidate to achieve a B1 overall while obtaining a higher mark in one or more particular skill. Individual skill grades may be carried over during the next two exam administrations, which allows candidates wanting to improve their result to retake the exam during this time and improve their overall result.

8 Conclusions

The University of Granada eLADE exam has grown beyond its initial intended purpose as a local mobility accreditation test to become an accreditation test for any person interested in certifying a CEFR language proficiency level in Spanish for either

personal or professional reasons. The exam has a simple, attractive online format, is easily and globally accessible and is validated according to internationally agreed criteria. All of these factors contribute to making the eLADE exam a useful, reliable and necessary tool for both the education community and the public at large.

Thanks to recent technological developments, we now have the opportunity to give anyone who wishes it the chance to obtain an L2 accreditation at CEFR B1 and B2 from anywhere in the world. This technology has the same potential to allow us to provide further accreditation at A1, A2, C1 and C2 proficiency levels. It is our belief that the future provision of valid, easy-access exams such as the eLADE test for all CEFR levels will be a major contribution to the promotion of the Spanish language at a global level.

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Bionote

Aurora Biedma Torrecillas, e-mail: xxx, Centro de Lenguas Modernas de la Universidad de Granada
She is a Doctor in Spanish Philology from the University of Granada. She has been a teacher of ELE and Literature at the CLM (U. of Granada) since 1993 and has also taught at the University of Heidelberg (Germany). She has been a member of the ACLES Accreditation Commission since 2013.

Adolfo Sanchez Cuadrado
He holds a BA in Translation and Interpretation from the University of Granada and he gained a Master's Degree from the University of Delaware (USA). He has been a teacher of ELE and Translation at the CLM (U. of Granada) since 2000. He is an accredited evaluator for the DELE exam at all levels.

Lola Chamorro Guerrero
She is a Doctor in Spanish Philology from the University of Granada. She has been a teacher of ELE at the CLM (U. of Granada) since 1993. She collaborated in the development of exams in Spanish for the European Certificate (1992–1999), financed by the EU Lingua programme.

Alfonso Martinez Baztan
He has a European Doctorate in Spanish Philology from the University of Granada, having done his thesis on the evaluation of languages. In 2010 his book *The evaluation of languages: guarantees and limitations* (Octaedro) was published. He has been a teacher of ELE since 1989, and has worked at the CLM (U. of Granada) since 1996.

Sonia Sanchez Molero
She graduated in Spanish Philology at the University of Granada and holds a Master's degree in Applied Linguistics in Teaching Spanish as a Foreign Language from the Antonio de Nebrija University. She is accredited as an examiner for the DELE exams at B1 and B2 levels.

On the Effect of Using Different Scoring Methods for Two Versions of a Test

Martina Hulešová

Abstract: This article presents a study of the effect of a different scoring method on the construct of the Czech Maturita English examination. In particular it focuses on decision consistency made on the basis of the test results and the implications for test fairness and validity of the interpretations of test results. Questions are discussed concerning construct validity, decision consistency and fairness by comparing the test results of two versions of the same test, but with different scoring. The findings show that rescoring causes changes the weights of skills measured by the tests, and thus changes in construct; decision consistency of the tests with different scoring was low, and therefore the interpretation of the results of the two test versions cannot be the same. It was found in this particular case that the students tested do not change their strategies, as they believe that the tests are equivalent and fair, and they are not conscious of the possible consequences of rescoring. On the basis of the results, this article tentatively concludes that introducing different scoring may increase unreliability and cause unfair decisions and judgements of students' ability.

Key words: fairness, construct, scoring method, equivalence

Abstrakt: Změna skórování testových verzí souvisí se změnou váhy ověřovaných dovedností a posunem v definici konstruktu, čímž znesnadňuje interpretaci výsledků testovaných ve dvou verzích téhož testu stejným způsobem. Závěry studie naznačují, že při změně konstruktu je problematické považovat testové verze za paralelní či ekvivalentní a že může docházet k ohrožení validity závěrů a spravedlivosti rozhodování o úrovni dovedností testovaných.

Introduction

In the last 25 years many new high-stakes national examinations have been developed in Europe, and many of them are forced to compromise on best practice due to a variety of internal and external institutional constraints: the availability of resources, political pressure, the non-existence of a national strategy for education, poorly designed policies, etc. (Pižorn & Nagy, 2009; personal communication). In situations where the very existence of the exams or institutions is threatened after every national election, it is very difficult to find stability and resources to conduct research on issues such as fairness or validity, or to apply principles of good practice. Instead of learning from experience, many institutions repeat the same mistakes and poor decisions.

The Czech Maturita exam (the upper-secondary school leaving examination) is a high-stakes exam and its results (especially a pass or fail) influence the lives of the test-takers. Thus, issues such as fairness, test versions' equivalence over a period of years, construct validity, etc. become highly relevant. Changes in the exam format

might threaten construct validity and the interpretation of the results. One of these changes was the decision to change the scoring method in 2012.

Ethics, fairness, construct validity

Ethics and fairness are two of the most important issues in language testing. Test providers, developers, and users have to be sure that a test is fair to the candidates. The concept of fairness is closely related to the validity of the interpretation of the test results and to the rationale of the test specifications and test construction process. Striving for fairness and validity of the test results increases in importance in high--stakes contexts.

Validity studies are extensive in the testing literature; however, there are very few practically oriented studies (case studies or validation studies) that discuss the whole process of test validation from the very initial steps of the test development, including the preliminary decisions involving test purpose, design and score uses. Few studies discuss the rationale for selecting a particular scoring method and item weighting, especially for receptive skill testing – organizations usually provide information about how they score their tests, but they do not explain why a particular scoring method is used. The same applies to the literature about item weighting.

Two important concepts of test fairness were introduced by Messick (1995): the 'freedom from bias in scoring and interpretation, and the appropriateness of the test-based constructs or rules underlying decision making' (p. 742). He also suggests that construct validity is a comprehensive concept '… based on an integration of any evidence that bears on the interpretation of meaning of test scores – including content- and criterion-related evidence' (p. 742), with construct representation as its fundamental feature. For him, construct representation refers to the processes, strategies and knowledge involved in the process of task solving, resulting in scores. Test score, for him, are 'an extensible set of indicators of the construct.'

According to Messick (1995), there are two major threats to validity: construct under-representation and construct-irrelevant variance. We consider that varying the scoring or item weighting across test versions is one way in which construct--irrelevant variance is introduced and thus, the construct validity can be affected; we state that if two versions of the same tests are not scored equally, the constructs of these two tests might not be identical and it might not be possible to interpret the constructs in the same way.

Scoring methods

Scoring methods operationalize the meaning of the score and the construct represented by the items. The weight of an item must reflect the construct, or at least it must not add construct-irrelevant elements.

Chapelle (2012) states that "(t)est developers need to provide backing for whatever assumptions underlie the scoring procedures" (p. 26). Alderson et al. (1995) discuss the practical aspects of scoring, such as score form, correction for guessing, and weighting of items or tasks. They define weighting as giving more or an extra value to some items or groups of items (Alderson et al., p. 149), because testers believe those tasks or items are more important for or more representative of the content domain, more difficult or time consuming, or require higher proficiency, and they identify the reasons for weighting test components: components are significant indicators of language proficiency, assess the curriculum content or are particularly time-consuming. However, the authors agree with Ebel and Frisbie (1991) that weighted scoring can be more effectively replaced by adding more items, or using other scoring models, for example, the partial-credit model. According to Jenkinson (1991), scoring and weighting might express the values of the test developer rather than the values of the test stakeholders (p. 1413); if weights are summed to form a total raw score, this raw score can be reached by many different ways. This is important for the construct validity, i.e. for the interpretation of score meaning, as this issue might be a threat to construct validity.

Rotou, Headrick and Elmore (2002) emphasize the importance of a careful selection of the scoring method used for deriving final test scores, since such methods might have substantial effects on score interpretation and subsequently on decisions about test-takers; scores must be interpreted in terms of the construct and the score interpretations must be consistent.

In sum, two scoring methods used for different versions of the same test which yield different results and different (inconsistent) final decisions, are unacceptable in many contexts, but dangerous in high-stakes contexts because of the risk of flawed decisions that affect test-takers.

Research context and research questions

In 2011, a new examination system was introduced. English was one of the compulsory exams. Test specifications valid from 2009 weight each test item equally (1 point). The total weight of a subskill is represented by the total number of items focusing on this subskill, not by assigning more points to a particular item. The internal proportions of subskills were carefully weighted and related to the construct and content described in the test specifications based on the CEFR (2001) descriptors for the B1 level. This scoring method was used in 2010 and 2011 (about 8 test versions). But in 2012, scoring was changed and about half of the tasks were double-weighted.

The Maturita is a high-stakes compulsory exam; thus, issues like parallel form reliability of test versions or test version equivalence, construct validity, and test fairness become highly relevant.

On the basis of the context outlined above, the following research questions were formulated:

Question 1: To what extent do different scoring methods affect the interpretation of the construct being tested – construct validity?

Question 2: To what extent do different scoring methods affect the post-test decision making process in criterion-referenced high-stakes exam[1]?

We hypothesise that:

- The construct changes when item weights change.
- Decision consistency for pass-fail results is low for two test versions when scored differently.
- The results of two versions of the same test cannot be interpreted in the same way when each version is scored differently.
- Students use different test-taking strategies when different scoring is applied.
- The use of different scoring methods for two equivalent test versions threatens the construct validity and the test fairness, as it affects negatively the interpretation of test results and thus the reliability of decisions based on the test scores.[2]

Research design

Participants (a convenient sample of future Maturita test-takers) sat two reading test versions, which were scored by different methods – Method 1 where all items scored one point, and Method 2 where half of the items scored one point and half of the items scored two points. Finally, participants filled in a questionnaire about their test-taking strategies or participated in interviews and observations. Participants' teachers took part as administrators and also filled in a questionnaire about the test-taking strategies they had taught.

Teachers evaluated their students as B1 students. Unfortunately, not all students took both tests and for this reason, the total number of participants decreased to 141 students (right-hand column of Table 1).

Test A is the complete reading subtest from the 2012 Sample Exam. Test B was compiled from two versions of the live tests used in May 2011, to minimize the potential learning effect.

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[1] For practical reasons, the research was restricted to the B1 English reading subtest.

[2] The research hypothesis states that ANOVA (analysis of variance) two-way repeated measures will find statistically significant differences given the scoring method, which will also affect decision consistency. Using different scoring methods for two versions (A and B) of the same test leads to inconsistent classification of the test-takers as passing or failing, and simultaneously, the construct of the tests changed in that the interpretations of the results are different when using scoring method 1 and scoring method 2.

Tab. 1: *Structure of the group of participants*

Type of school	Teacher ID	Class ID	Year 4	Year 3	*N* of students	*N* of students (both tests)
Vocational school	MD	1	X		12	12
	ZS	2	X		9	9
	ZS	3	X		8	8
	VK	4	X		14	14
Grammar school	EP	5	X		18	15
Vocational school	AL	6	X		6	6
Vocational school	LK	7	X		24	19
	LK	8		X	11	11
Vocational school	AR	9	X		19	16
	AR	10		X	17	13
Vocational school	EL	11		X	13	10
	EL	12	X		9	8
Total		12	119	41	160	141

Table 2 shows the comparison of the old scoring valid until 2011 and the new scorings applied in 2012. The scoring has remained dichotomous, with 15 out of 25 items double-weighted.

Tab. 2: *Old and new scoring of Tests A and B*

	Task 1	Task 2	Task 3	Task 4	Maximum score
	5 short texts 5 MCQs (4 options)	1 text 10 true/false items	1 text 5 MCQs (4 options)	5 matching items (7 options)	
Old scoring (Tests A1_B1)	5 points	10 points	5 points	5 points	25
New scoring (Tests A2_B2)	5 points	20 points	5 points	10 points	40

Two questionnaires were used (teachers' and students' questionnaire). The former contained closed questions about which tests from the Maturita website teachers had practiced with their students and which test-taking strategies they had taught their students. The students' questionnaire contained closed and open questions asking students which tests they had practiced and what strategies they had used when taking the tests. The main aim was to investigate what kind of test-taking strategies were used during test-taking and whether students use different test-taking strategies in two tests with different scoring methods.

Observations were conducted in four classes with the aim to see what students were doing with the tests while taking them. The observation schedule was very simple, mainly note-taking and describing the observable behaviour, such as reading the information on the title page, underlining in the test booklet, movements signalling thinking, self-correction, moving pages and deciding where to start, etc.

Interviews were conducted with students pre-selected during the observation. The criteria for the selection were their willingness to participate, the quickness or slowness in solving the tests, and some aspects of their behaviour such as constant movement, browsing through the test, etc., which might have indicated the use of test--taking strategies. Interviews were semi-prepared, meaning that if necessary, additional questions were added in order to further illuminate any issue. Interviews were conducted with individual students and in one case due to time constraints, with a small group of respondents. In total, 10 students participated (see Table 3).

Tab. 3: *Techniques used in the study*

Type of school	Teacher ID	N both tests	N both tests and signed questionnaire	N observations	N Interviews
Voc. school	MD	12	12	12	3
	ZS	9	1	9	
	ZS	8	8	8	
	VK	14	12	14	4
Grammar school	EP	15	17		
Voc. school	AL	6	6	6	3
Voc. school	LK	19	1		
	LK	11			
Voc. school	AR	16			
	AR	13			
Voc. school	EL	10	12		
	EL	8	8		
Total		141	77	49	10

In order to account for test-order effect, the subjects were divided into four groups and the balanced testing design described in Table 4 was used. Each group received one of the four possible combinations of Tests A and B and scoring Methods 1 and 2.

Tab. 4: *Balanced testing design*

Group 1	Group 2	Group 3	Group 4
A1: Test A Scoring 1	B1: Test B Scoring 1	A2: Test A Scoring 2	B2: Test B Scoring 2
B2: Test B Scoring 2	A2: Test A Scoring 2	B1: Test B Scoring 1	A1: Test A Scoring 1
$N = 41$	$N = 32$	$N = 32$	$N = 36$

Preliminary assumption

A series of assumptions about the tests had to be accepted as valid because gathering evidence of all aspects of validity is beyond the scope of this study.

1. The construct of Tests A and B is based on the definition of reading at the B1 level of the CEFR (2001); the items included in the tests are content-relevant and a representative selection of the construct.
2. The tests are criterion-referenced; their purpose is to measure how well students achieve the aims defined in the Czech curriculum.
3. The cut score at 44% expresses the standard set by the Czech Ministry of Education, whereas a cut score of 65% expresses the mastery level for the B1 standard[3].

Preliminary analyses

Preliminary analyses were conducted with the aim to investigate test order effect, test equivalence, item quality, score distribution and its suitability for parametric analyses.

ALTE Multilingual Glossary of Language Testing Terms (1988, as quoted in Khalifa & Weir, 2009, p. 193) defines equivalent tests as tests that:

> "are based on the same specifications and measure the same competence. To meet the strict requirements of equivalence under classical test theory, different forms of a test must have the same mean difficulty, variance, and co-variance, when administered to the same persons."

This is a very strict definition and very difficult to attain in practice (Taylor, 2004, as quoted in Weir, 2009, p. 193), and given the fact that CERMAT probably does not use an IRT based item bank, it is almost impossible to attain this. The difficulty in attaining the statistical equivalence in practice is also stated in the Manual for Language Test Development and Examining (MLTDE, 2011, p. 82).

To investigate test equivalence, content analysis and a series of statistical analyses were conducted and the results are discussed and considered in relation to the difficulty in attaining test equivalence.

Preliminary analyses – conclusions

Tests A and B resulted in almost identical content, showed sufficient quality, with one exception (Item 12, Test A), which had near-normal score distributions and almost equal variance. There was a statistically significant difference in mean difficulty, but

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[3] This cut score was set from a 2011 standard setting project using the Cito variation of the Bookmark method (Verhelst & Hulešová, 2011).

with a small effect size. The sample size was large enough (Ntotal = 141) and the data were independent. Two apparent "outliers" were real data and could not be removed.

Research analyses

ANOVA (analysis of variance) was used to investigate whether different scoring methods really affect the results of the students. Content analysis compared the weights of subskills before and after rescoring. Decision consistency was investigated as an indicator of reliability in CR tests (for 44% and 65% cut score levels). Analyses of teachers' and students' questionnaires on test-taking strategies, how they influence both the way students complete the test and the results, were conducted.

Findings

Questionnaires, observations and interviews: summary

When students received the tests, 20% of them declared they did a quick survey of the entire test; the same number was looking for the information about whether they would be penalized for omitted or incorrect answers. 40% planned the time they needed for parts of the tests; 20% decided to start with other than the first part. Only 4% reported starting with the highest valued items and 13% of students reported they had started with the easiest items, but "easiness" had a different meaning for each of them, as there was no pattern of what the easiest part was since they started with different parts. Students guessed very little, or they made an 'educated guess'. The number of missing answers was quite low, probably because the test was not speeded and it was perceived as relatively easy for most of the students. Students also reported they did not change their answers at the last moment (90%) and they did not copy (95%).

Observations (*N* = 49) and interviews (*N* = 10) did not reveal new or surprising information other than that revealed from the questionnaires. Only a few students went through the test before they started answering it, solving the test mainly in a linear way as they were afraid of omitting something; no signs of misunderstandings or problems with the tests were noticed. However, nobody had read the title page of both tests: they did not read any information, or they read the title page of the first administered test only. They explicitly stated that they had believed that the information on the title page was always the same and they did not think about the consequences of the new scoring. This was in spite of the fact that they were told the aim of the survey and they were informed about different scoring, and that the scoring was less important for them than to do the tests as a whole, and they might use this information in case the test was difficult or timed.

Research question 1:

To what extent do different scoring methods affect the interpretation of the construct being tested (construct validity)?

ANOVA results showed that there is a statistically significant effect of the scoring method on the test results expressed as a percentage correct score, although the effect size is only moderate (Pallant, 2007, p. 208)

Figure 1 provides a graphical representation of the ANOVA results. The graph shows which test the test-takers were given in each group and also the relative positions and differences in the means of both groups and both tests. In order to be sure, a t-test for comparing the means of Group X and Group Y in tests A and B with old scoring (one item – one point) was performed and no significant difference was found (Appendix F).

Knowing that no order effect exists, that there is no difference between groups when tests are scored with the same scoring method and that test-taking strategies do not affect the way students took the tests, it could be concluded that the observed effect is caused by the use of different scoring methods.

Tests A and B were treated as equivalent, although slight differences or issues were found: there is a small difference in the content represented by the items; a statistically significant difference between test means was discovered (test A is slightly easier), but with a very small effect size. Two outliers and one item of poor quality was found in test A (item A12).

If all these findings are included in the interpretation of ANOVA results, a tentative conclusion would be that **the rescoring emphasized the test differences and affected the relative difficulty of the tests for the sample under study, making the rescored tests slightly easier**: Test A was found to be slightly easier than test B at the beginning of this study using the same scoring method (Section 4.2.1.4). After rescoring, Group X took A1 and B2 and the rescored test B2 became more similar to the test A1 in terms of percentage of correct answers. Analogously, Group Y took the originally scored test B1 and the rescored test A2 and the difference in the percentage of correct answers became larger.

Research question 2:

To what extent do different scoring methods affect the decision making process in the criterion-referenced high-stakes exam?

Decision consistency analysis focused on the extent to which the two test versions consistently classify students into pass and fail categories (masters or non-masters).
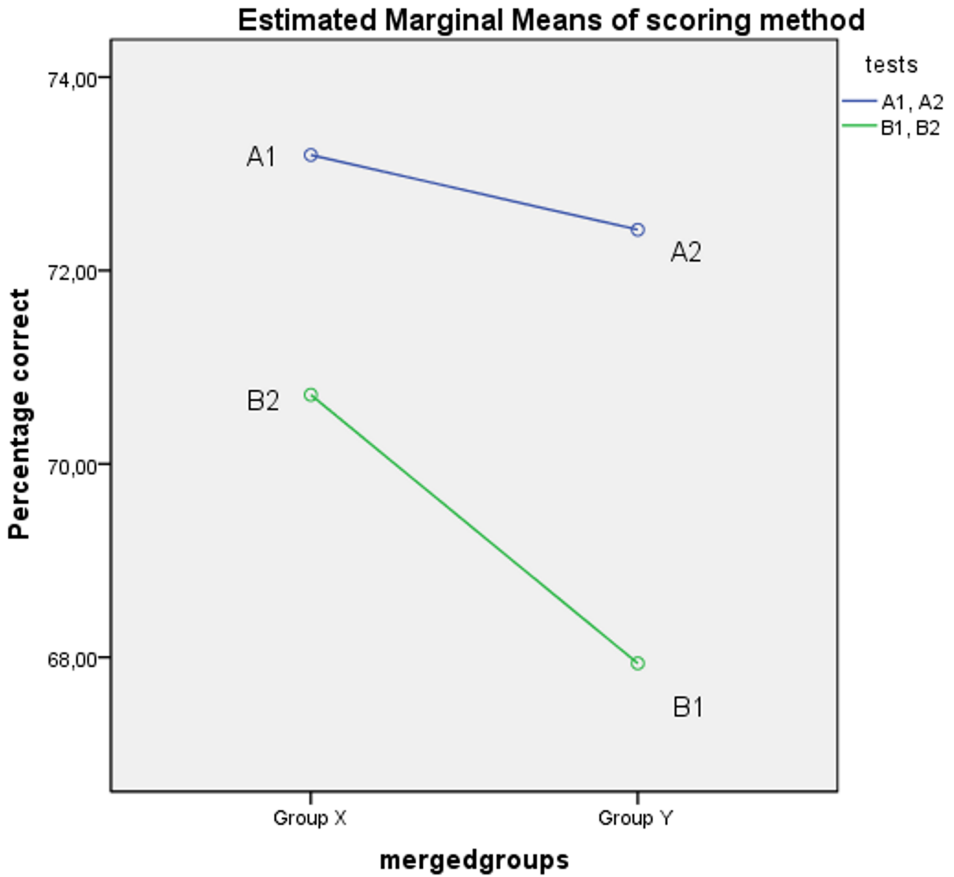
Fig. 1: *ANOVA plot for scoring method effect*

The combination of original and rescored tests was used and Kappa[4] analysis was performed.

The interpretation of the Kappa coefficient is complicated by the fact that other factors can influence its magnitude. Although Landis and Koch (as quoted in Sim & Wright, 2005) proposed the frequently used standards for strength of agreement for the Kappa coefficient (0 = poor, .01–.20 = slight, .21–.40 = fair, .41–.60 = moderate, .61–.80 = substantial, and .81–1 = almost perfect), Sim and Wright (2005) opine that these and similar criteria are arbitrary and the interpretation is incomplete if all the factors that influence the Kappa coefficient are not reported and discussed. For

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[4] Kappa – one of the indices of consistency.

this study, three relevant factors were identified: prevalence, bias and probability of occurrence of the categories.

Prevalence expresses how much the proportion of agreements on the master classification differs from that of the non-master classification (Sim & Wright, 2005). A high prevalence index means that chance agreement is also high and Kappa is lower accordingly. A high prevalence index can be seen at the 44% cut score level: in Group X, the prevalence index is .84, in Group Y is .83, whereas the prevalence index in Groups X and Y at the 65% cut score level is considerably lower: .32 and .24 respectively, which means that with the low cut score level almost all students are classified as masters and the category of masters is dominant.

Bias is a kind of a complementary index to the prevalence index and expresses the extent to which the classifications disagree on the proportion of masters or non--masters (Sim & Wright, 2005). At the 44% cut score level, the bias-indices are 0 (Group X) and .01 (Group Y), which is logical as there is a very low number of failed students. At the 65% cut score level, where the proportion of failed students increased, the bias index (its absolute value) is slightly higher, but still very low: .05 in Group X and .17 in Group Y.

Another factor that influences the magnitude of Kappa is the probability of occurrence of the categories. Kappa is usually higher if the occurrence of all categories is equally probable (Sim & Wright, 2005). Here we have only two categories, master and non-master, and given the criterion-referenced nature of the tests and the overall ability of the sample of test-takers, equal probability of occurrence of masters and non-masters cannot be expected – more masters than non-masters are expected for both cut score levels, but especially for the 44% cut score level. This is also confirmed by the results showing that the 44% cut score has almost no power in classifying test-takers into the master and non-master category; the Kappa coefficient related to the 44% cut score is very low; the standard error associated with Kappa and the prevalence index are extremely high.

This study tentatively concludes that scoring method has a small observable effect on decision consistency (master vs. non-master classification) when the 44% cut score is applied, regardless of whether Test A or Test B is used. When the 65% cut score is applied, the number of failed student increases and greater differences can be seen. **It might indicate that there is an interaction between the effect of the cut score, the test version, and the scoring method.** If the Kappa values of Group X and Group Y at the 65% cut score level are compared, it can be seen that while the Kappa for Group X increased substantially, the Kappa for Group Y is substantially lower and it even decreased when compared to the Kappa of Group Y at the 44% cut score level.

This study tentatively concludes that **scoring method influences the decision consistency and also has a small observable effect on the difference in difficulty be-**

tween the two tests: this effect is almost imperceptible at the low cut score level, but it becomes relevant when the new scoring and higher cut score are applied: test A1, when rescored as A2, becomes even easier, and the differences in relative difficulty or percentage correct are accentuated (see Figure 1). If the higher cut score of 65% is used, fewer students pass; therefore, the consequences of rescoring are more visible than if we do not rescore or do not apply the 65% cut score. Found Kappa values, their changes at different cut score levels and all three factors (prevalence, bias and probability of occurrence) confirm this conclusion. The difference between the observed Kappa and 1 (the maximum theoretical value of Kappa), which indicates the total unachieved agreement beyond chance (Sim & Wright, 2005), is rather large in all four Kappa values. Standard errors are very high, especially at the 44% cut score level.

The content analysis provided another view on the test versions' comparability. Only three judges did the analysis, but their agreement was very high. The results of the content analyses support the findings. Rescoring changed the internal weight proportions of skills emphasizing search reading and scanning over global reading (from 60:40 to 75:25). It is also probable that this change caused even small differences in the difficulty of the originally scored tests (as observed by PASW and WINSTEPS[5] analyses and t-tests) to become higher after rescoring.

Conclusion

The results suggest that applying different scoring methods to the same versions of a test might cause a substantial shift in the internal proportion of the weights of the skills that constitute the construct being measured. Consequently, the same test- takers taking two tests might achieve different results expressed as a raw score or percentage correct due to the different scoring method. In the light of these two findings, it can be argued that the performance of test-takers taking two versions of the same test, but with different scoring, cannot be interpreted in the same way due to the effect of the scoring method on the construct to be measured and on the observed performance. The change found in the construct of tests A and B, and thus, in the interpretation of the results, represents a threat to construct validity, which confirms Messick's emphasis on construct representation as one of the basic features of the construct validity evidence (Messick, 1995), and casts doubts on the meaningfulness of weighting items when improvement of reliability and validity of test scores is pursued (Ebel & Frisbie 1991; Alderson et al., 1995).

Thus decision consistency is rather low, and test fairness seems to be threatened. It can be suggested that direct consequences of this inconsistent decision-making process are more clearly visible when the cut score is set around the measures of central tendency (mean and median). If the cut score is too low (e.g. 44%), it loses

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[5] PASW and WINSTEPS – statistical software.

its meaning as a functional borderline between master and non-master categories, as it does not distinguish well between those categories. If a test is not consistent or reliable, the interpretation of its results cannot be fair and valid.

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Bionote

Martina Hulešová, e-mail: mhulesova@volny.cz, AJAT – Association of Language Testers in the Czech Republic
Graduated in Spanish philology (Charles University), taught Spanish for 16 years. Graduated from the University of Lancaster (Language Testing). Worked for Maturita project for 11 years. Lecturer, consultant in language testing. PhD student at MUNI (Brno). Researcher at Research and Test Centre (ÚJOP UK).

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