The changing medium of instruction policies of state-schools in recently formed states: a comparative analysis.

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Thesis submitted for the degree of Doctor of Philosophy (Comparative Education)

UCL, Institute of Education

2022

"I, Fiona Victory, confirm that the work presented in my thesis is my own. Where information has been derived from other sources, I confirm that this has been indicated in the thesis."

Abstract

In this thesis I analyse changes to the medium of instruction (MOI) policies of primary and secondary schools of new states which gained independence after the end of the Second World War up to 2015. In it I view MOI policies as drivers of linguistic state building, with decisions to use additional languages for teaching and learning being evaluated in terms of the threat that they may pose to the status of official languages and established patterns of social opportunity and status associated with knowledge of them. I develop and use an expanded version of Bourdieu's theory of the national linguistic market as a conceptual framework to capture the interaction of factors both inside and outside of the state which may influence MOI policy decisions.

The existing comparative literature consists mainly of descriptive studies of individual states or geographical regions. My study is distinctive because it focuses on new states and uses a large, longitudinal, sample to provide a global perspective on the choices that new states have made about MOI policies in primary and secondary schools and how these policies have changed. My methodological approach is distinct, using qualitative comparative analysis (QCA), an approach which is currently underutilized in comparative education research, particularly in studies with a temporal component.

I develop a novel MOI typology, identifying four distinctive models: Purist (only the state language(s) are used); Pragmatic (community languages are used in primary schooling); Accommodating (high status community languages are used in secondary school); and Opportunistic (new, high status, languages are introduced as MOI). I argue that, whilst Bourdieu's concept of linguistic markets provides a powerful basis for understanding MOI policy decisions, the interaction of national (internal) linguistic markets with the international (external) linguistic market needs to be considered to fully understand patterns of MOI policy change over time.

Impact statement

By stepping away from the classroom and shining a comparative light on patterns of medium of instruction (MOI) policy choice within state-school systems I give educational policy makers and researchers the opportunity to better understand how the national and international linguistic market can influence decisions on how languages are used in schools. These forces can be overlooked or hidden when the education systems of individual states are considered in isolation. This alternative, case-based, comparative perspective on MOI policy choice may help policy makers and their advisors to make more thoughtful choices about how languages are used within the education systems for which they are responsible.

The broad comparative scope of this project was made possible by the adaptation and application of Charles Ragin's qualitative comparative analysis methodology (QCA). This project serves to demonstrate to other comparative researchers how QCA can be used as a strategy for structuring the collation, comparison, and systematic analysis of large quantities of documentary data.

Acknowledgements

This thesis would not have been possible without the practical, academic, emotional and professional support which has been so generously given to me by my academic community. Thank you all.

Particular thanks go to my supervisors, Prof. Paul Morris, Prof. Andy Green, and Prof. Julia Sallabank.

And also to Dr. Christine Han – who kept me going.

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Glossary of terms

ACALAN	African Academy of Languages
ASEAN	Association of Southeast Asian Nations
AU	African Union
BBC	British Broadcasting Corporation
CIA	Central Intelligence Agency
CLIL	Content and Language Integrated Learning
COMPASSS	COMParative Methods for Systematic cross-caSe analySis
ConN	consistency of necessity
ConS	consistency of sufficiency
CovN	coverage of necessity
CovS	coverage of consistency
EFA	education for all
EU	European Union
GPE	Global Partnership for Education
ISCED	International Standard Classification of Education
ISO	International Organization for Standardization
L1, L2	first language (mother tongue), second language
language-of-state	the language(s) used in high-level state-controlled domains
LIE	language-in-education
LPP	language planning and policy
MDG	millennium development goal
MDSD	most different system design
MOI	medium of instruction
MSSD	most similar system design
MT	mother tongue (also used to describe languages spoken within, associated with, or ascribed to, a particular community)
National Language	a language used as MOI across a whole country in addition to the language-of-state (e.g. Kiswahili in Tanzania)
OAU	Organization of African Unity
OECD	Organization for Economic Cooperation and Development
P1, P4	first year of primary school, fourth year of primary school . . .
PISA	Programme for International Student Assessment
QCA	qualitative comparative analysis
R	data analysis software
RoN	relevance of necessity
SDG	sustainable development goal
UIS	UNESCO Institute for Statistics
UN	United Nations
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UPE	universal primary education
USSR	Union of Soviet Socialist Republics (the Soviet Union)
WB	the World Bank
WW1	World War One
WW2	World War Two

State names have been coded using the current ISO (International Organization for Standardization) standard country or area codes for statistical use (M49). Countries which no longer exist have been coded using the M49, 1975 standards where available (UN Statistics Division, 2006). Codes marked * were created for this project.

AHG*	Austro-Hungarian Empire	**MKD**	Republic of North Macedonia
BLR	Belarus	**MUS**	Mauritius
BEL	Belgium	**NAM**	Namibia
BEN	Benin	**NLD**	Netherlands
BFA	Burkina Faso	**NZL**	New Zealand
BWA	Botswana	**OTT***	Ottoman Empire
BFA	Burkina Faso	**PHL**	Philippines
CIV	Côte d'Ivoire	**POL**	Poland
CMR	Cameroons	**PRT**	Portugal
CSK	Czechoslovakia	**ROU**	Romania
CZE	Czech Republic	**RWA**	Rwanda
DEU	Imperial Germany	**SEN**	Senegal
ERI	Eritrea	**SGP**	Singapore
ESP	Spain	**SUN**	Soviet Union
EST	Estonia	**SVK**	Slovakia
ETH	Ethiopia	**SVN**	Slovenia
FRA	France	**TGO**	Togo
GAB	Gabon	**TJK**	Tajikistan
GHA	Ghana	**TKM**	Turkmenistan
GMB	Gambia	**TLS**	Timor Leste
GNQ	Equatorial Guinea	**TSR***	Tsarist Russia
GRB	Great Britain	**TTO**	Trinidad and Tobago
HRV	Croatia	**TZA**	Tanzania
IDN	Indonesia	**UGA**	Uganda
JAM	Jamaica	**UKR**	Ukraine
JPN	Japan	**YUG**	Yugoslavia
ITA	Italy	**ZAF**	South Africa
KAZ	Kazakhstan	**ZMB**	Zambia
KEN	Kenya		
KGZ	Kyrgyzstan		
KOR	South Korea		
LSO	Lesotho		
LTU	Lithuania		
LVA	Latvia		

1 Introduction

This study was inspired by my experience of teaching in the public school systems of several different countries. Despite these countries being in different parts of the globe and having very different histories and socio-economic characteristics, I recognised similarities in the ways in which school language policies both reflected, and were used to manipulate, patterns of language status and use. I also became increasingly aware of the power of school language policies. Not only did they function to restrict or open up access to education and employment (Myers-Scotton, 1993; Phillipson, 2012; Tollefson, 2002a), they were also used to define and reinforce linguistic national identity. This led me to investigate how these similarities could be explained and whether they were found in other countries. I did this by comparing medium of instruction (MOI) policies, the decisions that governments make about how language will be used in schools for teaching and learning, using an extended version of Bourdieu's concept of linguistic markets which I developed to analyse how ambitions for linguistic state-building interact with globally promoted attitudes towards language-in-education best practice.

In addition to their role in creating and maintaining a state's formal shared linguistic identity, I am interested in the implications that MOI policies have for affecting access to, and success in, a state's education system – particularly for students whose preferred languages are not used within the school system. I do this by following the MOI policy trajectories of 42 new states from independence to the present day (2015). I agree with Bernard Spolsky that "*language and language policy need to be looked at in the widest context and not treated as a closed universe*" (Spolsky, 2004, p. x). So in my exploration of MOI policy choice I consider the potential economic, political and diplomatic values that specific languages may have both within and outside of a country.

1.1 MOI policy and the linguistic market

In Indonesia there is a collection of official, patriotic songs which are commonly sung in schools during assemblies, flag-raisings, and other official gatherings. One of the more popular songs is entitled *Satu nusa, satu bangsa, satu bahasa* (One land, one nation, one language) which encapsulates the essential role (both

practically and ideologically) that the Indonesian language played in the creation of the modern Republic of Indonesia (Rahardjo, 2001). The use of national language policies which promote and privilege a titular language – the language of the state – to create, or strengthen, a shared national identity is a widely adopted practice. The concept of the strong and united nation being a monolingual nation is a meme which is frequently used to justify or explain the use of a single "national" language as the medium of instruction within state-school systems. This use of a common language (in formal domains at least) is associated with the intertwined concepts of utility (ease of communication between the citizen and the administration) and social cohesion (ease of communication, and increased understanding, between citizens). In contrast, resistance to granting language rights to minority groups has been justified in some cases by reference to worries of encouraging possible irredentist or secessionist tendencies (Hamid, 2016; May, 2008b).

State-schools are provided by governments not just to teach children to read and write, but also to teach them how to be citizens of their country (Green, 2013). This aspect of state formation is often (but not invariably) associated with the promotion of an ideal model of a distinct and homogeneous formal public identity for the new state's citizens. A key component of this identity will be the language selected (either deliberately, or through the uncontested continuation of tradition) for use in public, formal, official, and judicial situations. The use of the selected language marks its users with a sign of national membership every time they speak or write. It also acts, depending on a person's linguistic repertoire, as a barrier or facilitator to participation in the life of the state.

One of the most powerful ways of creating a shared national linguistic identity is by ensuring that the country's official language is used as the MOI for teaching and learning in every classroom. However, not all MOI policies are like this. Some support the use of other languages for teaching and learning. In some countries languages spoken in the local community are used for teaching young children and in others it is possible for a child to go through their state-schooling without ever using the country's official language as their MOI. In yet others, the country's official language is replaced in the classroom by a high-status international

language, such as English, for certain subjects. My study is designed to explore and analyse those patterns.

The choice of MOI policy for a state-school system is a political decisions, with languages acting as proxies for the interests of different social groups (Kymlicka & Grin, 2003, p. 11). Debate and disagreements over MOI choices can be interpreted as representing a struggle for control over the politically and economically important domain of education by different social groups (Tollefson, 2013, p. 3). Thus languages have more than just their instrumental value as a tool for communication. They also have the potential to act, or be seen to act, as markers of cultural and social identity and to control access to power and resources (Robichaud & De Schutter, 2012; Romaine, 2000; Wright, 2004). For reasons of practicality if nothing else, modern states cannot take a stance of being completely disinterested in the language, or languages, which are used for communication in the public arena or for providing public services (Backhaus, 2012). Some pattern of language use will be established, whether by law or by convention, for all state-regulated formal domains – and this includes state education systems.

Haarmann suggests that language planning can be *"understood as a form of conflict management"* where decisions on language use in formal domains are decided by policy makers taking into account the needs and desires of speakers of different languages (including themselves), whilst considering the limitations and opportunities afforded by different policy choices (Haarmann, 1990, p. 123). When a state education system is understood as a tool for governments to define and reproduce the characteristics of formal national identity, then its medium of instruction policy can be seen as contributing to the development and strengthening of state language policies – it is a form of linguistic state-building (Bourdieu & Passeron, 1977). Whilst the government of a country may have the power to decide the language-in-education policy for its school system, this decision is made within a socio-political context where a host of factors both linguistic and non-linguistic can influence both the MOI policy-making and policy-implementation processes (R. L. Cooper, 1989, p. 163; Kymlicka & Grin, 2003, p. 19; Spolsky, 2004, pp. 6, 217–219). These factors include the global language policy environment - which has changed during the period covered by my study.

1.2 Linguistic Markets

In this study I use Bourdieu's concept of national linguistic markets to capture the interactions of the MOI policy and linguistic state-building ambitions of state administrations with established patterns of language usage within the state itself, and also with influences on language-in-education practice external to the state. Bourdieu developed the concept of a linguistic market to explain the mechanisms through which linguistic capitals (as a particular embodied form of cultural capital) become judged as being of high or low value within a particular field, or "market" (Bourdieu, 1992b). As part of this, state education systems work to create and reproduce the social conditions most favourable to ensuring that the linguistic capitals of the dominant group have a high status and are perceived as the "legitimate" language variety (Bourdieu, 1990, Chapter 8). Such an ambition does not exclude the use of other languages as MOI, provided that doing so does not lower the overall linguistic capital of the dominant group within the linguistic market.

I was drawn to using the linguistic market concept to provide the theoretical structure for my work because, as with all of Bourdieu's "thinking tools", an understanding of the impact and reproduction of existing models of social organization is central to their use (Bourdieu & Wacquant, 1992, pp. 158–160). Although new states, none of the cases are blank slates. At independence they all inherited national linguistic markets which had been established by their pre-independence powers. I explore how, over time, MOI policies are used by governments to maintain or to change these inherited patterns of language status and usage.

Whilst all the actors within a state's linguistic market have a vested interest in gaining the best possible advantage for their own linguistic capitals, the choices they make and actions they take will not have an equal impact on the structure of the market. Actors (whether thought of as individuals or institutions) are most able to influence the state's linguistic market if they are close to the field of power. The field of power is defined as "*a set of partially overlapping bureaucratic fields",* shaped by forces from both the public and private sector, which have a strong influence over the structure of all other fields within the state (Bourdieu & Wacquant, 1992, pp. 113–115). The legislation for regulating language use in

education systems, in particular policies for languages which can be used as MOI, acts as a key mechanism for establishing a coercive norm of language use in formal domains. The more firmly established the necessity of obtaining formal educational qualifications through the state education system (to access positions of power or opportunity) is, the greater the influence of MOI policy on a state's linguistic market will be (Blommaert, 2014, p. 4). However, state-school MOI policy will only be successful in regulating language use in formal domains if "ordinary players" accept the rules of the game by participating in the state's education system.

In *"The Production and Reproduction of Legitimate Language"* (1992), Bourdieu used the linguistic market concept to explore the evolution of contemporary attitudes towards the use of different languages and language varieties in France and to understand the social mechanisms which ensured the continued dominance of standard French within France's linguistic market. In his discussion of the conditions necessary for the establishment of a state's official language as the dominant language of a national linguistic market, Bourdieu mentions, but does not elaborate on, the potential for factors external to the state to impede the implementation of a government's linguistic state-building policy. Taking inspiration from Blommaert's ethnographic studies of the mobility of linguistic capital (2010) I expand the concept of the linguistic market from being focused on the interactions of language status and usage within one specific country, to considering how the many individual national linguistic markets interact with one another to form a wider international linguistic market. All the languages which compete for status within a particular internal national linguistic market also have a (potentially different) status relative to one another within the external international linguistic market. By considering a particular language's status within the international linguistic market relative to that of a country's official language, I can develop a better explanation for why that language may, or may not, be used as an MOI within that country's education system.

1.3 Research Questions

I have developed this concept of national linguistic markets interacting with one another within a wider, external, international linguistic market to answer two research questions:

1. What strategies of MOI policy have been adopted by the governments of new states across primary and secondary schooling and how have these changed over time?
2. **Can** the patterns identified be explained using the concept of national and international linguistic markets?

The first question allows me to explore the MOI policies adopted over time in new states as part of a linguistic state-building project. From this I identify four broad strategies for managing language use in schools. In chapters 6, 7, and 8 I use qualitative comparative analysis (QCA) to structure an analysis of *why* countries made the MOI policies that they did. The second question allows me to extend Bourdieu's concept of the national linguistic market by using it to examine a number of countries across time. I argue that, by taking the perspective that national linguistic markets interact with one another to form a wider, international linguistic market, it is possible to gain a clearer understanding of how factors external to the state can influence MOI policy choice.

1.4 Setting the context

I gave structure to this study by focusing on new states, created since the end of World War Two and exploring how their MOI policies developed through the second half of the Twentieth Century and into the early Twenty-first Century. I used scope conditions to make a purposeful selection of 42 cases with a wide range of dates of independence and pre-independence histories whose MOI policies I could investigate.

Globally, formal schooling systems have existed in many countries for hundreds of years and the languages used within them shaped, and were shaped by, the linguistic markets of these countries. However, access to these education systems, particularly for more than basic literacy education, was often highly restricted. It was only in the second half of the Twentieth Century that state provision of mass education has become the internationally expected (if not attained) norm. The end of the Second World War saw the formation of the United Nations and, as many of the European empires were dismantled, a world-wide commitment to projects of equality and modernisation emerged (including

commitments to mass-education provision) (Shapiro & Lampert, 2014, pp. 14–45).

With my interest in the role of mass state-education systems as a tool for state-building, I chose to focus on MOI policies used in primary and secondary schooling as these are the levels of education encountered by the majority of a state's population. I analysed school MOI policy choices not only to better understand their role as tools for linguistic state-building, but also because they can have an impact on educational performance and subsequent access to social and economic opportunity. Whilst education policies do not directly determine classroom practice (GEM Report, 2020c), they form an influential part of the framework within which classroom practice occurs (Bourdieu, 1990, p. 108). The ability of students to access and benefit from the state education system is significantly affected by their command of the languages through which their education is delivered (McGroarty, 2002, p. 17). Since the 1990s much of the language policy and planning (LPP) literature has critiqued the role of language policy in creating and reproducing social inequality and in the Twenty-first Century supranational bodies involved in education, such as UNESCO and the EU, have given non-binding recommendations on school language policy which also reflect these concerns. In this thesis I examined whether these recommendations, which are concerned with the use of both high and low status community languages within schools, have influenced the recent MOI policies of new states.

1.5 Research strategy

This is a desk-based study. I collected case data from a range of modern and historical written sources. To process and make inferences from the large quantity of textual data which I drew on, I used the analytical power of Ragin's qualitative comparative analysis (QCA) methodology (Ragin, 2014) to analyse my data. Whilst qualitative comparative analysis has become a mainstream method of making large-scale case-based analyses within the fields of political science and sociology, it is little used within other fields, including educational research (Rihoux et al., 2013).   The QCA approach provides a way of representing the complexity of the case data with truth tables and uses Boolean algebra to reduce this complexity by distinguishing between irrelevant and meaningful variation within the data (Ragin, 2014, pp. 93–95).

A weakness of QCA methodology is that, whilst it is an efficient and flexible tool for cross-sectional data analysis, it does not deal easily with notions of time (Schneider & Wagemann, 2012, sec. 10.3). In this thesis I demonstrate how, by carrying out multiple waves of longitudinal analysis, QCA can be used successfully to identify patterns of MOI policy change over time in education systems. This is a strategy for investigating patterns of policy change which has been suggested within the QCA methodological literature but not yet used within a comparative education study (Verweij & Vis, 2021).

My study is aligned with the macro-causal tradition of comparative research (Ragin, 2014, pp. 6,9-12) which explores the social world by generalizing across selected cases. To explore the extent to which my assumption that a common linguistic state-building agenda drives all school MOI policies, I felt that it was necessary to take a global perspective – comparing the MOI policies of many different countries from around the world (Schweisfurth, 2013). By adopting a comparative sociological perspective and taking a "bird's-eye view" across many cases I hoped to identify broad patterns in how states use MOI policies to protect and develop the status of their official languages within their national linguistic markets, each of which forms part of (and is influenced by) the wider external international linguistic market; and to identify evidence for state MOI policies changing over time either in response to global promoted models of educational best-practice, or by increasing demand for internationally marketable language skills. Any knowledge generated from this bird's eye view of MOI choice and change is not just of theoretical interest. By understanding the broad forces which drive the acceptance or rejection by governments of the use of particular types of languages in school, advocates for MOI change will be in a stronger position to lobby for change.

Comparative studies of state language policies and their impact on language-in-education policy are not new (Laitin, 1979; Myers Scotton, 1981). However, existing comparative studies of language policy tend to focus on one particular geographical region (Kirkpatrick & Liddicoat, 2017; Watson, 1980) (Coulby, 1997; Hogan-Brun et al., 2008) or form part of the growing Twenty-first Century trend of standardized international comparisons of education system performance, assessing the relationship between current language-in-education

policies and pupil performance (OECD, 2016; Trudell, 2016). I review this literature in the next chapter and describe how my desk-based strategy of synthesising existing detailed research on the MOI policies of individual countries makes a novel contribution to the literature by providing a global perspective on longitudinal changes to the use of school language policy as a tool for state-building by newly-formed states.

1.6 Significance

One significant output from my thesis was the development of an approach, using QCA truth tables, for categorizing and comparing MOI policies according to the amount of language choice they allow. I identified four MOI types, or models. The advantage of this model of four MOI policy types is that, unlike existing models which focus on just one aspect of MOI (such as the use of English or home languages), this model groups countries according to how their overall MOI policy - across both primary and secondary school – supports the development and maintenance of the national linguistic market by regulating the use of non-state languages.

This approach emerged from my case data analysis as a way of conceptualizing how states manage the use of other languages, in addition to the official language(s) within schools as part of an overall strategy of linguistic state-building. Applying this approach to my case data led to me identifying four distinctive MOI strategies. The first two strategies, Purist (only the state language(s) are used as MOI) and Pragmatic (community languages are also used as MOI in early primary schooling) both support linguistic state-building by allowing only the state-language to be used as MOI in the higher-status domain of secondary schooling. In my analysis I consider how movement between these two strategies has been influenced by calls for more equitable access to education associated with the Education for All (EFA) movement and by factors associated with globalisation. The third strategy, Accommodating (high status community languages are also used as MOI in secondary school), was seen most in the new Eurasian states. At independence the populations of these states had high levels of literacy, and community groups were accustomed to having a choice in which language they used to access both primary and secondary schooling – with many of these additional languages being used as national

languages in other countries. In my analysis I interpret decisions to maintain or restrict this Accommodating MOI policy type by evaluating whether the presence of these additional languages was perceived as threatening the effective establishment of the preferred linguistic market of the new state's government. Finally, overlaying the first three types, I identified a fourth strategy, Opportunistic (new, high status, languages are introduced as MOI), which has become more common in the Twenty-first Century, reflecting the increased demand for knowledge of high-status international languages (such as English) brought about by factors associated with globalisation.

1.7 Thesis structure

In Chapter 2 I introduce the concept of linguistic state building and Bourdieu's model of the linguistic market. I discuss the powerful role that language-in-education policy, particularly the choice of medium of instruction (MOI) can have in shaping or maintaining national linguistic markets. I then introduce a wider, global, perspective for understanding these issues of national language policy, showing how forces external to the state can influence national MOI policy choices. Together, these concepts form the theoretical framework for my study, which takes a global and longitudinal perspective to analysing MOI policy change. In the final parts of this chapter I review the current literature on comparing MOI policy choice and identify how the distinctive qualities of my study will contribute to this literature.

In Chapter 3 I introduce qualitative comparative analysis (QCA), the methodological approach which I use to structure the analysis and explain how I adapted it to facilitate the longitudinal comparison of my data from many states. In Chapter 4 I describe the first parts of the QCA process – selecting cases and collecting data on them. I justify my choice of scope conditions used to purposefully select cases, and discuss my data collection strategy. I then give an overview of the school systems and linguistic markets that were present in the cases before independence. I identify commonalities in MOI policies across different regions and colonial powers and identify five distinct types of pre-independence MOI policy strategy. I used these to inform my subsequent analysis of post-independence MOI policy choices.

In Chapter 5 I show how I answered the first research question of this study, *"What strategies of MOI policy have been adopted by the governments of new states across primary and secondary schooling and how have these changed over time?"* I discuss how I used case data, exemplars of MOI typologies from the literature, and theoretical knowledge to identify and define a novel model of four distinct types of MOI policy strategy - Purist, Pragmatic, Accommodating, and Opportunistic - which describe a state's primary and secondary school MOI policies in terms of their overall language policy aim. I then present the calibrated data on MOI policy choice and show how each state's MOI policy has changed over time.

In the three chapters that follow I use longitudinal QCA and case data to answer my second research question, *"Can the patterns identified be explained using the concept of national and international linguistic markets?"* In Chapter 6 I compare patterns of MOI policy shift in cases which do not allow any choice of language of instruction in secondary school. These states use their MOI policies to support the creation and maintenance of homogeneous patterns of language use in formal domains using two MOI strategies: Purist, where only the official state language(s) is used as MOI throughout primary and secondary education; and Pragmatic, where some choice of MOI is supported in primary school. I identify four significant ways in which these Purist and Pragmatic MOI strategies are altered to support linguistic state building: a "softening" of traditionally Purist MOI policies; Purist strategies which use "dual language" MOIs, i.e. teaching using both a national and an international language; debates over whether Pragmatic MOI policies "help or hinder" the acquisition of international languages; and states which experienced "violent transitions" to independence using their MOI policies to create a new national linguistic identity. I discuss how all these strategies had the common goal of using primary school MOI to promote the acquisition of a country's official language(s) and thus maintain the official language(s) as the dominant language within the country's linguistic market.

In Chapter 7 I discuss "Accommodating" MOI policies which allow the use of more than one language in the high-status domain of secondary education. This situation is associated with a national linguistic market in which two or more languages are accepted (either as a result of legislation, or through established

patterns of usage) for use in high-level fields, including education. In such a situation the dominant legal status of the official language may not be matched by its actual value within the national linguistic market, and this could lead to education through non-state languages being preferred by parents for their children – thus weakening the status of the official language. Often, the additional languages in Accommodating MOI policies are those used by established minority groups that have an associated external kin-state – that is, the language has official status in at least one other country. I use the concept of linguistic state-building to explore why some states maintain Accommodating MOI policies, whilst others adopt policies which restrict the amount of MOI choice available at the secondary school level. In Chapter 8 I discuss a distinct sub-set of the Accommodating MOI strategy which involves the introduction of additional high status languages that may be chosen to be used as MOI in secondary schools – a strategy which I refer to as "Opportunistic". The Opportunistic MOI type refers to those language-in-education policies which have crossed the divide between teaching an economically useful language as a subject and using it as a medium of instruction – in addition to, or instead of the dominant language of state.

Finally, in Chapter 9 I summarise and evaluate my findings and make suggestions for further research.

2 Literature review: MOI policy and the linguistic market

In this chapter I introduce the concept of linguistic state-building and Bourdieu's model of the linguistic market. I discuss the powerful role that language-in-education policy, particularly the choice of medium of instruction (MOI) can have in shaping or maintaining the national linguistic markets of independent states. I then introduce a wider, global, perspective for understanding these issues of national language policy, showing how forces external to the state can influence national MOI policy choices. Together, these concepts form the theoretical framework for this study which has a global and longitudinal perspective. In the final parts of this chapter I review the current literature on comparing MOI policy choice and identify how the distinctive qualities of this study will contribute to this literature.

2.1 The meme of linguistic state-building

After attaining independence, the new states in this study embarked, to differing degrees, on programmes of state-building – defining their new, independent, national identity and creating a shared sense of national identity for their citizens. The sentiment of national identity has been described as *"a state of mind corresponding to a political fact"* (Kohn, 1994, pp. 329–331) and modern states use many strategies, including controlling the languages which are used for teaching and learning within state-schools to develop and reinforce this state of mind. The desirability (or even necessity) of a people to share a common language in order to generate a sense of shared national identity has been a component of the doctrine of nationalism since its development during the Romantic Era of Eighteenth and Nineteenth Century Europe (Kedourie, 1966, p. 9).

In the Nineteenth Century it was common to refer to both sovereign states and a group of people united by a sense of a shared history and common traits (including language) as a "nation" (Smelser, 1994). This merging of the socially constructed concept of "the nation" and the politically defined "state" – as seen in the naming of "The United Nations" and the common usage of terms such as

"national curriculum" can create confusion when discussing differences both within and between countries (politically defined states). To make my exploration of medium of instruction policy changes as clear as possible I will avoid using the term "nation" to describe any group of people and will, instead, refer to independent sovereign states as "states" or "countries" and distinct (or self-identifying) sub-sections of the populations of such states as "groups" (whether, minority, majority, ethnic, linguistic, regional, or other). I will use the term "state building" to refer to any activities that have the goal (explicit or implicit) of creating or defining a shared formal identity for a country – whether through practical means (for instance, standardising administration) or through the creation of official symbols (flags, anthems, etc.). Any use I make of the adjective "national" will either be in relation to matters pertaining to the state as a whole, such as a state's "national linguistic market" (to differentiate it from the wider international linguistic market). Or, to reflect official state nomenclature. For example, in Botswana Setswana is the National Language and English is the Official Language (Kedikilwe, 1993, pp. 110–111).

The belief that the sharing of a common language was necessary for establishing a feeling of nationality identity (in the sense of attachment to a politically recognised state) influenced European political thought throughout the Nineteenth Century. Writing in 1861, John Stuart Mill translated the romantic nationalism ideal, that the members of a *nation* should share a common language, into a practical necessity for good governance of *states*. In his opinion the sharing of a common language, with its associated exchange and circulation of ideas and values, was near-indispensable for the creation of a true democracy (Mill, 1971, p. 382). This stance is still promoted today by liberal nationalist theorists such as David Miller and Margaret Canovan (Green et al., 2006, Chapter 4) and it continues to have a significant influence on language-in-education policies (G. Ferguson, 2006, pp. 65–67).

This belief in the need for a shared language to create a sense of common national identity is an example of an ideology, *"a frame of reference so natural that it is neither observed nor commented upon"* (Blommaert, 2005, Chapter 7) or orientation determining *"what is thinkable about language in society"* (Ruiz, 1984). This long-lasting *"intimate and fateful link between language and politics"*

(Kedourie, 1966, pp. 60–61) has been justified by states in many different ways (Fishman, 1971, pp. 43–44; Smith, 1995, pp. 112–115). It has influenced the linguistic policy making actions of countries (such as France) which ascribed to the concept of civic nationalism and see themselves as a nation through an effort of will, and those (such as Germany) which followed a doctrine of ethnic nationalism and consider themselves to be a distinct and naturally separate division of the human race. Whilst the French and German models of citizenship are ascribed to models of nationalism with very different philosophical origins (for a discussion, see Brubaker (1992) or Hobsbawm (1992, pp. 21–22)) they have had, for the majority of their modern history, the same official policy towards language use – unilingualism in formal state-controlled domains.

This link between language and the politics of state-building is amplified by increased literacy levels and improvements to travel and communication. In Europe these phenomena are linked to the Industrial Revolution – which was contemporary to the evolution of the concept of nationalism - and are integral to many Twentieth Century discussions of the role played by language in state-building. Within this literature the discussion of the link between national consciousness (a spontaneous, bottom-up, primordial sense of togetherness and belonging) and state-building (the top-down, creation of a social system which supports the functioning of the political state) can be categorised as a "chicken and egg" debate. Most parties agree that, in a successful modern state, the two phenomena are linked but there is disagreement over which is the cause, and which is the effect (Smith, 1995, p. 126). Anderson describes nations as *"imagined communities"* – a group of people who believe that they share common ideas, standards and values with the other members of the group, despite having met only a tiny fraction of the other members of the group (Anderson, 1991, pp. 5–7). He attributes the emergence of this national consciousness in a large part to the technological development of printed media and the role that this played in allowing the sharing of ideas across space, time, and differences of dialect. This idea echoes Mill's assertion that a common language is necessary for the government of a modern free state to function effectively. This informal, bottom-up process of written language sharing was magnified by the mass movement of labour and increased levels of literacy caused by industrialisation. It was, and still is, also open to being steered by government language policies (Anderson,

1991, pp. 43–45). Hobsbawm is in agreement with Anderson over the necessary role that the print media and mass literacy play in the creation of shared senses of national identity. However, he gives greater attention to the actions of policy makers in shaping and directing these shared linguistic identities, advising that, *"Nations and their associated phenomena must therefore be analysed in terms of political, technical, administrative, economic and other conditions and requirements"* (E. J. Hobsbawm, 1992, p. 10).

Gellner argues that the need to produce interchangeable workers was the prime motivator for the development of state-regulated, standardised mass-education; and that a by-product of this process was the creation of citizens with very similar world-views and cultural reference points – including familiarity with a common language – thus creating a group of people with a strong national identity (Gellner, 1983, pp. 39–52). The process, as described by Anderson and Gellner, of developing a shared identity, created and spread through literacy in a shared language, produces what are defined by Kymlicka as *"societal cultures"*, having common institutions and practices as well as shared memories and values. In common with Gellner and Anderson, Kymlicka holds that the creation of such *"societal cultures"* is tied to processes of modernization; with the development of standardised state institutions, particularly education systems, contributing to *"the diffusion throughout a society of a common culture, including a standardized language"* (Kymlicka, 1995, pp. 76–77).

Writing at the beginning of the Twenty-first Century, Brown typifies the explanations of writers such as Anderson and Gellner for the development of modern centralised states, and the sense of national identity (or belonging) associated with them, as being situationalist (also referred to as circumstantialist, or instrumentalist) and turning on *"the liberal assumption that individuals seek in general to promote their freedom, self-fulfilment or self-realisation"* (D. Brown, 2000, pp. 13–14). In other words, it is advantageous for individual citizens to adopt the civic culture and national language of the state because it will result in them having a better quality of life. Brown argues that whilst situationalism gives a convincing explanation for the development, acceptance, and success of the nation-state model in Europe in the Nineteenth Century (the type of argument used by Mill to justify the assimilation of minority groups into dominant cultures

(1971, p. 385)), it is less useful for explaining the rise of ethno-nationalist sentiment in the late Twentieth and early Twenty-first Century because the resulting disintegration of states along ethnic lines is not always associated with a rise in prosperity and material advantage (D. Brown, 2000, pp. 25–28). Instead, Brown offers a constructivist approach, nationalism as an ideology, for explaining why a citizen might identify primarily as a member of a nation. The constructivist concept of nationalism sees an individual's sense of identity being influenced by the institutional arrangements which they inhabit, and that nationalism is, *"one of several psychological mechanisms which individuals employ to provide simple formulas for looking at themselves in relation to others"* (D. Brown, 2000, pp. 20–29). This concept of nationalism sees national identity as being constructed by state élites through the selective use of history and symbols (including language) and it being accepted and reproduced by citizens for as long as it is considered to be either true for them or accessible and attainable (Bourdieu, 1992a, pp. 166–167). The emergence of ethno-nationalist separatism can then be explained in terms of the official, élite constructed, national identity not fulfilling these conditions for members of a non-dominant group within the country.

Widespread acceptance of the link between national development and a shared national linguistic identity shaped the post-war language planning environment and its influence can be seen in the language planning decisions made at that time – guiding and providing the internal logic to the decision-making process (Pool, 1972, p. 213; Ricento, 2006, p. 14). The commonality of the perception that having only one language used in the public domain was not only necessary for economic development but essential for national unity was also reported in publications which the United Nations commissioned at that time (Capotorti, 1979, p. 39). Whilst the evidence for the economic justification of discouraging language diversity has been brought into question by more thoughtful analysis of available data, the belief in the economic benefits of striving for linguistic homogeneity within formal domains remains strong (Arcand & Grin, 2013; Nettle, 2000), as does a belief that competence in the language-of-state is essential for true citizenship. When MOI policies are made, reference is frequently made to concepts which link use of a language-of-state (a language with official status) with models of ideal citizenship and the reinforcement of an independent state identity. A particularly strong example of this was the MOI changes made in the

Baltic states after independence which simultaneously raised the formal status of the titular languages whilst removing any special formal status from the dominant language of the colonial era, Russian (Hogan-Brun et al., 2008).

There remains an ideological tradition of policy making for linguistic state-building which sees the adoption, promotion, and maintenance, of a common language as essential for creating a stable and unified society. In consequence, decisions made to shape the MOI policy for a state-school system may have more to do with creating or preserving (an image of) national linguistic identity than with rolling out a practical strategy for developing the language skills of young citizens (Kymlicka & Grin, 2003, p. 25). This enduring belief in the causal link between use of a shared language and citizenship (Cassels Johnson, 2013, pp. 231–232) seems to be so strongly entrenched that it can be classified as a meme. Richard Dawkins coined the term meme to describe the enduring power of cultural norms or ideas which are passed from one group of people to another in a manner analogous to the transmission of genetic traits by genes (Dawkins, 1976, Chapter 11). My case data suggests that acceptance of this meme was the norm amongst the new élites of many countries. The belief in the correlation between using a shared language and sharing a sense of national identity (affiliation with the state) is a lens through which policy makers can make and justify language policy decisions. These language policy decisions then serve as exemplars for future policy decisions – they become a meme. I explore whether the logic of linguistic state-building alone can be used to explain MOI policy choice for state-school systems of states established in the second half of the Twentieth Century, or if there are other forces acting on MOI policy choice.

2.2 Linguistic state-building, the linguistic market and national education systems

The dominant language through which a state functions, and the speakers of that language, have a privileged position within that state. This ideological view of one language being superior to another, which is reinforced when a language-of-state provides access to positions of social and economic advantage, is illustrated by this extract from the National Curriculum for England, which sets out in stark terms the fate which awaits a person who does not master the language of the

state: *"English has a pre-eminent place in education and in society. . . All the skills of language are essential to participating fully as a member of society; pupils, therefore, who do not learn to speak, read and write fluently and confidently are effectively disenfranchised."* (Department for Education, 2014, p. 14)*.* In other words, whilst it may be possible to hold British citizenship and not speak English, it is not possible to participate fully in civic life in England without a strong command of the English language.   This is an example of the transactional advantage (both real and perceived) that mastery and use of a state's official language gives to its speakers.

In my analysis I draw on and extend Bourdieu's concepts of linguistic capital and the linguistic market as a framework for exploring MOI policy choices made for state-education systems. Bourdieu held that the position of a person within any given field, the status that they hold, and the opportunities open to them, is dependent upon the types and amounts of capitals which they possess. He described three fundamental types of capital – economic (material wealth), cultural (knowledge and skills), and social (prestige and status). Each type of capital is transformable (with effort) into the other forms (Bourdieu, 1986, p. 47). The languages which a person has command over constitute a particular form of embodied cultural capital – linguistic capital.

Bourdieu held that a government's linguistic state-building policy will be successful when linguistic capital in the form of knowledge of, and use of, the official language(s) of that country was recognised as being necessary (but by no means sufficient) for gaining access to status and success by participating within the formal, state-controlled fields of that country (Jenkins, 2014, Chapter 7). Using the official language as the MOI for the state's education system can raise, or maintain, the status of the official language because access to institutionalized capital in the form of formal educational qualifications (potentially convertible into economic and social capital) then becomes dependent upon knowledge and use of the official language (Bourdieu, 1986, pp. 50–51). This approach to raising and maintaining the status of the official language is effective provided that the country's economic and social circumstances support the links between knowledge of the official language, gaining educational qualifications, and

accessing opportunity within high-status fields. The more developed an economy is, the stronger these links are likely to be (Wacquant, 1993a, 1993b).

This does not mean that everyone has to benefit from these links, it is sufficient for them be commonly acknowledged as being present. So using the language-of-state as the MOI in schools can work as a linguistic state-building strategy even if only a small proportion of the population actually benefits from participating in the education system (Bourdieu & Passeron, 1977, p. 40). The approach will be less effective if access to similar (or better) opportunities is available without the necessity of having a strong command of the official language.

The process of linguistic state-building encompasses all activities which are intended to increase the unquestioning acceptance and use of a state's official language(s), particularly (but not exclusively) in formal, state-controlled domains. State-education systems can play a key role in this process, not only by teaching the language (acquisition planning) but also by making access to educational qualifications (which can control access to employment) contingent upon having a strong command of the official language (status planning). Whether justified by claims of enabling administrative efficiency or of strengthening social ties, choosing an official language and using it as the MOI for a state-education system, creates the conditions for establishing a linguistic market in which the official language has the highest status (Bourdieu, 1992b, pp. 48–9).

For Bourdieu a market, or field is "*a social arena within which struggles or manoeuvres take place over specific resources or stakes and access to them*" (Jenkins, 2014, pp. 84–91). Fields are interrelated and actions and relationships in one field can affect the value attributed to capitals in another (Bourdieu and Wacquant, 1992, chaps 94–114). In *The Production and Reproduction of Legitimate Language* Bourdieu uses the concept of the *linguistic market* to explore the interlinked and self-reinforcing nature of the status of a state's official language, its use in state institutions, the opportunities available to those with knowledge of it, and the creation of the state itself (Bourdieu, 1992b, p. 45).

Bourdieu describes all languages within a national linguistic market other than the dominant, normalized, state-language as *threatened linguistic capital* (Bourdieu, 1992b, p. 58) as their use is not supported (and possibly even discouraged) within the public sector. Using a non-dominant language or, more critically, not being able to use the dominant language, puts a speaker in a weaker position in any transactions within the more public social fields - social and economic interactions being no respecters of a language's intrinsic value. This is why supporters of the rights of users of non-dominant language may call for governments to implement language policy legislation which will alter the way in which the linguistic market functions. Alternatively, the government itself may choose to implement legislation in an attempt to manipulate the national linguistic market if the status of the language-of-state is perceived as being threatened by the presence and use of another powerful language either within its own, national, linguistic market, or in the wider international linguistic market.

Legislation alone is not sufficient to change a language's status. An official language only achieves the dominant position within a state's linguistic market when it is accepted by all members of the society – whether or not they speak it themselves – as *"the only legitimate one"* (Bourdieu, 1992b, p. 46). Bourdieu's concept of the linguistic market draws attention to the fact that, whilst a functioning state system is necessary for the emergence of a truly dominant state language, the use of the state language in public domains acts to reinforce the power and prestige of the state. It is a positive feedback system and works by creating a *"linguistic community"* in which every person, regardless of the way in which they use language, sees the state language as being of greatest intrinsic value because it brings the greatest extrinsic rewards. This agreement lowers the relative status (and, in consequence, the utility) of all other language varieties. Which, in turn, influences the choices which families make for the languages which their children will learn and be educated through (Bourdieu, 1992b, p. 47; R. L. Cooper, 1989, p. 135).

In a modern state, where literacy is a prerequisite for all but the most menial of employment, the state's education system can be a powerful regulator of its linguistic market, reinforcing the status and utility of the state's official language and ensuring the transmission of it as legitimate culture by playing a key role in

creating the social conditions which are conducive to it being valued and sought-after (Bourdieu, 1992b, p. 46; Bourdieu & Passeron, 1977, p. 32). However, as I will show in my analysis, complications can occur when an alternative educational route, through a language other than the language of state, is also available to citizens.

Status planning – which regulates the roles (both practical and symbolic) that languages play - can influence both the utility of a language and how it is valued. The intrinsic worth of a language, both to speakers and non-speakers of the language, is influenced by its usefulness or instrumental value. This instrumental value can be manipulated through controlling the public domains in which it can be effectively used. The more domains, and the more prestigious the domains, in which a language can be used, the more prestigious the language becomes (D. Ager, 2005, p. 35; Reaume, 2000, pp. 251–252). But legislation permitting (or, indeed, forbidding) the use of a particular language in a particular situation is not enough, in itself, to change the prestige of that language and thus encourage (or discourage) its use. This will only happen when the advantages of complying with a language policy significantly outweigh any efforts or losses associated with doing so (Bourdieu, 1990, p. 108). The years of language planning activities directed towards promoting the use, and protecting the status, of the national language, bahasa Malay, in Malaysia against English is a case in point (D. Ager, 2005, pp. 13–14).

Many European states which achieved their modern form during the Nineteenth Century saw the establishment and standardisation of state-education systems as a vital component of their nation-building process. Not only to produce a skilled workforce, but also *"to spread dominant national cultures and inculcate popular ideas of nationhood"* – including popularising the use of the language-of-state (Green, 2013, p. 298). The establishment by a state of a mass-education system, even when accompanied by legislation to enforce compulsory attendance, did not by any means automatically result in the effective inculcation of a standard model of national identity in its citizens (Brockliss & Sheldon, 2012). However, it can be inferred, from increased enrollment rates, that these early mass-education systems did increase the proportion of the population that had at least some exposure to opportunities to learn the language-of-state.

France is often considered the classic example of how one visible aspect of a standardised civic national identity, the recognition and use of a common language, can be created and spread through a centralised state-education system and other state-wide institutions, working together to create the conditions for a country-wide linguistic market in which the highest levels of linguistic capital are possessed by those who have competence in the language-of-state. Despite French being the official language of France since 1539 (Weber, 1976, p. 70) and primary education in French being both free and compulsory from 1882 (Green, 2013, p. 15) *"it was only when what the schools taught made sense that they became important to those they had to teach"* (Weber, 1976, p. 303). Schooling was only truly valued by students and their families, and seen as worth investing in, when educational success became seen as a firm pathway to social and economic opportunity. This was the point when France's education system and its official language gained their full power and legitimacy (Bourdieu, 1990, pp. 67–68).

Language-in-education policies are a particularly powerful tool for linguistic state-building because they impact on the lives of nearly all of the people living in a country. Most permanent residents will have extended contact with the state-education system either directly as a student or indirectly through their children. In addition, qualifications obtained through the state-education system facilitate access to further education and the job market. Language qualifications can also, as is the case in Estonia, be a requirement for being granted citizenship (Berg & van Meurs, 2002, p. 58). However, as was the case in France, on their own language policies transmitted through education systems will not have a strong impact on linguistic repertoires used outside of school unless they are supported by other social changes, such as access to the national job-market or increased opportunities for mobility within the country, which make having command of the national language an advantage. MOI policies are not created in isolation. They are usually part of a state-wide system of language legislation which, in turn, is determined by a wider set of policy goals for society which could include areas as diverse as economic development and citizenship (D. Ager, 2005, p. 35; R. L. Cooper, 1989, p. 182). They are driven by political events and social processes as much as by pedagogical considerations. School language policies can be used in conjunction with language policies in other domains to support a *"hidden*

curriculum" to either change or maintain the distribution of power and status between different linguistic groups (McGroarty, 2002, pp. 21–23).

Deliberate regulation of language use takes place at all levels of society, from the micro-level of personal interactions (an adult correcting a child's speech) through to the macro-level of state legislation (Nekvapil, 2006, p. 100). An individual's language acquisition and use choices can be driven by factors other than educational or economic utility, including religious and ethnic identity (Tsui et al., 2017). Without losing sight of the influence that language-in-use beliefs and practices at the micro-level can have on the macro-level (and vice versa), I am concentrating on the macro-level activities of government policy makers. Every state government and governmental institution has a language policy. These policies range from the deliberate and codified, through to the unquestioned habits of established usage. State-education systems do not just prepare students for employment, they also socialise them to become citizens in a state which is part of the wider world (Ó Riagáin & Lüdi, 2003, p. 7). School language policies, which include languages taught as subjects as well as those used as MOI, need to be interpreted in the context of these broader policy goals of, not only establishing or maintaining the position of the language-of-state as the dominant language of the national linguistic market, but also of managing (or taking advantage of) the position of the national language within the wider international linguistic market relative to other languages (Lambert, 1999).

2.3 How do MOI policies support state LPP activities?

Language-in-education policies are potentially powerful tools for influencing or managing a state's linguistic market in societies where literacy is near-necessary requirement for all but the most menial employment. Education systems tend to value and reproduce the social capitals of the dominant societal group, and this includes their preferred linguistic capitals. By becoming embedded within the education system, the language(s) used as MOI come to be seen as the natural choice, rather than being perceived as the cultural arbitrary that they actually are. This reproduction and transmission of the "rightness" (or not) of using a particular language as an MOI was compared by Bourdieu and Passeron to the biological transmission of genetic material – similar to Dawkin's concept of the "meme" – a form of cultural "natural selection" (Bourdieu & Passeron, 1977, pp. 22-3,32).

Regardless of the orientation, ideology, or linguistic culture driving it, a language-in-education policy will create a distinction between "standard" patterns of language use and the use of any other language type or repertoire, regardless of whether the use of non-dominant languages is accommodated within the educational domain, actively prohibited, or ignored by legislation. Languages with statuses lower than that of the language-of-state will be treated as "marked" cultures and this will have an impact on their status and the status of their users. However, choosing a language to be used as a MOI, particularly in secondary education, is a way raising (or attempting to raise) the status of that language within the linguistic market.

Linguistic state-building: shaping and promoting the use of an official language, is achieved through the education system via three main strategies: corpus planning; status planning; and acquisition planning. The implementation and impact of these strategies are interlinked. If successful, then can alter (or maintain) the linguistic market by changing the utility and function of targeted languages, thus affecting the prestige with which those languages are held (D. Ager, 2005; Hornberger, 2006, p. 29).

2.3.1 Corpus planning

Corpus planning determines the form which a standard "named" language will take. It is a process designed to reduce the diversity present in real-life language usage (Ferguson, 1959). It encompasses setting out rules for spelling and grammar (standardisation); developing a writing system (graphization); and extending the language so that it can be used to discuss and express new concepts (modernization) (C. A. Ferguson, 1968). These, seemingly neutral, linguistic activities can be driven by political forces and language ideologies. Standard languages have been described as *"historical creations"* whose form contains a record of the political and economic conditions which have led to their adoption and spread (Anderson, 1991; R. L. Cooper, 1989, p. 143). Heinz Kloss coined the terms, *Abstandsprache* (Abstand languages) and *Ausbausprache* (Ausbau languages), to distinguish between languages which are different because they have developed separately over time, and those between which differences have been engineered for social or political reasons. However, this distinction should be used with care as many of the dominant world languages

are both Abstand languages and Ausbau languages. They may be separated from other languages by an intrinsic linguistic distance, but they also owe their modern standard forms to a deliberate process of corpus planning (R. L. Cooper, 1989, p. 142; Kloss, 1967).

Corpus planning can be used to integrate communities, or as a tool to create and maintain separation between groups of people. It can be carried out by private organisations, a colonial power, or the élites or proto-élites of independent states (Rensch, 1977). For the cases included in this study, the languages used within their education systems have been subject to corpus planning both before and after independence; with post-independence corpus planning reacting to the inherited pre-independence linguistic landscape. Post-independence language modernization activities can be driven by notions of "language purity" which relate closely to concepts of preserving and strengthening national identity. Fishman described the desire to remove unwanted foreign influences from an official language as a process of *"external separation and internal consolidation"* which mirrored state-building activities in other areas of nationalist state-policy (Fishman, 1972, pp. 66–67). Official corpus planning leads to the creation of standardised versions of official languages – and it is these which are sanctioned, through status planning, for use in state-controlled formal domains, including state-school systems (Reagan, 2018).

These "standard" or "named" varieties of languages referred to in MOI policies ("French", "English", "bahasa Indonesia") are artificial concepts which do not reflect real-life language practices or linguistic repertoires. They are political constructs (what Bourdieu calls "*cultural arbitraries*") chosen to hide the complexities of language usage in real-life and to promote a cohesive model of national linguistic identity (Blommaert, 2005, pp. 215–218). Bourdieu described official languages as *"a system of norms regulating linguistic practice"* (Bourdieu, 1992b, p. 45). However, their artificiality does not mean that they are unimportant. On the contrary, these *"legitimate languages"* act as ideal types against which any language use in formal domains is measured, giving language policy the power to shape societal attitudes towards language use and language users (Blommaert, 2005, pp. 10-11,208).

The socially constructed language ideal-types prescribed for use in higher levels of formal education are usually closely aligned with the language variety used by the dominant group in a state or other community and have become established in their position through complex, often violent and coercive, historical processes (Thompson, 1992, p. 5). This results in educational success being closely linked to the acceptance and reproduction of the specific language variety of the dominant group (Bourdieu, 1990, p. 133; Reagan, 2018; Thompson, 1992, pp. 24–25).

Bourdieu showed in his work that both the attributing of relative value to different linguistic resources within a society, and the distribution of these resources, are driven by a combination of social factors including government policies, long-established institutional norms, and market forces. He held that a state's education system was a key mechanism for reproducing dominant culture, including sustaining the high status of official languages. Blommaert described state-education systems as centring institutions, supplying a set of linguistic norms and values against which any linguistic activities, within its the sphere of influence, are evaluated (Bourdieu and Passeron, 1977; Bourdieu, 1992b; Blommaert, 2005, pp. 76, 167).

Having decided what form (or forms) their official language will have; a government then needs to ensure that this language is used by its population. This is done through a combination of status planning and acquisition planning – which work together to enhance the prestige of the target language.

2.3.2 Status planning

Hobsbawm described linguistic nationalism as being *"essentially about the language of public education and official use"* (Hobsbawm, 1992, p. 96). Kloss was the first sociolinguist to distinguish the process of status planning from that of corpus planning, drawing attention to the political nature of planning for how an official language will be used in the public domain and how this can determine *"its standing alongside other languages or vis-à-vis a national government"* (Hornberger, 2006, p. 28; Kloss, 1969, p. 81). The act of status planning is the making of deliberate decisions about the formal role (if any) that any one particular language will play in state-controlled domains – where it will be used

and what activities it will be used for (Cooper, 1989, p. 99; Hornberger, 2006, p. 29). When questions arise about which language (or languages) should be used for teaching in schools and for examinations, or in the media, or in interactions with public officials, it is status planning decisions which decide the answers (Cassels Johnson, 2013, p. 27).

Status planning involves a combination of symbolic and practical actions. The symbolic part is when specific languages are given a special status using titles such as *official language* or *national language* which tie the language to the official political and cultural identity of the state. The language chosen to be the dominant language-of-state for a new country will usually be the one which, reinforces the position of, and ensures the greatest social benefits to, the new ruling élite (Cooper, 1989, p. 102). Being recognised as having an official status will not automatically give a language and its speakers a higher status, or encourage others to learn and use the target language. In order to manipulate the way in which languages are used in formal state-controlled domains practical measures are needed to reinforce the status of any official language. The nature of any overt status planning activities will depend upon whether they are aimed at preserving or changing the functions and relative prestige of the languages which constitute a state's linguistic market and, consequently, the power and status of those languages' speakers. (Cooper, 1989, pp. 119–120).

François Grin describes government status planning activities as state interventions in the free linguistic market that are made when the free interplay of social and economic forces (both within and between states) lead to patterns of usage and prestige between languages (or language types) that are considered by policy makers to be politically and socially undesirable – a market failure (Grin, 2006, pp. 83–85). Such strategies are particularly evident in the MOI policies of many of the post-1990 Eurasian states (see Chapter 7) which have used their MOI policies as part of a wider status planning policy to introduce (or reintroduce) a new official language and to reduce the official status (and utility) of any languages which may be perceived to threaten the status of the new official language(s).

Regulating which languages may be used for teaching and learning within the state-education system is a powerful status planning strategy as it makes access to the social and economic opportunities that education can provide conditional upon learning and using the official language(s). In general, a language which is used as a MOI for secondary education will have a higher status and a greater prestige value than one that is used only in primary education (Hobsbawm, 1992, p. 118).

2.3.3 Acquisition planning

Acquisition planning activities are used in conjunction with status planning decisions to achieve the overall language policy goals of a state's government. Status planning operates at the macro level – determining and legislating for which language(s) will be used for which functions in the public domain. In contrast, language acquisition planning works at the micro-level – to influence the language repertoires and language use patterns of individual language users. Language acquisition activities are essential for the successful implementation of status planning legislation (Cooper, 1989, p. 160; Hornberger, 2006, p. 28). Language acquisition strategies may have the aim of maintaining, or increasing, the use of a language which is already used within the community, or of introducing additional language skills. In exceptional circumstances they may have the goal of language shift - replacing one language with another within a specific domain. A dramatic example of this is Rwanda's 2008 replacement of French by English as the sole MOI of secondary education (R. L. Cooper, 1989, p. 159; Hornberger, 2006, p. 32; Pearson, 2014, p. 41).

Acquisition planning strategies work to promote the acquisition of target languages by creating, or improving, both opportunities and incentives to learn the target language (Cooper, 1989, pp. 159–160). School language policies are potentially powerful tools for increasing the knowledge and use of a language within a population. Languages may be taught as a subject or used as the language for teaching and learning (MOI) (R. L. Cooper, 1989, p. 159; Myers Scotton, 1981, p. 14; Spolsky, 2004, p. 46). School language policies may target the whole of the school-age population, or focus on a specific group of students. Teaching a target language in school creates a direct opportunity to learn it. Making a language a compulsory component of secondary school leaving

examinations, or a requirement for citizenship, gives an incentive to learn it and raises its status by reinforcing links between the educational field and other high status fields (Bourdieu, 1992b). When a language is introduced as a MOI within a state-school system it creates (not necessarily successfully) both an opportunity and an incentive to learn as students are given extensive exposure to the target language and they need to use it in order to access knowledge in other subjects on the curriculum.

The enduring strength of the meme that the promotion of one shared language for use in formal, government-regulated, domains is an effective state-building practice is reflected in the homogenizing, assimilatory MOI policies of many new states in the Twentieth Century. This "civic" model of linguistic citizenship was seen internationally as desirable in modern states formed after WW2, as it was considered to promote equality through the use of an ethnically neutral form of political identification with the state. In reality, of course, no form of national identity is value neutral and civic national identities tend to reflect, normalize, and legitimize the cultural traditions and language of a country's dominant social group. This leads to inequality as the civic national identity systematically privileges this dominant group as they have a better command of the language used in schools and, consequently, better access to government services and employment (Kymlicka, 1995, pp. 51–52; May, 2001, p. 53).

However, there are states which have adopted multilingual MOI policies that acknowledge, to an extent, the linguistically heterogeneous nature of their population. Some did this as a concession to a highly literate minority group which was accustomed to accessing education through their own language – which may have a higher status within the international linguistic market than the official language-of-state. In these countries traditions of multilingual access to education (particularly at the secondary and tertiary level) established in pre-independence eras influenced and sometimes constrained post-independence MOI policy choices. Other states adopted a multilingual MOI policy as a strategy to increase the effectiveness of basic education by teaching young children through their community languages, which often had a low status within the national linguistic market. Such polices were generally implemented with the expectation that children will transition to using the dominant language-of-state

as their MOI after a few years. In some of these cases demand for access to higher-status languages (whether from policy makers or families of students) led to calls for these multilingual primary MOI policies to be replaced by dominant-language immersion policies (Carrier, 2011; Coleman, 2017; G. Ferguson, 2012, p. 478; McGroarty, 2013, sec. 38).

2.4 State-school MOI policies and the international linguistic market

MOI policy decisions are made within the context of an existing, internal, national linguistic market, with the language-of-state in competition (both as a marker of identity and a tool for socio-economic opportunity) with other languages within this market. Individual national linguistic markets are not closed systems – together they form, and are influenced by, the wider, international, linguistic market. The changing influence of the wider, interconnected, international linguistic market needs to be taken into account when seeking to evaluate the drivers of MOI policy choice (Bereday, 1964; Blommaert, 2005, pp. 218–220; Spolsky, 2004, pp. 219–221).

Globalization has been present to a greater or lesser extent throughout the modern era; with ideas and people, as well as goods and services, circulating between states and influencing official policies. Before the development of widespread public education, this cosmopolitan influence was characteristic of the lives and education of the élite and its impact, if any, on the rank and file population was indirect. Ideas and knowledge were seen as universals – held in common by the educated élite, rather than being rooted in the culture of one particular state – and learning often had its own language. An example of this is the use of first Latin, and then German, as the shared language of high culture and power throughout the Hapsburg empire, regardless of the language spoken by the majority of the population in any one particular part of the empire (Neustupný & Nekvapil, 2003, pp. 194–195). The colonial-era education systems of the European empires of the Nineteenth and early-Twentieth Centuries continued this pattern of imposing educational norms of non-indigenous origin upon the populations of their colonies. These systems were highly stratified, with access to more prestigious levels of education generally only available through

the language of the colonial power. This resulted in a cosmopolitan educational experience for the indigenous élite, with the future leaders of many independent post-colonial states studying in Europe or the USA – thus strengthening the status of colonial languages as tools for obtaining status and opportunity.

The late-Twentieth Century manifestation of globalization has a greater and more direct influence on all members of society due to what Anthony Giddens calls *"time-space distanciation"* – a shortening of the effective distance between places and events (due to improvements in travel and communication technology) and a corresponding increase in the potiential to influence one another at a distance which creates a network of influences (Giddens, 1991, p. 65).   Hobsbawm observed that, due to this *"between 1914 and the early 1990s the globe has become far more of a single operational unit"* (1995, p. 15) and this has implications for the MOI policy choices made by the governments of the countries in my study. The spread in use of a state's official language through increased participation in education enabled the creation of Anderson's imagined community of strangers sharing ideas through shared literature and Gellner's interchangeable workers able to adapt to working wherever the state needed them to. Globalization reduces the boundaries between states, both as a direct consequence of increased participation in international trade and membership to international bodies, and as an indirect consequence of the movement of, and sharing of ideas between, an increasingly large number of increasingly well-educated cosmopolitan people. The implications of this for individuals is that knowledge of the language-of-state alone is not necessarily sufficient to ensure potential access to high-status social or economic opportunities (Blommaert, 2010). In turn, the ability of a state to thrive economically and politically in this globalized environment is often perceived as being dependent upon having citizens who are proficient in using other high-status languages in addition to the language-of-state. A situation which may well have implications for the status of the language-of-state itself. The acceptance by citizens of the use of the language-of-state as the sole (or dominant) MOI of a state's education system is dependent upon the acquisition and use of that language being seen as both necessary and sufficient for accessing social and economic opportunity. When learning through other languages is seen as being a better route to these

opportunities, the status of the official language within the national linguistic market may be threatened.

Many new states have used their education systems to retain (or introduce) knowledge of an international language in their population either by teaching it as a subject, or by using it as a MOI in at least part of their school system. These decisions to retain or adopt a language with high international status as part of an overall language-in-education policy were driven as much by the status of these languages within the global linguistic market as they were by any ambition to create an ethnically-neutral education system. For their citizens, knowledge of the international language was associated with increased cultural capital. It was a requirement for participation in higher levels of state administration and government and had the potential to open-up other pathways to economic success (Hobsbawm, 1995, p. 353).

Though it should be remembered that English is not the only language with international utility, the unique status of English within the international linguistic market has led to it being described as a *"recurring decimal"* as it features at some point in all discussions of education language policy in the Twenty-first century (Bamgbose, 2006). Spolsky described the increasing impact of the international linguistic market as being a *"tidal wave of English"* which affects the language management policies of all states – with some seeking to resist it and others to accommodate and benefit from it (Spolsky, 2004, pp. 219–221). Globalisation has increased the demand for opportunities to learn languages with international utility, especially English, in order to benefit from the social and economic advantages that they are perceived to bring, such as participation in the international higher education market. In addition, many states have altered their higher education language policies in order to attract and accommodate international students (Hughes, 2008; Soler-Carbonell et al., 2017). This demand is in spite of the body of research evidence indicating that only students from more socio-economically advantaged families are likely to benefit from these potential advantages (Coleman, 2011b; Hamid, 2016, p. 268). This critique is also applicable to the outcomes from monolingual state-building MOI policies which use a language-of-state other than English (Rassool, 2007, p. 256).

The rise in opportunities to work across international borders caused by intensified globalisation from the late-Twentieth Century onwards exposes MOI choice in schools to greater influence from the international linguistic market. This favours economically powerful languages that are commonly held to have a high-status that is independent of place, over languages whose status and prestige are tied to specific places, communities or countries (Blommaert, 2005, p. 69). This has a potential impact on the MOI choices made by governments (and the acceptance of these by parents and communities) based on a consideration of the economic and social advantages and disadvantages that using any one particular language, or combination of languages, will bring – both to individuals and to the state (Rubdy & Tan, 2008, p. 3).

The tension inherent in accommodating a demand for knowledge of high-status international languages within a school language-in-education policy whose primary goal is to promote the status and use of the language-of-state is particularly evident in countries where the language-of-state, whilst having a high status within the national linguistic market, is not itself an international language. This can be seen in legal challenges to Indonesia's creation of a network of élite, English medium, state-schools and Ukraine's attempts to restrict access to Russian medium schooling (ACDP, 2013; Janmaat, 2008, pp. 5–6). Whilst outside the scope of this study, this can result in the state-building aims of the language-in-education policy of a state-school system being undermined by a demand for private schooling (both high and low cost) which uses higher-status languages as the MOI, as is the case in Botswana and Tanzania (Shank Lauwo, 2020; Trudell, 2016, pp. 18–20). More affluent parents may even opt out of their country's education system completely by sending their children abroad to experience an English medium education. All of these actions have the potential to weaken the status of the language-of-state within the national linguistic market and increase social inequality even further (Fishman, 1996, p. 624; Qorro, 2013).

2.5 Transnational influences on MOI policy best-practice: a shift from equality to equity

I now extend the discussion of the potential influence that forces external to the state may have in steering MOI policy choice by considering changes to globally

promoted models of language-in-education best-practice. In the comparative education literature, discussions of the influence of globally promoted norms of educational best-practice range in scale from grand theories, such as Phillipson's Linguistic Imperialism and Meyer's World Culture Theory, through to ethnographic analysis of choices made by individual local policy makers (Meyer et al., 1992; Oppenheim & Stambach, 2014; Phillipson, 1992). There is much debate over how, if at all, international norms may work to influence national educational policy decisions and, if they do so, how they interact with the conditions in individual states (Carney et al., 2012; Ginsburg et al., 1990; Kim, 2019; Sonntag & Cardinal, 2015). One form of evidence for the existence of changing, internationally promoted, models of language-in-education (LIE) best-practice is the evolution of recommendations related to LIE policy of the United Nations and its agencies, in particular UNESCO and the World Bank.

Here I examine key education publications and legislation from the UN itself, UNESCO (the United Nations Education, Scientific and Cultural Organisation) and the World Bank (which has played a dominant role in educational funding and policy making since the mid-1960s) to identify changes in the advice they have given about language-in-education policies. Whilst UNESCO and the World Bank are both UN agencies they are legally and politically autonomous and each has been characterised (and possibly stereotyped) as having a distinctive stance on education policy: UNESCO as having a child-centred, or "language-as-right" orientation, and the Bank (being driven by a prioritisation of the economic development of the state) having a "language-as-problem" orientation. Within the academic literature there is debate over which of the two institutions has had the greatest influence on state language-in-education policy and whether these influences have changed over time (Borjian, 2014; P. W. Jones & Coleman, 2005, pp. 2,40-3; McNeely, 1995; Ruiz, 1984).

In its charter UNESCO is charged to *"promote collaboration among nations through education, science and culture"* in order to further the goals of the UN for all people *"without distinction of race, sex, language or religion"* (Constitution of the United Nations Educational, Scientific and Cultural Organisation (UNESCO), 1945). UNESCO was officially (if not effectively) the World Bank's technical arm for education until 1986 and has a trusted record for collecting educational data

and statistics. Having a very small budget, UNESCO influences the global policy environment by promoting UN conventions and *"introducing standards, policies or practices for others to adopt and take to scale"* (Jones and Coleman, 2005, pp. 69, 74–78). In contrast, the funding money that the World Bank is able to direct into state-education systems, leads to great weight being given to education policies recommended by it (Phillipson, 2012, p. 216). While the Bank can use coercive measures to push borrowers into taking up its developmental policies, its greater influence over education and development actions is through the production and dissemination of educational research and policy recommendations The Bank has been criticized over the relationship between its research work and its advocacy of developmental solutions, with research findings being applied selectively, or inappropriately, to support preferred Bank policy solutions(N. C. Alexander, 2001; Dethier, 2007, pp. 472–476; Heyneman, 1980; P. W. Jones, 2007, pp. 10-5,124-5; P. W. Jones & Coleman, 2005; Rassool, 2007, p. 259; Treffgarne, 1981; Wolfensohn, 1996; World Bank, 2012; Zapp, 2017).

2.5.1 MOI policy recommendations before 1990

The international attitude towards education rights changed through the first half of the Twentieth Century from considering the rights of groups, to one which prioritised the rights of individuals. The protection of group rights is seen in the *Minorities Treaties* promoted by the League of Nations in Eurasia after the end of the WW1. These allowed minority groups which used the language of a recognised "kin-state" to establish, and obliged states to fund, schools which used a language other than the language-of-state as the MOI (Waterbury, 2020). The Minorities Treaties' conditions only applied to languages which were already used as a language-of-state in at least one country. Inadvertently, the provision of access to education through higher-status minority languages created opportunities for members of the state's majority population to opt-out of national language education for their children. In the inter-war period, independent Latvia's school system had several language streams in addition to Latvian. German (even more than Russian) was the dominant language within the regional linguistic market and many Latvian-speaking families sent their children to German-MOI schools. In 1923, to protect the status of Latvian as the dominant MOI for education, a law was introduced which restricted access to minority MOI

schools for non-minority students (Björklund, 2004, pp. 122–123) (Lacombe,1997). Nearly all of these treaties had been revoked by the end of WW2 (de Varennes, 2008, pp. 122–124). However, managing the use of "kin-state" languages in state-school systems has remained a concern to the present day.

Brubaker described decision-making over the status of languages associated with kin-states that are used by established community groups as a *"triadic relational nexus linking national minorities, nationalizing states, and external national home lands"* (Brubaker, 1995). He pointed out that the relationship between minority group and kin-state (home land) does not need to be recognised, or sought for, by the minority group concerned for it to be used as a political or economic bargaining chip by the country nominally linked to this group by language. These "kin-state politics" have been recognised as still influencing language-in-education policy in the current century for reasons ranging from the provision of practical and financial support for education in kin-state languages, through to the inclusion or exclusion of kin-state languages within education being drawn on in diplomatic rhetoric (Waterbury, 2020).

The post-WW2 era began with the formation of the United Nations and a world-wide commitment to the attainment of equality and modernisation, including commitments to mass-education provision (Shapiro & Lampert, 2014, pp. 14–45). The experiences of WW2 led the newly formed United Nations to promote the recognition of universal (and equal) rights for all individuals and its *Universal Declaration of Human Rights* contained no reference to special rights for ethnic or national minorities. The rights defined in the *Universal Declaration of Human Rights*, which include the right to education (Article 26) are held by all, *"without distinction of any kind, such as race, colour, sex, language, religion, political or other opinion, national or social origin, property, birth or other status"* (Article 2) (Universal Declaration of Human Rights, 1948). The academic literature characterises the language-in-education policies of this time as prioritising the creation of a stable and linguistically homogeneous civil society and, in consequence, suppressing the use of minority languages within education (Kymlicka, 1995, pp. 2-3,57).

Despite UNESCO advocating for the educational, social and emotional benefits for a child of learning through their first language since 1953, issues surrounding the use of minority languages within the formal public domain were not framed in terms of language rights by the UN until 1979 with the publication of the *Study of the Rights of Persons Belonging to Ethnic, Religious and Linguistic Minorities* (Capotorti, 1979). The UN's engagement with the concept that linguistic minorities need equitable, rather than equal, treatment in order to thrive is considered to have started with the commissioning of this study. Since the proclamation of the *Universal Declaration of Human Rights* in 1948, there have been a number of international conventions and declarations which have made reference to language policy when considering the educational needs of children from minority language groups. These include UNESCO's Convention against Discrimination in Education, the ILO's Indigenous and Tribal Peoples Convention, and the UN's Convention on the Rights of the Child (Indigenous and Tribal Peoples Convention, 1989; Convention on the Rights of the Child, 1989; Convention against Discrimination in Education, 1960).

In 1953 UNESCO published *The Use of Vernacular Languages in Education* (UNESCO, 1953b), which is used to this day to support arguments in favour of education through a child's first language. Throughout the time period covered by this study mother-tongue education has been promoted by UNESCO as being psychologically, sociologically, and educationally the best medium for teaching a child in; though it should be noted that UNESCO's policy recommendations for specific countries have not always followed this principle (Banda, 1996; Kelly, 1991, pp. 111–113; Linehan, 2004). For children who do not speak the language-of-state the report recommends initial mother tongue education combined with as late a transition as possible to learning through the official language as the best method for ensuring effective learning, creating supportive links between the child's home and school life, and giving the child the necessary language skills to participate fully in society (UNESCO, 1953, pp. 47–48).

The authors of the report recognised that there would be barriers to achieving this aim. These included resistance from parents, who may prefer for their children to be educated through the language-of-state, or another dominant language, as quickly as possible for reasons of economic or social advantage – an issue which

still has weight in the present day (UNESCO, 1953, pp. 11, 55–56). Another barrier was mother-tongue education being seen as a threat to linguistic state-building. The report's authors argued that allowing vernacular medium education would increase rather than decrease national unity by preventing minority linguistic groups from feeling isolated from wider society, and, additionally, the improved educational outcomes will be of benefit to the country as a whole too – an argument which was picked up by the World Bank more than fifty years later. This child-centred approach to the issue of MOI policy was criticised at the time for putting the interests of the individual above those of the state and needlessly prolonging the use of marginal languages (Bull, 1964, p. 528).

The World Bank first became directly involved in education development in 1963 (World Bank, 1963a), with the Bank providing capital rather than technical assistance (which was UNESCO's role). Where MOI is mentioned in project appraisal reports of this time it is in terms of "language problems". The use of both French and Arabic within the Tunisian school system was described in terms of *"the burden of bilingualism"* (World Bank, 1962, p. 2) and Tanzania was criticised for using Kiswahili, rather than English, as the MOI for primary school (World Bank, 1963b).

The World Bank's 1974 *Education Sector Working Paper* was the first of the Bank's education policy papers to explicitly mention MOI policy as a factor which should be considered when assessing and planning for state-school systems. This recommendations for education in this document were intended to support the implementation of the Bank's new *"poverty-oriented development strategy"* for lending. By shifting its strategy for using education for economic development, from the production of a select group of highly-skilled workers, to raising society from the bottom up through mass basic education, the Bank's education planners were immediately presented with a much more linguistically diverse cohort of students to educate (World Bank, 1974, pp. 4-7,14). The language of teaching was identified as a factor contributing to high dropout and repetition rates and it was suggested that *"teaching in national languages would improve learning rates and student attitudes to schooling"* (World Bank, 1974, pp. 39, 40). The observation was also made that, *"In countries where teaching takes place in*

foreign languages, mother tongues are increasingly accepted as being more efficient learning vehicles for basic education." (World Bank, 1974, p. 31).

In its 1980 *Education Sector Policy* the World Bank acknowledged explicitly the role of national education systems in socialising individuals to the country's shared culture (World Bank, 1980, pp. 13–14). Using the examples of Mali and Egypt, the introduction of local, non-colonial, languages as MOI was characterised as *"a strong assertion of self-reliance and indigenous national identity"* , associated with a concern over *"the relevance of education to national needs"* and also described as being *"politically and culturally sensitive".* This was very different to its evaluation of the use of community languages as MOI in the 1960s. While the report's authors stated that *"literacy is most readily acquired in the language the learner already speaks"* and their final recommendation was in favour of the use of local languages for teaching, many barriers to the successful implementation of such policies were highlighted. Including the narrowing of students' future educational opportunities, being cut off from international debates and lack of teaching resources and trained staff (World Bank, 1980, pp. 19–21).

The concept of the national linguistic market can be used to understand the barriers to the use of community languages as MOI identified in the reports of this period. If a community language is allowed to be used in schools, but not in any other formal domains, then its status remains low and learning through it may not be seen as socially advantageous. If a community language is allowed to be used in other formal domains in addition to basic education, then learning through the language may become more appealing. However, the inclusion of additional languages within formal domains may then be seen by policy makers as threatening the status of the national language – so may be resisted. All of the arguments from this period against the introduction of MOI choice in basic education give priority to the role of education systems in developing the state as a whole – creating a literate workforce and contributing to the development of a shared national linguistic identity. Considerations of improving the educational experiences of individual children are secondary to this. This attitude is modified, but by no means eliminated, from the 1990s onwards with the advent of the Education for All era.

2.5.2 MOI policy recommendations after 1990

Within the academic literature there is a recognition of the increasing strength of influence of international and transnational organisations on state-education systems from the late-Twentieth Century onwards (Block, 2008). The UN's 1992 *Declaration on the Rights of Persons Belonging to National or Ethnic, Religious and Linguistic Minorities* promotes equitable, rather than equal, treatment of minority groups. It acknowledges explicitly that there are citizens within states who use languages in addition to, or instead of, the language-of-state; and makes the non-binding recommendation that their use of these non-state languages should be supported by the state. Article 4, Section 3 requires that, *"States should take appropriate measures so that, wherever possible, persons belonging to minorities may have adequate opportunities to learn their mother tongue or to have instruction in their mother tongue."* (UN General Assembly, 1992). This declaration reflected increasing concerns in the international arena during the last few decades of the Twentieth Century that the benefits of modernising state-building projects were not felt equally by all groups within a country. It is contemporaneous with the 1989 *Convention on the Rights of the Child*, Article 29 of which states that *"the education of the child shall be directed to . . . the development of respect for the child's cultural identity, language and values").*

The 1990 *World Conference on Education for All* in Jomtien, Thailand, was held under the joint sponsorship of the four UN agencies most heavily engaged with the development of education: the United Nations Development Programme (UNDP); the United Nations Educational, Scientific, and Cultural Organization (UNESCO); the United Nations Children's Fund (UNICEF); and the World Bank (P. W. Jones & Coleman, 2005, p. 1; World Bank, 1995, p. xi). It marked the beginning of the current era of international collaboration and global goal setting in education and development, which has exerted a marked change on the content and delivery of bilateral and international aid to education (Osttveit, 2014). Article 3 of the *World Declaration on Education for All, Universalizing access and promoting equity* , which states that *"linguistic minorities . . . should not suffer any discrimination in access to learning opportunities"* recognised the barrier that language policy can present to accessing education (UNESCO, 1990).

The EFA goal of universal access to primary education (UPE) was not achieved during the 1990s, so it was rolled over into the UN's *Millennium Declaration* and the *Millennium Development Goals* (MDGs) (United Nations Millennium Declaration, Resolution Adopted by the General Assembly, 18 September 2000, 2000). The final report from the 2000 *World Education Forum* in Dakar, Senegal drew attention to the importance of bilingual and mother-tongue education for improving social integration and ensuring universal access to primary education (UNESCO, 2000, p. 28). Monitoring global progress towards the achievement of the MDGs (and their 2015 successors the Sustainable Development Goals) has led to unprecedented amounts of comparative data being collected on the performance of individual states' education systems. This data provides empirical evidence of the potentially negative impact that a mismatch between a student's home language and language of schooling can have on educational achievement (Pinnock, 2009; Taylor-Leech & Benson, 2017; UNESCO Global Monitoring Report Team, 2010, p. 154).

The promotion of equitable, rather than equal provision of social services is also reflected in policy and position papers published by regional and international actors at the beginning of the Twenty-first Century (Roberts-Schweitzer, 2006; Dani and de Haan, 2008; Marc, 2009; Regional Cooperation Council, 2017). In these, equitable provision of social policies, including accommodating linguistic diversity, is promoted, not only to increase the effectiveness of programmes, but also as a strategy for building social-cohesion and contributing towards state-stability. These recommendations are not legally binding (unless ratified and incorporated into law by a state) but, taken together, they contribute to an international policy environment which is more sympathetic to the adoption of MOI policies which use other languages in addition to the language-of-state (de Varennes, 2008, p. 121,134). However, the benefits of this to linguistic minority groups is disputed. Some commentators hold that allowing minority groups to use their language in formal public domains is a soft right which works to the advantage of the dominant group by *"defusing minority nationalisms"* and *"preserving the overarching unity of the state in the long run"* (Ferguson, 2006, pp. 5–6). Such gestures may be designed more to strengthen the legitimacy of a government (potentially both domestically and internationally) by signalling that it is aligned with aspirational models of social or educational best-practice, than to

improve access to public services for less-dominant linguistic groups (Ginsburg et al., 1990, p. 328; C. H. Williams, 2013, pp. 11, 294).

In 2003 UNESCO updated its position on language-in-education, publishing a new policy paper, *Education in a Multilingual World* (UNESCO, 2003). This document reiterates the 1953 promotion of policies that use a late transition from using home languages to using the language-of-state as MOI (UNESCO, 1953, p. 55). A new recommendation is that language learning should be used as a tool for intercultural education for all children, including those who speak the dominant language of the state (UNESCO, 2003, pp. 31–33). The 2003 paper differs from the 1953 report in its justification for why minority languages have a place in education. It is presented as an educational and linguistic right, rather than merely an efficient teaching strategy (UNESCO, 2003, pp. 8–9). *Education in a Multilingual World* was published at the beginning of the target-driven international developmental era of the Twenty-first Century in which UNESCO took the lead in coordinating support for the achievement of the education-related targets of the MDGs and SDGs. In consequence, UNESCO materials that promote the use of home languages as MOI in basic education gained a much higher profile and potential impact than UNESCO's original 1953 document (UNESCO, 2011a, 2016).

After 1990 discussions of MOI issues have a much higher profile in World Bank education position papers than they did in the pre-EFA era. In 1990 the Bank identifies *"differences between the language of instruction and local languages"* as a barrier to rural children enrolling in and completing primary school (Lockheed, 1990, pp. 5-7,33,50). In a summary of the arguments surrounding home language instruction, language policy is described as "*the most difficult form of discrimination to address*" and that any effective solution "*will necessarily be heavily influenced by the unique economic, cultural, political, and linguistic factors in each country*" (Lockheed, 1990, pp. 37–38). The increased amount of time given to the discussion of practical issues related to education provision, such as MOI choice, is an indicator of the World Bank's increasingly prominent role as an arbiter of best-practice in education policy.

Reflecting the more co-ordinated nature of the post-EFA international education development landscape the Bank's 1995 document *Priorities and Strategies for Education* stresses how the World Bank's focus on funding projects to support basic education is *"in harmony with the recommendations of the World Conference on Education for All"* (World Bank, 1995, p. xi,110). The discussions of increasing the efficiency, equity, and quality of education systems are couched in terms of states fulfilling their obligation to their citizens who have a *"right to basic education"* as well as in terms of poverty reduction (World Bank, 1995, pp. 1–2, 10). It is in relation to equitable access to basic education that MOI gains the most attention. The observation that *"for linguistic minorities, bilingual programs and schools offering a choice of language of instruction are important, especially in primary education"* is presented within a discussion of the creation of equitable state-education systems (World Bank, 1995, pp. 10–11). Because this is a Bank document, the language repertoires of linguistic minorities are discussed in terms of their human capital endowments and their potential for conversion into earnings, it is observed that there is *"a labor-market incentive for acquiring skills in the dominant language"* (World Bank, 1995, pp. 27, 78–80).

The World Bank published additional educational policy documents in 1999 and 2005 (World Bank, 1999, 2005). These responded not only to changes in the field of international development, but also to the rapidly changing global political environment. The 1999 document was written in the wake of the collapse of the Soviet Union, the Rwandan genocide, and other incidences of the disintegration and subsequent creation of states. The rebuilding of education systems in post-conflict areas is discussed as an area of special concern and, although the Bank is still promoting human capital theory to measure the link between education and economic productivity, it also emphasises the *"influence that schools can have on strengthening social cohesion, building social capital, and transmitting values and behaviors"* (World Bank, 1999, pp. 3, 51). In the 1999 document, the fact that language barriers can adversely affect educational outcomes is treated as a given and language of instruction is one of the points included in a checklist of questions for identifying educational issues and priorities (World Bank, 1999, pp. 3, 6, 33, 41).

In its 2005 document the World Bank continues its promotion of formal education as a tool for economic development but also aligns itself explicitly with the goal of *"helping client countries attain the Education for All and Millennium Development Goals"* (World Bank, 2005, p. 5). This reflects the increasing strength of the whole-world, cooperative approach to educational development, which was further strengthened with by the *Education for All Fast Track Initiative*. The *Fast Track Initiative* (rebranded and 2011 as the *Global Partnership for Education (GPE)*) was a partnership of developing countries and donors created in June 2002 to help low-income countries achieve the *Millennium Development Goal* of universal completion of primary education by 2015 by allocating additional *"catalytic fund grants"* for education (World Bank, 2005, p. 1). The management of the GPE reflects the unified approach which the major development organisations have adopted towards educational aid in the Twenty-first Century: UNESCO, UNICEF, and the World Bank each have a seat on the GPE board of directors (GPE, 2019).

Considerably strengthened in the Bank's 2005 document is the theme of creating more inclusive, or representative, language-in-education policies as a strategy to promote social cohesion by reducing barriers to inclusion for members of linguistic minority groups (World Bank, 2005, p. 37). The need to consider the potential impact of language choices when designing social services is a common theme across World Bank publications of this time (Marc, 2009; Roberts-Schweitzer, 2006). This consideration of flexibility in MOI as being of benefit to the whole of society is a noticeably different stance to the Bank's pragmatic promotion of mother tongue education in the 1980s to increase the educational attainment of disadvantaged groups, and is similar (in form, if not in the ideology driving it) to the rights-based language-in-education policies promoted by UNESCO (Rassool, 2007, pp. 258–259). However, it should be noted that whilst both UNESCO and the World Bank promote the advantages of using home languages as MOI in basic education, neither institution in any way challenges the right of states to use their language-of-state as the dominant MOI of their state-education system.

External to the United Nation's agencies, the stance that knowledge of the dominant language-of-state is essential for academic success, is also held by the

Organisation for Economic Co-operation and Development (OECD), which has become an increasingly influential voice within the field of education since the beginning of the Twenty-First Century. Launched in 1997, the Organisation for OECD's Programme for International Student Assessment (PISA) has become an increasingly powerful voice in the international educational arena and supports the OECD's perspective of education as a tool for economic development. Recent rounds of PISA have shown that there is a significant difference in the academic performance of fifteen-year old students who usually speak the language of the PISA test at home and those who do not (OECD, 2016, p. 256, 2019, p. 66). Within OECD publications, not speaking the language of schooling at home is presented as a disadvantage to students, and the disparity in academic performance is discussed most fully in terms of its implications for the successful integration of migrant children into state-education systems. Overall, the OECD gives few recommendations for language-in-education policy best-practice but where it does address the topic it is in terms of facilitating access to schooling in the dominant language, rather than the use of a wider variety of languages for teaching and learning (Field et al., 2007, Chapter 6; OECD, 2019, Chapter 9).

2.6 Analysing MOI policy choice in terms of linguistic state-building within a wider international linguistic market.

I take into account the changing external influences of the international linguistic market and globally promoted models of educational best-practice in my analysis of the MOI policy trajectories of newly-formed states. Using Bourdieu's concept of the linguistic market, I present modern state-education systems in their role as tools for linguistic state-building. Using the state's official language as the dominant MOI has the potential to reinforce the high status and utility of that language. Although most states' governments have the power to decide which languages will be included for use within their MOI policies, it does not immediately follow that a language privileged for use as an MOI will attain a high status within the national linguistic market, or that MOI choice can be made without consideration of existing patterns of language status and usage, both within and beyond the country's borders. MOI policy decisions are made within a social context where a host of linguistic, political and socio-economic factors, both

within and outside the state, can influence both the MOI policy-making and policy-implementation processes (Cooper, 1989, p. 163; Haarmann, 1990; Kymlicka and Grin, 2003, p. 19; Spolsky, 2004, pp. 6, 217–219). Overarching and uniting all of these internal and external influences on MOI policy choice is the linguistic market – with the state's internal, national, linguistic market forming a part of, and being influenced by, the wider, international, linguistic market.

Education systems and their MOI policies are shaped by their past and influenced by their current relationship with the wider world. MOI policy choices should be contextualised in terms of the influence of established traditions of literacy and language-in-education policy (including previous levels of participation). These traditions set up expectations for which languages are considered suitable for use as MOI and they establish a hierarchy of status between the languages within the national linguistic market. Any changes to MOI policy need to be understood in terms of the implications which they may have for reinforcing, or disrupting, these established patterns of linkages between literacy and social advantage. I am interested in the MOI choices of new states because the act of becoming independent creates a moment of rupture and an opportunity for change and the creation of new traditions. The period of time covered by my study, from the mid-Twentieth Century onwards, has been characterised as one of increasing globalisation which has potential to affect the real and perceived utility of languages used as MOI within a state, and thus influence MOI policy choices.

 Even when firmly established and supported by LPP mechanisms in other fields, the legitimacy of the use the official language(s) as the MOI of the state-education system can be challenged or resisted. This challenge can come from within or without of the national linguistic market. How this challenge is responded to, particularly in terms of protecting the status and use of the official language(s) will depend upon the interests of the policy makers (Bourdieu and Wacquant, 1992, p. 102). For my cases, I see this challenge coming in two (sometimes overlapping) forms: calls (which may come from inside or outside of the state) for the use of community languages as MOIs; and a perceived desire for greater access to competency in languages with high status within the international linguistic market. I am interested in whether MOI policy strategies for responding to these challenges have changed over the period of time covered by this study.

In *The Production and Reproduction of Legitimate Language* Bourdieu developed and illustrated his concept of the linguistic market using France as his example (Bourdieu, 1992b). Taking inspiration from Blommaert's globalised treatment of the impact of language status and usage on the micro-scale (Blommaert, 2005, pp. 15, 18, 69), and Bourdieu's deliberately open definitions of his "thinking tools" of fields and capitals (Bourdieu and Wacquant, 1992, pp. 94–114),I structure my investigation of MOI policy choice by extending the analytical concept of the linguistic market to compare the MOI policy choices of many states made within a shared international linguistic market. I use the idea of linguistic markets as an umbrella term which can accommodate all of the different factors, both historic and contemporary, which may sway the MOI policy choice that a government makes for its state-education system.

In this model I see a state's education system as being situated within and forming a part of the state's national linguistic market. This national linguistic market is, in turn, situated within and forms a part of the larger international linguistic market. Linguistic markets regulate the relative statuses of the different varieties of linguistic capitals used within then – this status being determined by the nature of the groups and functions with which each language is associated (Bourdieu and Passeron, 1977, p. 23) These relative statuses can alter, depending on the particular field in which they are being used; and the status with which a language is held in one field can influence the evaluation of its status in other fields (Bourdieu and Wacquant, 1992, p. 105). Some languages are treated as valuable, high-status, linguistic capital across wide parts of the international linguistic market, whilst for others their high-status value is more closely tied to particular states or communities (Bourdieu, 1992a, p. 170). This difference in the transferability of status can lead to more "international" languages potentially threatening the status of a national language within its own linguistic market. This threat then needs to be managed or accommodated by the state's government using LPP strategies.

Bourdieu's sociological approach has been critiqued for only explaining the maintenance and reproduction of national systems and attributing all social change to the result of responding to unexplained external pressures (Jenkins, 2014, p. 81; A. King, 2000). I am expanding the concept of the linguistic market

to emphasise that national linguistic markets are not discrete entities – rather they are parts of a globalised system. Changes to the conditions in one part of the system will influence other parts of it, so these changes can be seen as distant from, rather than external to, the place that they affect. In addition, by looking at MOI choices across time, I can investigate whether the "practical logic" of linguistic state-building can be used to explain MOI choices made at different periods of time.

My model is not a statement of the thought processes of policy makers, or of the motivations which drive their actions. Rather, it is a way of identifying and describing regularities which I have observed across the cases in my study – it is a "logic" which matches with observation (Bourdieu, 1990, p. 39). By looking at MOI policy changes I am considering how the field of education is reproduced, protecting historically established linguistic practices if they benefit the dominant linguistic group, or manipulating them to fit new circumstances (Bourdieu, 1990, chap. 3). It is an explanation of choices that have been made, not a description of rules that social actors follow consciously (Bourdieu, 1990, p. 81). I am considering whether MOI choice strategies can be understood as following a "practical logic" based on a desire to ensure the success of plans for linguistic state-building (Bourdieu, 1990, p. 102). Whilst Bourdieu was using the concept of practical logic to describe people's everyday choices and actions, it is useful for conceptualising MOI policy choice as well, as these choices are also made by groups of actors in response to their (usually privileged) experience of the historical, current and future world in which they live. Rather than considering cases in isolation or in regional groups, my analytical model provides a global context to patterns of MOI policy choice. Doing so gives researchers and advocates of MOI policy change an additional, global, perspective on the factors which influence MOI choice, which they can use to inform and strengthen their own work.

In the remainder of this chapter I review how state language planning policy has been analysed within the academic literature and show how my novel approach to analysing MOI policy choice will contribute to this literature.

2.7 Review of the language planning and policy (LPP) literature

Within the language planning and policy (LPP) literature interpretation of the role and function of language within society has evolved from viewing regulating language use in the public sector as a neutral tool for national social and economic development, to recognising the concepts of linguistic human rights and positioning language choice as a political and social act (Blommaert, 1996; Cassels Johnson & Ricento, 2013, p. 7; Jernudd, 1997, p. 133; Sallabank, 2011, p. 277; Tollefson, 2002a).

Understanding these changes in perspective was particularly important for my research, not only because of the potential impact (whether direct or indirect) that the academic literature and LPP academics may have on MOI policy decisions (Dethier, 2007, p. 476; lo Bianco, 1987), but also because I use the academic literature as a major source of case data for this study. By having a clear understanding of the shifts in how MOI policies have been presented and interpreted in the LPP academic literature I have been better able to combine information from sources of different ages to make meaningful comparisons between MOI policy choices made at different times and in different places.

In the two decades after the end of WW2, there was an acceptance in the LPP literature of the view that language policies for state-regulated domains should be led by considerations of *"efficiency"* rather than *"authenticity"* to facilitate the smooth running of government and state institutions (Fishman, 1968, p. 7). The influence of the Nineteenth Century meme of considering linguistic unity to be an essential component of civic unity, combined with the United Nation's promotion of equality for all as being essential for peace, guided much of the debate over, and decisions made on, language policy for education in the new states which emerged at this time. Language was treated as a resource which could be manipulated to achieve societal unity and economic development (Cassels Johnson & Ricento, 2013, p. 8; Haugen, 1959). The practicalities associated with corpus and acquisition planning for a language-of-state were given more attention than issues related to the impact of such policies on speakers of other languages (Whiteley, 1968). Writers in the field of comparative education also shared the belief that the use of a shared language-of-state in newly-independent countries was essential for promoting a homogeneous expression of civic

national identity and to ensure the development of a stable political state. State supervised mass-education systems were seen as tools, not only of modernization, but also of civic identity formation (Hans, 1958).

Whilst it may be broadly correct to say that early sociolinguistics research took a *"rational problem solving"* approach to LPP activities (Nekvapil, 2006, pp. 92–3), driven by a discourse of *"multilingualism as a problem"* (Blommaert, 1996, pp. 202–214), It is important not to caricature the pragmatic and instrumental strategies promoted by the language planners of this period as being made without consideration of the consequences of the top-down language policies of the day; or of the power of the ideologies driving such decisions. Writers drew attention to the essentially political nature of language policy decisions (Whiteley, 1971, p. 8)*; questioned *"the supposedly unifying effect of using a single national or official language"* (Bowers, 1968, pp. 382–383); highlighted potential negative consequences of the suppression of minority languages and identities (das Gupta, 1968, pp. 21–23; Haugen, 1971, p. 288; Kelman, 1971, p. 1971); and warned of the potential for school MOI policies to increase social stratification (Nida & Wonderly, 1971, p. 73; Thorburn, 1971, p. 261)*.

During the 1970s and 1980s the field of sociolinguistics was characterised by a growing disillusionment with positivistic solutions to social and economic problems (Baldauf Jr., 2012, pp. 235–236; Cassels Johnson & Ricento, 2013, p. 11), an engagement with discourse-based critical theory, and increasing importance being given to issues of globalisation, migration and supranational political communities (Jernudd, 1997, p. 137; Ferguson, 2006). This led to greater consideration being given to issues such as the validity of fixed categories and the reproduction of patterns of inequality when promoting, or commenting upon, LPP activities, including language-in-education policies (Jernudd, 1991, p. 132, 1997, p. 133; Nekvapil, 2011; Neustupny, 1997, pp. 208–209; Tollefson, 2002a, pp. 3–4). The *"ideologically neutral"* portrayal of state LPP activities during the classical language planning era was replaced by a deeper engagement with the *"profoundly political"* nature of the discipline (Ferguson, 2006, pp. 4–9). Ruiz's 1984 paper *Orientations in Language Planning* is an early example of an exploration of the ideological forces which can drive state language policies and

their social consequences (Ruiz, 1984; Cassels Johnson and Ricento, 2013, p. 10).

Theories developed by critical scholars, including Bourdieu, are used within the LPP literature to explore how language repertoires and language policies influence all aspects of social life and to cast a light onto language ideologies which, acting through language policies, contribute to social disadvantage and result in unequal access to the benefits of education (Baldauf Jr., 2012, pp. 237– 238; G. Ferguson, 2006, p. 9; Ricento, 2008, pp. 44–50). Themes of investigation include the role of discourse in constructing and regulating attitudes towards languages and their speakers (Jernudd, 1997; Jernudd & Neustupny, 1987); the ideology and interests driving LPP actions (Cooper, 1989, p. 46; Tollefson, 2002, p. 6); and challenging the national and international mechanisms which lead to the marginalization of non-dominant languages within state-education systems (Brock-Utne, 2001; Phillipson, 2012, p. 206,215; Rassool, 2007, pp. 251–254; Romaine, 2013, p. 6).

A core characteristic of the critical LPP literature is consideration of language policies as mechanisms for gaining or maintaining power and their evolution as part of a historically-situated sociological process (Cassels Johnson, 2013, p. 226; Cassels Johnson & Ricento, 2013, p. 12; Myers-Scotton, 1993). Particular attention is given to the influence of long-established institutional conventions, including those inherited by new states from their colonial-era administrations, to shape modern societal norms towards language use in high status domains (Sonntag & Cardinal, 2015; Tollefson, 1991, p. 32). My own approach to analysing MOI policy choices aligns with these concerns. I am using a global, comparative perspective to show that, despite increased attention being given to issues of equity, school MOI policies remain driven by a policy logic of maintaining the status of official languages within national linguistic markets.

2.7.1   Positioning this study within the comparative MOI policy literature

Within the contemporary LPP literature, there are many detailed single-country studies of language policy which include information about language-in-education policy (T. Bulajeva & Hogan-Brun, 2008; Gopinathan, 2007, 2013; Nyati-Ramahobo, 2000). The literature also contains comparative studies which

compare the language-in-education policies of a small number of states. These comparisons are usually justified on the grounds of commonalities of colonial history or current demographic or linguistic characteristics (Alidou, 2009; Arthur, 2001; Fierman, 2009; Hogan-Brun et al., 2008; Kamwendo & Mooko, 2006; Myers-Scotton, 1993). Where these studies look at the different language-in-education policy strategies of states in one particular region, or with a shared history, in my study I am seeking to understand why very different states may choose to adopt similar MOI policies.

Within the academic literature and the publications of NGOs, aid agencies, and INGOs, MOI policy has been given increased attention since the 1990s. Much of this work stems from transnational initiatives to collect comparable data on countries' education systems and their performance. Information about national education policies is collected and published by a number of regional and international institutions (Eurydice Network, 2021; GEM Report, 2020a; International Bureau of Education, 2012). These transnational initiatives do publish some comparisons of contemporary education language policy and its impacts. In the Global Education Monitoring (GEM) Reports, the interaction between students' language repertoires and MOI policies and its impact on access to effective education is a long-running theme (UNESCO, 2020, pp. 115,122-3). Whilst these publications recognise the power of MOI policies to shape students' educational experiences, they generally focus on current policies in one particular region of the world or one particular aspect of MOI policy. They tend not to consider how MOI policies as a whole have changed over time (Kosonen, 2017; Smits et al., 2008). Several university-based studies have also been established to collect and compare global patterns of change in education policy (Leclerc, 2020b; SchoolPol, 2021; University of Winnipeg, 2019). So far, none of these studies have made a comparative investigation of global patterns of change to the MOI policies of new states.

Within the academic literature there are edited volumes with a language policy focus (Sercombe et al., 2014; Tollefson, 2012) (2014)(2012)but these do not provide a systematic analysis of factors associated specifically with MOI policy choice and change across a large number of cases. There are also a number of larger comparative studies (10 or more cases) which focus on different aspects

of language-in-education policy (Bamgbose, 2000; Banjo, 2000; Kamwangamalu, 2013; Kirkpatrick & Liddicoat, 2017; Liégeois, 2007; Pavlenko, 2008b; Spolsky, 2018b, 2018a). In common with my study, these larger comparative studies depend upon the secondary analysis of documentary data. Whilst these larger comparative studies highlight the enduring influence that past MOI policies, including those implemented by colonial governments, can have on current MOI policies, they do not make systematic comparisons of how MOI policies have changed in response to changes in globally-promoted models of educational best practice. Nor do they look for similarities between regions. In contrast, my data is a global sample and is also longitudinal. This enables me to compare MOI policies across cases at different points in time, from 1965 to 2015 and also to identify similarities of approach across regions.

One study which does take a longitudinal approach is Albaugh's *"State-Building and Multilingual Education in Africa"* (2014) which takes a longue durée approach to explain the trend towards using multiple languages of instruction in education in Africa. In common with Albaugh, in my study I consider how international trends, including attitudes towards educational best-practice, can alter long-established MOI policy conventions. My study is distinct from Albaugh's because, rather than focusing on the increased prevalence of one type of MOI strategy in one region of the world, I am comparing the MOI policy trajectories for both primary and secondary school of a global sample of new states. Also, whilst Albaugh used regression analysis to investigate the relationship between potential causal factors and the likelihood of adopting a multilingual education policy, I use qualitative comparative analysis (QCA) to identify the presence of conjunctions of case characteristics associated with different types of MOI policy. The use of QCA to organise and interrogate the large quantity of data I have drawn on makes my analysis methodologically distinct. QCA is an approach to research which is currently underutilized in comparative education research, particularly in studies with a temporal component (Cilesiz & Greckhamer, 2020; Rihoux et al., 2013). In the next chapter I describe the features of QCA which make it an appropriate methodological strategy for this research study.

2.7.2 Review of current MOI policy typologies

To operationalize my comparison of MOI policies across many states and time periods I needed a system for describing and grouping MOI policies. The existing language policy typologies fall into main two groups: those which classify a state's overall language policy strategy and those which compare levels of bilingual education provision.

State language policy typologies link together status planning policies, current patterns of language use, and ideologies or orientations towards language use. Fishman's (1971) scheme (Table 2-1) classifies the language policy choices of developing nations as being driven by either a-modal, uni-modal, or multi-modal model of *"perceived socio-cultural integration".* That is, whether, or not, the policy-making élite considers there to be one or more *"Great Traditions"* (defined as a widely recognised and distinctive socio-linguistic-cultural identity) present within their country that can be used in the construction of a sense of cohesive national identity for the citizens of their new country.

Similarly, Laitin's two-dimensional typology of potential language situations in African states (Table 2-2) associated a states' socio-linguistic characteristics and official language policies with different strategies for national development (Laitin, 1979). It should be noted that Laitin's use of Tanzania and Senegal as examples of linguistically and culturally homogeneous societies reflected more the official rhetoric of those state's policy-makers than it did the reality of patterns of language use in those countries.

Both Fishman and Laitin's classification schemes are products of their time and depend on the assumption that using a common language in formal domains (which include education and the media) is *perceived* by a country's policy-makers as being an essential part of modern state-building. However, in his multi-modal category Fishman did envisage a situation where more than one language may be used in formal domains. He also held that the reasoning process leading to any language policy decision needs to be understood from a phenomenological view-point and that élite decision-makers are likely to make language policy decisions which maintain, or improve, their own culture and status within society (Fishman, 1971, p. 31).

Factors	A-modal nations	Uni-modal nations	Multi-modal nations
Perceived socio-cultural integration	No integrating Great Tradition at the national level	One Great Tradition at the national level	Several Great Traditions seeking separate socio-political recognition
Selection of National Language	Governed by considerations of political integration: nationism ("civic" national identity)	Governed by considerations of authenticity: nationalism ("ethnic" national identity)	Governed by need to compromise between political integration and separate authenticities
Adoption of LWC?	Yes, as permanent, national symbol	Often transitionally: for modern functions	Yes, as a working language, a unifying compromise.
Long-term bilingualism goals for formal state-controlled domains	**Type A:** Local and regional languages will be used in informal domains; education will increase the use of the National Language with the goal that formal domains will become monolingual with the LWC only used.	**Type B:** A transitional period of bilingualism in modern formal domains whilst the indigenous national language is modernized, with the goal of monolingual use of the national language in all formal domains.	**Type C:** Modernization carried out on each of the regional languages, with the goal of permanent bilingualism using the LWC and (depending on the area) one of the regional languages in all formal domains.

Table 2-1 Fishman's 1971 scheme for classifying the national language policies of developing nations. Based on Fishman (1971) pg.34 "National languages and languages of wider communication in the developing nations"

	Current language usage	
	Homogeneous Society	**Heterogeneous Society**
Indigenous Official Language	1.Nation-consolidating (Tanzania)	3. Empire-building (Ethiopia)
Non-indigenous Official Language	2.Nation-transforming (Senegal)	4. Nation-building (Kenya)

Table 2-2 Table 2 2 Laitin's (1979) typology of national language development strategies.

A more recent state language typology is Faingold's (2004) survey of state constitutions and their language rights and obligations, which grouped constitutions into 24 types. These types are characterised as being either "hands-on" (extensive de jure language policy) or "hands-off" (limited or no de jure language policy); with the former being used by countries which *"possess unassimilated language groups or groups having or seeking autonomy or secession"* and the latter by countries that *"possess (or claim to possess) a strong sense of national identity and no groups of citizens having or seeking autonomy or secession"* (Faingold, 2004). Faingold's grouping highlights the importance frequently attached to establishing and protecting a country's official linguistic identity.

Fishman's, Laitin's and Faingold's typologies utilize the concepts of linguistic state-building and the establishment of a national linguistic market with the state's

official language as the dominant language to interpret state language policy strategies, but they do not distinguish in any detail between the different language planning strategies which may be used to achieve these aims. Such details are found in typologies that classify school MOI policy types. Some describe the variation in types of MOI regimes present within the education system of one particular country (Adamson & Feng, 2014; Gaudart, 1987). Others create a template of descriptive categories which can be applied across many education systems (May, 2008a; Ó Riagáin & Lüdi, 2003). MOI policies vary across many different dimensions (age at which languages are introduced; which schools use which languages; which subjects are taught in which languages, etc.) and MOI classification systems separate cases based on the dimension(s) considered, by the researcher, to be of most practical or theoretical relevance to the problem under consideration (Bailey, 1994, Chapter 1).

The motivation for designing MOI classification systems varies, but they all recognise that decisions on MOI policy are influenced by the overall language policy goals of the state. Because MOI policy is most likely to become a contested issue when there is a mismatch between the languages used and valued by a learner and their community and those used within the state's education system, most typologies of MOI policy are found within the literature on bilingual education and focus on the learning experiences available to students whose home language is other than the dominant MOI – though some, such as May (2008), recognise other motivations for using non-state languages as MOI.

Adamson and Feng's (2014) study of the implementation of China's trilingual education policy for minority groups (the child's first language (L1), the state language, Putonghua (L2) and English (L3)) draws attention the issue that a policy can be implemented in the classroom in many different ways (Table 2-3). They identify four models of implementation (accretive, balanced, transitional, depreciative) with outcomes that range from additive trilingualism (ability in all languages is developed) to subtractive bi- or trilingualism (development of L1 ability is ignored or actively suppressed). Their matching of strategies of classroom language use to wider language planning goals (the maintenance or suppression of non-dominant language identities) aligns with the theoretical

structure of this study and could be adapted and applied to other cases. However, because it concentrates on provision for minority groups, it does not give a full picture of a country's overall MOI situation. For example, in China, there is also some promotion of the use of English (a high-status international language) as an additional MOI in certain schools (Wei & Feng, 2015).

Models	Aims	Key features	Likely outcomes
Accretive	To maintain L1 and ethnic identity and foster real trilingualism	Using L1 as MOI (MoI) as minority pupils dominate L2 and L3 are promoted robustly as school subjects	Strong competence in L1 Additive trilingualism
Balanced	To develop both L1 and L2 To promote ethnic harmony	Mixed Han and minority groups Using both L1 and L2 as MoI L3 introduced as subject	Strong competence in L1 and L2 Likely to foster additive trilingualism
Transitional (a) L2 as MoI but L1 taught (b) L1 as MoI in early years to change to L2 as MoI	To eventually shift to L2 as MoI To assimilate pupils into the mainstream	L2 emphasised in classrooms Pupils' L1 is only deemed useful as a steppingstone	Acquiring competence in L2 at the expense of L1 (leading to subtractive bi- or trilingualism)
Depreciative	To aim, usually covertly, for monolingualism Linguistic and cultural assimilation	L2 is the only MoI and L1 is ignored	Acquiring competence in L2 at the expense of L1 (leading to subtractive bi- or trilingualism

Table 2-3 Summary of the four models for trilingual education in the People's Republic of China. Adapted from Adamson & Feng (2014, p.39)

May's (2008a) multi-dimensional system for classifying MOI policies (Figure 2-1) compares and describes the extent to which different education systems provide bilingual education. Like Adamson and Feng's model, it also distinguishes between additive and subtractive approaches to bilingual education.

This division is overlaid with a four-level categorization of the aims of bilingual education programmes and a graduated continua of methods for achieving the desired programme aim. May's typology shows links between attitudes towards language diversity and MOI policy choice and thus has the potential to facilitate a deeper understanding of the decision-making processes behind MOI choice.

This typology also recognises the presence of CLIL-type additive or enrichment MOI strategies. These, rather than supporting (or suppressing) the use of minority languages, use a high-status language other than the language-of-state as an additional MOI (Pérez-Cañado, 2012). The main strength of this model, that it captures the many dimensions through which language policies can vary, makes it unsuitable for me to use to classify the cases of MOI change in my project, as it would divide them into an unmanageable number of sub-types.
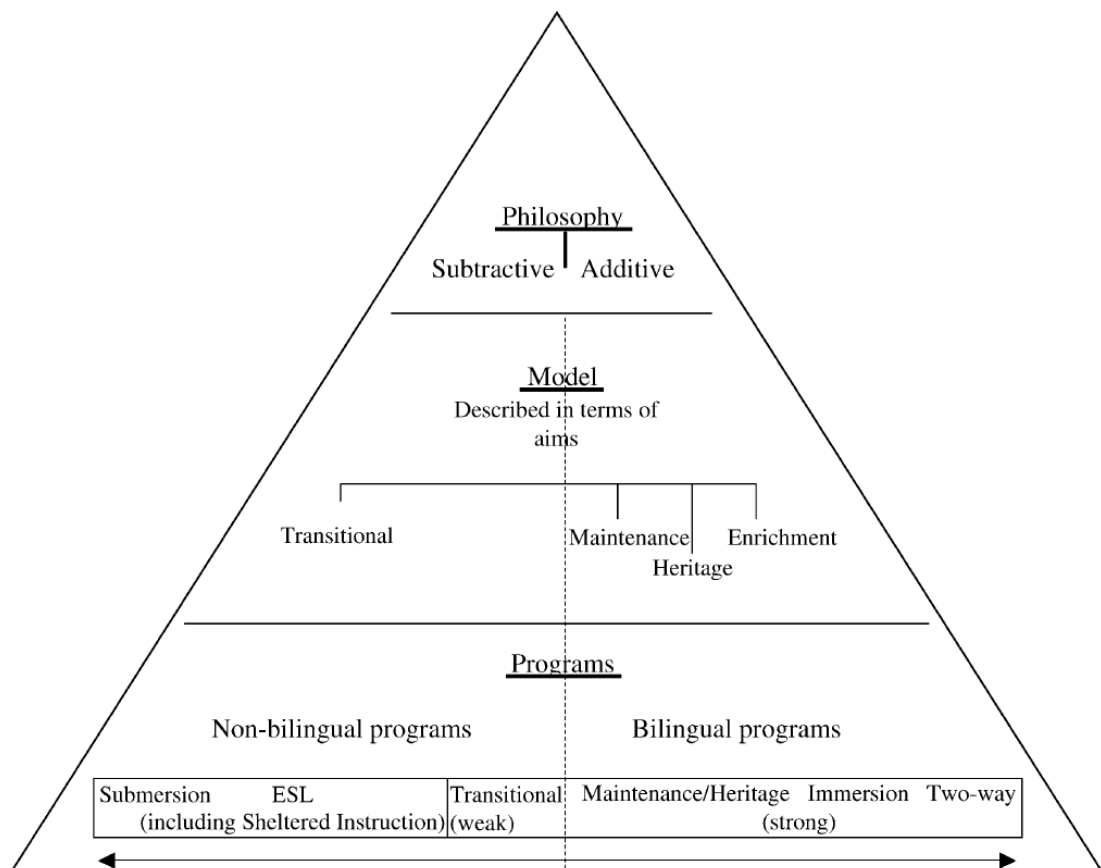
Figure 2-1 Classification system for bilingual education systems, from May (2008)

A more-crisply defined classification of bilingual education types is provided by Ó Riagáin & Lüdi's model of MOI policy - written as a guide for policy makers in Europe. They classify bilingual education strategies using four labels:

- Unilingual – L1 as medium, L2 as subject
- Partial immersion – L1 and L2 as mediums
- Full immersion – L2 as medium, L1 as subject
- Submersion – L2 as medium, no status for L1 (Ó Riagáin & Lüdi, 2003, p. 27)

As with Adamson and Feng's typology, this system classifies MOI policies from the point of view of the learner, with L1 assumed to be a child's first language and L2 being any additional language that the child acquires – usually as part of their formal education. This model is effective in drawing out and describing four distinct approaches to bilingual education from the overwhelming number of practical choices which have to be made when designing and implementing a MOI policy. However, since the categories are defined from the point of view of the language learner, they provide no information about the relative formal statuses of the languages being used as MOI. For example, the description of "partial immersion" could apply equally to a transitional policy in which a minority L1 speaker acquires the official language as their L2, and an enrichment policy, as in Abu Dhabi since 2010 (Kadbeya et al., 2015), where official language L1 speakers use English (their L2) as the MOI for certain subjects.

A further example of an MOI typology, specifically designed to compare the MOI policies of different states is the one used by Albaugh in her comparison of primary MOI policies in African states. This typology ranks MOI policies on a scale from 0 to 10; where 0 represents only European languages are used as MOI in primary school, and 10 only African languages are used as MOI (Albaugh, 2014). I found the idea of using a scale helpful and it informed the final typology which I used to classify both primary and secondary school MOI policy.

In all of these bilingual education MOI typologies a distinction is made between the use of the "standard" language of instruction and MOI policies which accommodate (and in some cases, encourage) the use of other languages. This distinction aligns with the linguistic state-building focus of this study and in my analysis I consider why states would allow languages other than their official language to be used as MOI in schools. In Chapter 5 I describe how I developed a novel typology to describe, and facilitate my comparison of, the MOI policies used by these states.

2.8 Conclusion

In this chapter I presented the concepts of linguistic state-building and linguistic markets which form the analytical framework for this study. I showed how state-school MOI policies can be used as tools to alter or maintain the structure of a

state's linguistic market. Bourdieu developed and applied the concept of the linguistic market primarily to understand contemporary issues of language usage and management within France's domestic linguistic market. I extend this approach to consider how the relative status of languages within national linguistic markets is also influenced by the wider international linguistic market.

I reviewed the literature to show how my approach to the study of MOI policy choice, looking to understand it in terms of the interaction of domestic (national) and international linguistic markets across many cases and also across time, is distinctive. I am focusing on new states, investigating the overall primary and secondary school MOI polices of their school systems, and using an extended version of Bourdieu's concept of the linguistic market to explore whether MOI choices in these new states can be explained as being driven by a linguistic state-building agenda. My global approach to comparing MOI policy enables the literatures from different regions of the world to speak to one another, highlighting similarities between mechanisms driving MOI policy choice which might be missed if they are hidden by region-specific terminology or explanations. The longitudinal aspect of my data allows me to consider how MOI policy choices are influenced by changes to globally promoted models of educational best-practice.

3 Methodology

In this chapter I introduce the qualitative comparative analysis (QCA) methodological approach. I explain how I adapted the QCA methodology to facilitate the longitudinal comparison of my data from many states and describe my case selection strategy, which was an integral part of the QCA process.

3.1 Comparing medium of instruction (MOI) policies

Within the field of the social science, this study sits within the distinct tradition of macro-causal comparative analysis, using *"systematic and contextualised comparison"* to search for shared patterns and types within the characteristics of different countries' social systems, by considering the influence of both historical and contemporary factors (Mahoney & Rueschemeyer, 2003, p. 6; Ragin, 2014, pp. 6,9-12). As a comparative study, these historical and contemporary factors are used to facilitate generalization - the identification and description of broad categories of case types; rather than, as is the case with historical research, to make claims of new insight into the particularities of any one case (Phillips, 2014). By comparing across countries and identifying the conjunctions of internal and external factors which give each country's social systems their unique characteristics; it is possible to identify commonalities and differences in the structure of social institutions (Bourdieu and Passeron, 1977, p. 144).

By comparing the MOI policies of many countries at different points in time I will create a macro-map of MOI policy. This data will allow me to explore MOI trends on a global scale. The shaping of educational policy by the interaction of national and international factors is often alluded to in the literature and can also be referred to by policy makers when justifying MOI choices (Ginsburg et al., 1990; C. H. Williams, 2013). However, as I demonstrated in the literature review, there has yet to be an empirically based study with global reach carried out to support these claims with regard to MOI policy trends. The practice of using policy documents and secondary data to compare the use of languages for teaching and learning is already widely accepted at the regional level (Pavlenko, 2008; Trudell, 2016; Kirkpatrick and Liddicoat, 2017) and such studies have been acknowledged as contributing to understanding the long-term impact that ideologically driven language policies can have on social structures (Cassels

Johnson, 2013, pp. 124–8). Whilst this approach does entail the sacrificing of intimate case knowledge, it enables me to create a picture of the global environment within which the governments of individual states make their decisions on MOI policy which can be used as a basis for comparative analysis. This can lead to a stronger understanding of the motivations driving the establishment of policies which set out norms and expectations for how languages will be used for teaching and learning in schools. Including giving insight into the beliefs (ideologies) held by policy makers as to the relationship between language practices in formal domains and the formation of national identity (A. Jones, 2013). In turn, these policy norms shape the environment in which micro-level decisions over how, or whether, these policies will be implemented in classrooms are taken (Ball, 1998, p. 119,128; Sonntag & Cardinal, 2015, p. 10).

Whilst the way in, and extent to, which MOI policies are implemented and supported in classrooms cannot be assessed from policy documents alone, policies have power, even when they are not wholeheartedly implemented (Cassels Johnson, 2013, pp. 54, 75; Williams, 2013, p. 296). School MOI policies are a tangible expression of a state's formal linguistic identity and the roles that other languages are permitted to play in relation to this in state-controlled domains (Blommaert, 2005, pp. 215–8). As such, they contribute to defining the conditions for successfully accessing the benefits that formal education can potentially bring by legitimating the use of particular languages within schools. This then forms the context against which choices for classroom language use are made by individual educational stake-holders and attitudes towards particular languages and their speakers are formed (Ball, 1993; Tollefson & Tsui, 2014). By tracing patterns of change in the MOI policies of a global sample of cases I am able to see whether there are any patterns evident between changes to globally-promoted models of language-in-education best practice and the MOI policy changes of individual states; or whether MOI policy choices are driven more by long-established patterns of language status within national linguistic markets.

In order to better understand the influence of prior MOI policies on newer ones and to develop a more nuanced understanding of the reality of each case's language-in-education environment, I have used data obtained from detailed

case studies in the academic literature on the extent to which MOI policies have been implemented to inform my development of an MOI policy typology and to investigate and explain inconsistencies and deviant cases within my analysis.

3.2 The logic of case-based, set-theoretic analysis

To operationalize this study and answer my research questions, I collected data from 42 states on how MOI policies have changed over time and the social, historical, political and economic circumstances within which those policies were made (Cooper, 1989, p. 109). In order to organise and manipulate the large quantity of case data generated by this study in a systematic, transparent, and replicable manner I structured my research using the Charles Ragin's qualitative comparative analysis (QCA), which is a case-based, set-theoretic methodology for comparing multiple cases as constellations of characteristics. Because QCA was designed to facilitate the investigation of the interaction of many factors and their relationship to an outcome of interest across many cases, it is recognised as being an appropriate method for investigating policy processes, particularly for "backward-looking research designs which ask for the factors causing a given phenomenon" (Fischer & Maggetti, 2017).

Goertz and Mahoney argue that whilst qualitative and quantitative research techniques share the common aim of analysing causation, the two research traditions rely upon very different logical frameworks to achieve this aim. They attribute the probabilistic language of inferential statistics to the quantitative tradition and the logic of set theory to the qualitative tradition (Goertz & Mahoney, 2012, p. 2). Ragin's analytic technique of qualitative comparative analysis (QCA) exploits explicitly the logic of set theory in order to provide a transparent and replicable technique for *"comparing wholes as configurations of parts"* (Ragin, 2014, p. 84). The formally structured nature of QCA has the potential to enable social science researchers to apply a within-case analysis approach (traditionally the domain of the descriptive, qualitative analysis of a very small number of individually selected, cases) to a much larger sample of cases, whilst retaining the ability to carry out cross-case (typified by the statistical analysis of a large number of cases) variable oriented research analysis (Goertz and Mahoney, 2012, pp. 88–89).

As well as using different logical frameworks, Goertz and Mahoney hold that qualitative and quantitative research traditions have different objectives, which require different sampling strategies. Quantitative research strategies use randomly selected representative samples to generate findings which can be generalised to a wider population. In contrast, the goal of qualitative research strategies is to find an explanation which applies to all of the cases within the sample but which is not intended to be generalizable to cases outside of this group (Goertz and Mahoney, 2012, pp. 41–42, 46). Due to this difference, scope conditions play an important role in QCA analysis, not only defining the characteristics of the cases being compared, by also acting as a statement of necessary conditions for any potential relationships found between case characteristics and the outcome of interest. I describe and justify the scope conditions which I used to select cases for this study in the next chapter.

The set-theoretic logic of comparison and causal analysis that is employed, implicitly by many standard qualitative techniques, and explicitly by Ragin in his method of qualitative comparative analysis is rooted in the methods of experimental inquiry described by John Stuart Mill in his 1843 book *A System of Logic*. In this, Mill set out several methods of experimental inquiry to guide researchers (both in the natural and the social sciences) through the inductive analysis of data, gathered from observation or experiment, in order to derive an association between case characteristics and the occurrence of a phenomenon of interest (Mill, 1843, pp. 210–211). The basis of these research methods were the Method of Agreement (searching for a common characteristic between two very different cases which both display the outcome of interest) and the Method of Difference (searching for the essential difference between two very similar cases, one of which displays the outcome of interest and the other of which does not) (Mill, 1843, pp. 211–216). Mill also offered a variant of these methods, called the Joint Method of Agreement and Difference, where: *"If two or more instances in which the phenomenon occurs have only one circumstance in common, while two or more instances in which it does not occur have nothing in common save the absence of that circumstance, the circumstance in which alone the two sets of instances differ is the effect, or the cause, or an indispensable part of the cause, of the phenomenon". (Mill, 1843, pp. 219–221)*

By examining positive and negative cases together, this Joint Method had the potential of delivering more reliable inferences that the method of agreement alone. Mill presented his methods of experimental inquiry using the assumption that every effect has one cause and every cause one effect. However his description of these methods is set within a discussion of the possibility that a cause *"may consist of an assemblage of conditions"* and that *"it is not true that the same phenomenon is always produced by the same cause"* (Mill, 1843, p. 239). With his joint method of agreement and difference, which compares both positive and negative cases, and his recognition of conjunctural causation (1843, pp. 204–207) and equifinality (1843, pp. 238–242) Mill provided a framework for logical comparative inquiry which Charles Ragin built on with his development of Qualitative Comparative Analysis.

3.3 Qualitative comparative analysis (QCA)

Ragin first outlined the processes of qualitative comparative analysis (QCA) in his 1987 book, *The Comparative Method: moving beyond qualitative and quantitative strategies* (Ragin, 1987), offering a strategy for gaining a greater understanding of the social world by making systematic case-oriented comparisons between large numbers of countries. One of Ragin's core arguments as to the suitability of using the language and logic of set-theory to analyse social science data is that social science theories are generally expressed verbally, in sentences rather than equations, and that these sentences describe sets and the relationships between them (Ragin, 2008, p. 13). In the QCA approach truth-tables are used to mimic the detailed attention paid to the complex interaction of case characteristics in traditional qualitative work. These truth-tables are constructed from conditions which are considered, either for theoretical reasons or through observation, to have a connection to the outcome of interest (Berg-Schlosser & Meur, 2009). This description of cases in terms of multiple set-membership enables a close link to be kept between theoretical concepts and the analytical process (Schneider & Wagemann, 2012, p. 24).

Since the publication of *The Comparative Method* the technique of QCA has been refined and developed and has been applied to many different areas of research. The use of QCA is already well established in the fields for which it was originally developed – historical sociology and comparative politics. It is also gaining

popularity as a technique for case-based analysis and monitoring and evaluation in the fields of economics, development, and management studies (Haake & Schneider, 2022; Rihoux et al., 2013; Scholz et al., 2016). There have been initiatives to promote the use of QCA in education research, but it is yet to be commonly used at any level of analysis (Bingham et al., 2019; Cilesiz & Greckhamer, 2020; Farrell & Marsh, 2016; Glaesser & Cooper, 2012).

QCA is not just a method for organizing and processing data, it is a way of looking at the social world and asking questions about it, which is distinct, and complementary to, the probabilistic outlook of the variable-oriented researcher. QCA is a set-theoretic method which describes the properties of cases in terms of their membership to sets and uses Boolean analysis both to offer causal interpretations of phenomena and to express empirical data in as concise a form as possible (Schneider and Wagemann, 2012, pp. 3, 8–9). Unlike statistical methods which are driven by probability theory, QCA, like most qualitative methods (whether explicitly acknowledged, or not), use propositional logic and set-theory to analyse data and generate results. This privileges the investigation of patterns associated with particular combinations of factors over measuring the net effect of individual variables (Goertz and Mahoney, 2012, p. 17). By using formalized mathematical techniques QCA is able to offer a case-based approach to data analysis which can be applied across multiple cases, allowing an investigation of complex interactions of case characteristics which would not be possible using standard regression analysis techniques (Rihoux & Lobe, 2015, p. 1042). In the next part of this chapter I use a worked example to outline the technical processes of the qualitative comparative analysis research cycle using crisp-set data.

3.4 The process of qualitative comparative analysis

In qualitative comparative analysis cases are described in terms of their belonging or not belonging to a set of cases which share a characteristic or combination of characteristics. The first steps taken when using the QCA methodology are to define the outcome of interest and to select cases for comparison. The selection of cases is not randomised, instead cases are included in the analysis if they fulfil the scope conditions of the study. Case characteristics which may act as possible causal conditions also need to be

selected. This selection can either be theory driven, to test an existing hypothesis or, if the goal is theory generation, potential causal conditions can emerge from a close inspection of the cases. Causal and outcome conditions can be derived from qualitative or quantitative data; in practice, a combination of these approaches is often used. It is necessary to have a complete set of causal conditions for every case that is to be included in the analysis. Once selected, the empirical data of causal and outcome conditions is calibrated. This process converts empirical data into set membership scores which indicate the qualitative distinction between belonging or not belonging to a set. Conditions can be calibrated either as binary conditions for use with crisp-set QCA (csQCA), or as a combination of crisp and fuzzy conditions if fuzzy-set QCA (fsQCA) is being used. In either variation, a set membership score of 0 indicates that the case is not a member of the set and a score of 1 that it is a full member of the set. In crisp-set QCA characteristics are binary – a case either possesses the characteristic, or it does not – there are no shades of grey or "maybes" (Ragin, 2014, pp86-7). In fuzzy-set QCA fractional set-membership scores are also used to give an indication of degree of membership to a set (Ragin, 2008, pp. 30–33). Whichever variant of QCA is used, the process of calibration should not be carried out mechanically. In particular, the choice of cut-off point (which separates set-members from non-members) should be carefully justified.

Once the data has been calibrated, each case is assigned to a row in a truth-table based on the conjunction (combination) of causal condition set memberships that it possesses. Each row of the truth-table is then assigned a set membership score for the outcome condition which is derived from the outcome set membership scores of all of the cases within that particular row. If a row is given an outcome score of 1 it indicates that the combination of causal conditions that that row represents are considered to be a sufficient cause of the outcome of interest (Schneider and Wagemann, 2012, p. 104). This process clusters together positive cases with similar characteristics and can reveal incidences of equifinality – the existence of multiple possible pathways associated with the outcome of interest. At this point the data can be inspected to identify any causal conditions which appear to be necessary for the outcome. Rows which are sufficient for the outcome are then collected together to create a Boolean expression which can be simplified by logical minimization. The strengths of any

identified relationships of necessity or sufficiency are evaluated mathematically in terms of their consistency and coverage (parameters of fit), and also theoretically in terms of how well they explain the case data.

The parameters of fit are used to give a numerical measure of how well the solution, or individual terms within it, describe the group of cases being analysed. They are not analogous to the confidence interval or p-value measures of statistical regression analysis, which evaluate the degree to which findings may be used to make predictions about the properties of the wider population from which a randomised sample of cases has been taken (Schneider and Wagemann, 2012, chap. 5). For a claim of a set theoretic relationship of sufficiency, consistency measures how well the claim matches the empirical data, and coverage measures the proportion of incidences of the outcome of interest which are covered by the claim. The consistency of a claim of sufficiency is adversely affected by contradictory truth-table rows. If a condition is considered to be necessary for the outcome, then consistency measures the validity of this claim, whilst coverage assesses the relevance or triviality of the claim (Ragin, 2008, pp. 44–45). Taken together these parameters of coverage and consistency can be used to evaluate the reliability and usefulness of any claims of necessity or sufficiency which are obtained through a qualitative comparative analysis.

QCA uses the logic of Boolean algebra both as a language to describe cases and as a tool to sort and compare cases in order to find commonalities or differences between them. Using Boolean algebra also allows for the identification of variation in case characteristics which is irrelevant to the outcome of interest, leading to simpler, more parsimonious solutions. Rather than having the aim to being generalisable to a wider population, findings generated by a QCA are designed to apply to all of the cases included within the analysis (Goertz and Mahoney, 2012, p. 46).

Whilst the processes of qualitative comparative analysis are straight-forward and could be carried out mechanically, the effective use of QCA depends upon access to high-quality information sources and the careful and theoretically informed selection, definition, and calibration of possible causal and outcome conditions from these sources (Thomann & Maggetti, 2020). Each step of the QCA process

should be seen as part of a thoughtful, iterative, dialogue with the case data (Rihoux and Lobe, 2015, pp. 1046–7). I use the theoretical framework I outlined in the previous chapter to guide case selection (defining the study's external validity) and the selection and calibration of case characteristics and outcome types (to improve internal validity) in order to investigate whether the MOI policy choices of new states can be explained in terms of adapting linguistic state-building strategies to fit in the context of a wider, changing, international linguistic market.

3.4.1 Relationships of necessity and sufficiency

QCA is used to identify two types of relationship between causal conditions and outcomes - necessity and sufficiency. A necessary condition is a condition which forms a superset of the set of cases which show the outcome of interest. A sufficient condition forms a sub-set of the set of cases which show the outcome of interest. These relationships are illustrated in the Venn diagrams below (Figure 3-1).

Necessity: Cases with the necessary condition, N, form a superset of the cases which show the outcome of interest.

$N_{(X)}$
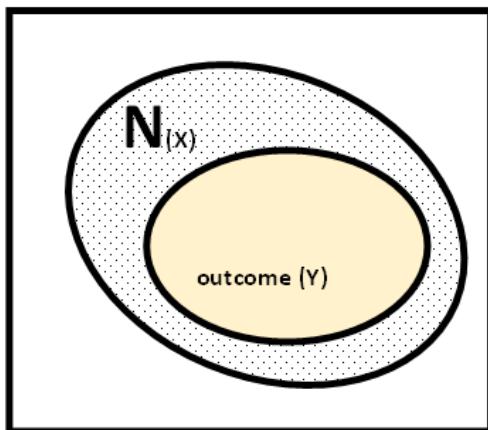
outcome (Y)

Sufficiency: Cases with the sufficient condition, S, form a sub-set of the cases which show the outcome of interest.

outcome (Y)

$S_{(X)}$
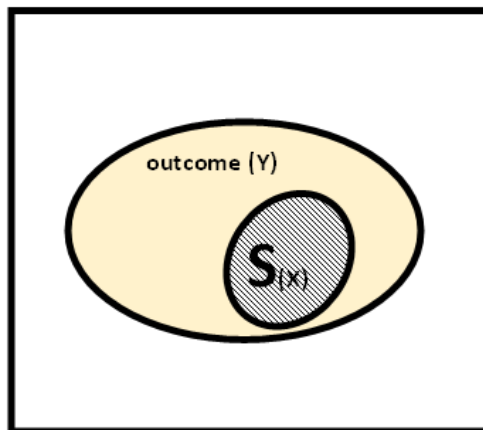
Figure 3-1 Venn diagrams showing relationships of necessity and sufficiency

A cause (X) is deemed to be necessary if the outcome (Y) only occurs when the cause is present (though it is possible that the outcome may not occur when the cause is present). A cause is sufficient if the outcome always occurs when the cause is present (though the outcome may occur when the cause is absent). A cause is necessary and sufficient if the effect always occurs whenever the cause

is present and never occurs when it is absent (Goertz and Mahoney, 2012, chap. 2; Schneider and Wagemann, 2012, chap. 3).

When using real-world data, relationships between causal conditions and outcomes are rarely perfect. Figure 3-2 shows this. The causal condition S* is not a perfect sub-set of the outcome, so S* is not sufficient for the outcome. However, if most of the cases in S* are also members of the outcome set (that is, S* is a near sub-set of the outcome set) it may be worthwhile to pay attention to this relationship of near-sufficiency. QCA uses parameters of fit to evaluate the usefulness and reliability of near-sufficient and near-necessary relationships (Ragin, 2008, pp. 44–5; Schneider and Wagemann, 2012, chap. 5).
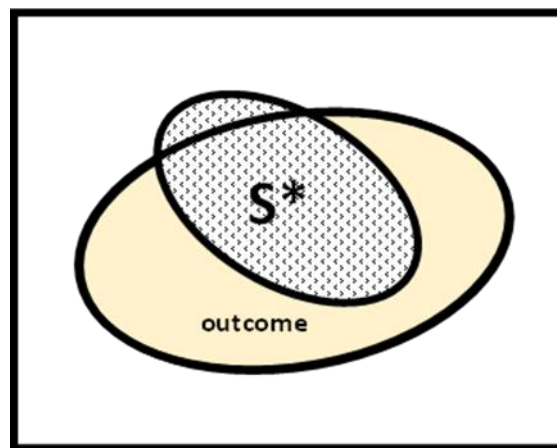
Figure 3-2 Example of a relationship of near-sufficiency. Most, but not all, of the cases with the characteristic S are also members of the outcome set*

For the sake of clarity, in this chapter I describe logical relationships in terms of "cause" and "outcome". However, as the well-known caution regarding statistical analysis goes, *"correlation does not imply causation"* so I will not be employing this language in the analysis of my data. Rather, I will refer to patterns of case characteristics identified as being associated with the outcome of interest.

3.4.2 QCA notation conventions

While the 0 and 1 notation is frequently used in data frames and truth-tables, in written discussions of QCA findings and when presenting Boolean equations, upper- and lower-case letters are used to distinguish between set-membership

and non-set-membership, respectively. The tilde symbol may also be used to indicate the negation of a property. So, for example, membership to the set of rich countries may be indicated by "1", "RICH", or "R", whilst non-membership can be indicated by "0", "rich", "r", or "~RICH". Non-membership is generally voiced as "not rich".

3.4.3 Conjunctions and disjunctions

Causation in the social world is complex, so there tend to be few individual conditions which, acting by themselves, can be considered as being sufficient (or necessary) causes of an outcome of interest. It is more common for a combination of conditions to be identified as being sufficient (or necessary) for the outcome of interest. In addition, there may be more than one pathway or mechanism (combination of conditions) which leads to the outcome of interest – a phenomenon which is referred to as equifinality (Mackie, 1965, p. 245).

The analytical mechanism of QCA is driven by Boolean algebra: the algebra of logic and sets. This enables a QCA user to identify these more complex relationships of sufficiency or necessity which involve more than one causal characteristic. QCA uses two types of logical combinations of conditions – conjunctions and disjunctions – to make statements about the relationships between case characteristics and the outcome of interest (Ragin, 2014, chap. 6).

Conjunctions are two or more conditions joined by the logical operator AND (written as *) which, acting together, are associated with the outcome of interest. Conditions within a conjunction may be described as being present or absent; and the absence of a condition is potentially as significant as its presence. All of the values of the conditions in a conjunction must be present for it to be true. Examples:

J*K =>Y   The conjunction J AND K is sufficient for the outcome Y

J*k => Y   The conjunction J AND not K is sufficient for the outcome Y

Disjunctions are two or more conditions joined by the logical operator OR (written as +) and represent different possible pathways to the outcome of interest. As

with conjunctions, the conditions may be described as being present or absent. Within QCA one or both of the values of the conditions in a disjunction must be present for it to be true. Examples:

M + N => Y   Either M OR N are sufficient for the outcome Y

m + N => Y   Either not M OR N are sufficient for the outcome Y

More complex logical statements may be formed by combining logical terms. In QCA this is commonly done when conditions for sufficiency are extracted from truth-tables. Example:

M + J*k => Y   Either M OR J AND notK are sufficient for the outcome Y

3.4.4 Analysis of necessity

In QCA necessary and sufficient relationships need to be analysed separately and care must be taken to ensure that there is no contradiction between any claims of necessity or sufficiency made. A condition (X) is considered to be necessary for an outcome (Y) if, for every case, the value of X is greater than, or equal to, the value of Y (X ≥Y). This strength of this relationship of necessity can be measured using the parameter ConN (Schneider and Wagemann, 2012, p. 140). With data calibrated as crisp-sets, for an outcome Y and a causal condition X:

ConN = number of cases where X=1 and Y=1
         number of cases where Y=1

The output of ConN ranges between 0 and 1. If a characteristic (X) is perfectly necessary for an outcome (Y), then X will always be present when Y is present and ConN = 1. Sometimes it is useful to consider relationships of near-necessity. A characteristic can be described as near-necessary if it is nearly always present whenever the outcome of interest occurs. For a characteristic to be considered as near-necessary, ConN ≥ 0.9. Any claims of necessity or near-necessity must also be evaluated using two additional parameters, coverage (CovN) and relevance of necessity (RoN) (Schneider and Wagemann, 2012, pp. 144–147,

235–236). CovN and RoN help to identify trivial necessary conditions. That is, conditions that are present in most negative cases as well as in most positive cases – this is an indication that the condition may not be a direct part of the causal mechanism which leads to the outcome.

CovN = $\dfrac{\text{number of cases where X=1 and Y=1}}{\text{number of cases where X=1}}$

RoN = $\dfrac{\sum (1 - x_i)}{\sum (1 - \min (x_i, y_i))}$

The outputs of both of these parameters range from 0 to 1. The lower the output, the more likely it is that the condition (or disjunction) is a trivial necessary condition. Case-knowledge should also be used to assess the relevance of any claims of necessity to the outcome of interest.

3.4.5 Using truth-tables to explore relationships of sufficiency

In QCA case data is sorted using truth-tables to identify conjunctions (combinations) of causal factors which, occurring together, are sufficient to cause the outcome of interest. Or, to state this claim more cautiously, are consistently associated with the outcome of interest. A truth-table serves a similar purpose to a Venn diagram – it sorts cases based on the sets to which they belong. Cases which have the same combinations of set memberships will be allocated to the same section of a Venn diagram or to the same row of a truth-table. The advantage of using a truth-table to do this is that a truth-table is easier to read and to extract data from when more than 2 or 3 sets are involved.

I use a small exemplar dataset (Table 3-1) to illustrate the processes which I describe in this section. The data set consists of 20 cases, which are displayed in a data-frame, with each case's data displayed in its own row. For each case we have information about three potential causal factors (D, E and F) and the outcome of interest, Y. The data has been calibrated as crisp-sets, with 1 indicating that the condition is present, and 0 that it is absent. By inspection, we can see that there appear to be no necessary conditions. None of the causal factors are consistently present (or absent) for all of the positive cases. In order to identify relationships of sufficiency, the case data needs to be transferred to a

truth-table. Unlike a data-frame, which has as many rows as there are cases, the size of a truth-table is controlled by the number of causal factors being used. Number of rows = 2^n, where n = number of causal factors. In this example there are 3 causal factors, so the truth-table has 8 rows. Each row represents one of the eight possible configurations of the presence or absence of the causal conditions. In this truth-table (Table 3-2) I have used upper case letters (D, E, F) to represent a condition being present and lower-case letters (d, e, f) to represent the absence of a condition.

case	causal factors			outcome Y
	D	E	F	
1	0	1	1	1
2	1	0	0	0
3	0	1	0	0
4	0	1	1	0
5	1	1	0	1
6	1	1	1	1
7	1	0	1	0
8	0	1	0	1
9	0	1	0	0
10	0	0	1	0
11	0	1	1	1
12	1	1	0	1
13	0	1	1	1
14	1	0	0	0
15	1	0	1	1
16	0	1	1	1
17	1	0	1	1
18	1	1	0	1
19	1	1	1	1
20	1	0	1	0

Table 3-1 Exemplar data set: a data-frame containing 20 cases.

row	causal factors			case counts			row consistency ConS	row sufficiency for Y
				total	Y = 0	Y = 1		
1	D	E	F	2	0	2	1	1
2	D	E	f	3	0	3	1	1
3	D	e	F	4	2	2	0.5	0
4	D	e	f	2	2	0	0	0
5	d	E	F	5	1	4	0.8	1
6	d	E	f	3	2	1	0.33	0
7	d	e	F	1	1	0	0	0
8	d	e	f	0	0	0	?	?

Table 3-2 Exemplar truth-table: an 8-row truth-table formed from 3 case characteristics.

With crisp data, it is a straightforward process to allocate cases to their correct truth-table rows as each case will have full membership to just one row and will not be a member of any other rows. Row membership is not dependent upon whether or not the case displays the outcome of interest. For example, cases 3, 9 (Y = 0) and 8 (Y = 1) from the data-frame are all allocated to row 6 (d,E,f) of the truth-table (Ragin, 2008, chap. 3; Schneider and Wagemann, 2012, pp. 96–103).

Once cases have been allocated to their correct truth-table rows we need to evaluate whether the empirical data indicates any relationship of sufficiency between the different conjunctions of case characteristics represented by each row and the outcome of interest, Y. By inspection we can see that rows 1 and 2 contain only positive cases, so both conjunctions can be considered as being sufficient for the outcome, In contrast, rows 4, and 7 contain only negative cases, so these conjunctions are not sufficient for the outcome. Rows 3, 5 and 6 contain a mixture of positive and negative cases, so we need to evaluate the row consistency, ConS, in order to determine the degree to which the conjunction of characteristics represented by the truth-table row can be considered as being sufficient for the outcome. For csQCA row consistency is calculated by dividing the number of positive cases in the row by the total number of cases in the row.

ConS = <u>number of cases in the row which display the outcome of interest</u>
          total number of cases in the row

ConS can take values between 0 (none of the cases in the row display the outcome of interest) and 1 (all of the cases in the row display the outcome of

interest). In his early writing on the interpretation of truth-tables, Ragin originally suggested that rows which contain a mixture of positive and negative cases should be considered as representing possible (more negative than positive cases) or likely (more positive than negative cases) paths to the outcome of interest (Ragin, 1995, pp. 184–186). Current best-practice for QCA recommends that row consistency should be at least 0.75 for a row to be considered as being sufficient for the outcome, though the quality and nature of the data being analysed should be taken into account when making this decision (Schneider and Wagemann, 2012, p. 129). For this example I am using the cut-off ConS ≥0.8, so row 5 (d, E, F) can be considered as sufficient for the outcome Y. The presence of a large number of number of inconsistent (contradictory) truth-table rows can be a symptom of a poorly designed analysis where the characteristics of the truth-table do not fully explain the outcome of interest (Schneider and Wagemann, 2012, pp. 120–123). Rows with mid-level values of ConS (such as row 3) are more problematic that those with values of ConS close to 1 or 0. When using fuzzy-calibration PRI scores (Proportional Reduction in Inconsistency) need to be used to identify and exclude logically inconsistent rows which can be considered, mathematically, as being sufficient for both $Y = 1$ and $Y = 0$ (Schneider and Wagemann, 2012, p. 330).

Once the row consistencies have been calculated, all of the rows which are sufficient for the outcome can be grouped together to form a Boolean expression which represents, for the analysis in question, all causal pathways identified as being sufficient for the outcome of interest. In this example, these are rows 1, 2 and 5, giving the primitive Boolean solution:

D*E*F + D*E*f + d*E*F => Y

Before further analysis, this statement of sufficiency should be assessed in terms of its consistency and coverage. The formula for row consistency can be adapted to calculate solution consistency. This solution covers a total of 10 cases, 9 of which are positive. Therefore, solution consistency, ConS = 9/10 = 0.9. Solution consistency will always be greater than, or equal to, the cut-off chosen for row consistency.

The other parameter used to describe the quality of a statement of sufficiency is a measure of the coverage of the solution, CovS. This measures the proportion of positive cases which are covered by the solution.

CovS = <u>number of positive cases in the solution</u>
       total number of positive cases in the sample

Coverage, like consistency, ranges in value from 0 (no positive cases are captured by the solution) to 1 (all positive cases are captured by the solution), and it can be calculated for individual rows within a truth-table, or individual conjunctions within a Boolean solution, or for the solution as a whole. This solution covers ("explains") 9 of the 12 positive cases in this data set, giving a solution coverage = 9/12, CovS = 0.75

The most important parameter for assessing the quality of a relationship of sufficiency is consistency, which should be as high as possible – indicating that there are few negative cases also captured by the solution. A solution with low consistency does not discriminate well between positive and negative cases. Coverage is of secondary importance to consistency and there is no minimum acceptable value of CovS. Whilst a solution with high coverage is desirable – because it will explain a larger number of positive cases – a solution with low coverage may provide important insight into the processes taking place in the cases which it covers (Schneider and Wagemann, 2012, pp. 129–139). Strategies for improving solution consistency include; reviewing the sampling conditions to ensure that all cases included in the study are comparable; adding additional conditions to the truth-table to split up the cases in contradictory rows; and reviewing outcome and case characteristic definitions and calibrations. These strategies are all commonly used within the cyclical and iterative process of using QCA strategies, theoretical ideas, and case data to investigate relationships between case characteristics and outcomes (Schneider and Wagemann, 2012, pp. 120–123). In chapters 5, 6 and 7 I include discussions of how I balanced this methodological quest for high consistency and coverage with using QCA to produce theoretically useful solutions which allowed me to analyse my case data in a meaningful manner.

3.4.6 Simplifying Boolean solutions

Boolean algebra not only provides a clear notation for displaying paths of causation, it can also be used to simplify the way in which this information is presented. This process in known as minimization. Simplifying a Boolean solution will change neither the consistency nor the coverage of the solution but will clarify relationships between causal conditions and the outcome by identifying and eliminating factors which are irrelevant to the outcome of interest. In a sophisticated analysis the process of minimization will involve the consideration of evidence from theories and contradictory rows, but its mechanical, operating principle is: *"If two Boolean expressions differ in only one causal condition yet produce the same outcome, then the causal condition that distinguishes the two expressions can be considered irrelevant and can be removed to create a simpler, combined expression." (Ragin, 2014, p. 93)*

Using this principle, we can simplify the Boolean solution generated from this section's example by looking for pairs of conjunctions which fulfil Ragin's criteria. In the Boolean solution D*E*F + D*E*f + d*E*F => Y the first and second conjunctions (D*E*F, D*E*f) differ in just one causal condition, so they can both be represented by the conjunction D*E. In the language of sets, D*E*F and D*E*f are subsets of D*E and D*E is referred to as a "prime implicant". By the same process, the first and third conjunctions (D*E*F, d*E*F) can be represented by the superset E*F. The simplified Boolean solution is: D*E + E*F => Y This can be interpreted as, the presence of either D and E, or E and F is sufficient for the outcome to occur. When correctly executed, every conjunction in the primitive solution will be included within at least one prime implicant in the simplified solution. This type of simplification, which does not stray beyond the empirical data, only using truth-table rows that are coded as being sufficient for the outcome, produces what Ragin referred to as a conservative solution (2014, pp. 105–6).

3.4.7 Using logical remainders as simplifying assumptions

In the exemplar truth-table (Table 3-2) there is one row (d*e*f) which contains no cases. Since there is no empirical data to indicate if such a combination of factors is sufficient for the outcome of interest (Y) it is coded as "?". "Empty" rows in a truth-table are a symptom of limited diversity within the dataset and have three

sources: arithmetic, clustered, and impossible. Arithmetic remainders occur when there are more rows than there are cases, this happens when a large number of causal factors are applied to a small number of cases. Case characteristics in social research are unlikely to be distributed at random and certain characteristics may be correlated, this limited diversity leads to clustered remainders – caused by cases clustering together over just a few truth-table rows. Limited diversity is not a failing of QCA methodology, rather it is a commonly occurring phenomenon within the social world which the QCA approach highlights. The final source of empty rows, impossible remainders, occur when two, mutually exclusive, factors are used to create the truth-table. If, for example, if countries were classified using the factors "RICH" and "POOR", it would be expected that any row involving the conjunction RICH*POOR should be empty as such a combination is logically impossible and would form an "untenable assumption" if used to simplify a Boolean solution (Schneider and Wagemann, 2012, pp. 151–157; Ragin, 2014, pp. 104–118).

Using the guidelines for Ragin's QCA standard analysis (Ragin, 2008, pp. 160–175) it is possible to create a simpler, more parsimonious, solution by coding some of the logical remainder rows as being sufficient for the outcome. In effect, making the assumption that, did a case with such a combination of characteristics exist, it would display the outcome of interest. A researcher using QCA should recognise this as an act of inference – making assumptions about the properties of counterfactuals - cases for which there is no empirical data (Thomann and Maggetti, 2020, p. 370). The process of Boolean simplification is used to combine any selected counterfactual rows with the rows representing empirical data from the conservative solution to create an even simpler solution. This can be done as an automated operation using the *QCA for R* package (Dusa, 2019) to search for the most mathematically simple, or parsimonious, form for a Boolean solution.

Alternatively, the logical remainder rows to be used as simplifying assumptions may be purposefully selected. This approach can lead to more logically tenable simplifications by: excluding the use of impossible remainders; ensuring that any existing statements of necessity are respected; and selecting rows based on directional expectations - a theory guided "hunch" (not contradicted by existing empirical evidence) about how the presence (or absence) of a single condition

will affect the outcome of interest. This type of theory-guided simplification results in an "intermediate" solution (Schneider & Wagemann, 2012, p. 168) (Ragin, 2014, pp. 104–113).

QCA is still a relatively young methodology and standards of best-practice are still being debated and established for how QCA should be used, characteristics calibrated, and simplifying assumptions made (B. Cooper & Glaesser, 2016; Schneider & Wagemann, 2016). I have used QCA's methodological flexibility to develop an analytical approach which best represents my case data and reveals patterns within it. Where I have been faced with making a decision over which strategy I should take at a particular point in my analysis, rather than demonstrating my ability to execute complex analytical techniques, I have favoured those approaches which best preserve the identities of my cases (Rihoux and Lobe, 2015). All data calibration and analysis has been carried out using the QCA for R package (Dusa, 2019). In the next part of this chapter I describe the analytical choices which I made.

3.5 Incorporating the effects of time into QCA

To investigate how MOI policy choices have changed over time I needed to consider the concept from different perspectives. For each individual country I wanted to know how their MOI policy had evolved from their date of independence onwards. I also wanted to investigate whether the MOI policies of independent states were influenced by changing globally felt trends - whether they take the form of the increasing status given to particular languages within the international linguistic market, or the promotion of models of educational best-practice by influential transnational actors. These concepts of "age of state" and "era" may also interact. In addition to considering the influence of "when" (whether in terms of age of state or era) a policy is adopted, I also wanted to take into account how past events or practices might influence current MOI practices.

A recognised limitation of standard QCA is that it is insensitive to concepts of time, which restricts its suitability for analysing the trajectory of a policy process across time (Fischer and Maggetti, 2017). In order to generate meaningful findings, a researcher needs to consciously choose to include strategies within their QCA research design which capture aspects of time or temporality relevant

to their research (Schneider and Wagemann, 2012, sec. 10.3). In order to explore patterns and trends in MOI policy choice I needed to be able to take into account both when an MOI policy change was made, and also the influence of past events on these choices. I have used two techniques to integrate the effects of time on MOI choice. To take into account the changing global context ("era" or "zeitgeist") within which MOI policy choices are made (Falleti & Lynch, 2009), I compare my cases at six different points in time: in 1965, 1975, 1985, 1995, 2005 and 2015. The possibility of this longitudinal approach is suggested by Schneider and Wagemann (2012, pp. 265–6) and it is described by Verweij and Vis (2021) as "Multiple QCA's, Different Time Periods": where the data on each case (the changing MOI policy of a that particular country) is segmented at specific time points to produce multiple sub-cases that can be compared at each of these time points. According to Verweij and Vis, this strategy has only been used in empirical research a few times, and none of the examples which they give are from the field of comparative education. In my analysis I use the Boolean solutions from this longitudinal series of truth-tables to explore changes over time to the configurations of case characteristics associated with each of the MOI policy outcome types. I also identify and interpret patterns of MOI trajectory – how particular states have moved between, or towards, the different MOI policy types.

Using countries, rather than individual MOI polices, as cases in this longitudinal approach served to emphasise patterns within the development of each state's use of language-in-education policy to shape the formal linguistic identities of its citizens – a key objective of this study. A limitation of this approach is that earlier waves of analysis have fewer, and less diverse, cases. This is an unavoidable consequence of my case selection strategy which was designed to capture countries with a wide range of independence dates and pre-independence histories so that I could investigate whether there is a relationship between when a state became independent and the MOI policies that it adopts.

The second strategy I used was to include in the QCA truth-tables indicators to represent the continuing influence of past events and conditions on MOI choice. I did consider using the two-step QCA procedure as part of this strategy (Schneider, 2019). In this procedure causal conditions are divided into remote (contextualizing, causally distant) and proximate causal factors. An analysis of

necessity is first carried out to determine the relationship between the remote factors and the outcome of interest. The output from this analysis is then used as a factor in a second QCA including the proximate factors. However, exploratory analyses revealed that there were few nontrivial, theoretically meaningful, remote necessary conditions, so I abandoned the use of this strategy. This being said, the influence of two-step concept of distinguishing between remote and proximate causal conditions can be seen in the way in which I built truth-tables using a combination of "inherited" and "current" factors to accommodate consideration of the influence of pre-established patterns of language status and usage on MOI choice.

In order to make the solutions for each outcome type comparable across waves, I developed a standardised, theory guided, pattern for building truth-tables using similar case characteristics for each wave of analysis for that outcome type. This enabled me to track how characteristics (particularly historical ones) changed in their importance as explanatory factors and to relate the patterns revealed by the truth-tables to the analytical framework of this study (Greckhamer et al., 2018). Together, these two strategies allow me to use QCA to scaffold a systematic, theoretically relevant, comparison of my longitudinal case data. My development of this strategy can be seen as making a contribution to the methodological QCA literature.

3.6 From case data to case characteristics and outcome types

The data for study was collected from a wide range of documentary sources. The selection and calibration of case characteristics and MOI policy outcome types used to build the truth-tables for analysing the data were developed through an iterative process of reading, summarising, and comparing data from the different cases and investigating potential patterns by constructing exploratory truth-tables. This process was informed by Braun and Clarke's recommendations for the thematic analysis of qualitative data (2006) which I found to be helpful in operationalizing recommendations of best-practice for using QCA to build models from data (Greckhamer *et al.*, 2018; Thomann and Maggetti, 2020). My initial reading of the data and collection of comparable information on case characteristics was, driven by concepts taken from the literature on linguistic state-building and globalised influences on MOI policy. As I grew more familiar

with my cases, I used an inductive approach to modify previously selected characteristics and to define and create new ones. This inductive approach was particularly important for the development of the outcome typology which I use to group and compare MOI policies (see chapter 5). It also allowed me to use my deeper knowledge of the conditions surrounding the MOI policy strategies of countries with which I was already familiar to guide my treatment of data from countries that were unknown to me before I began work on this study. I used this strategy of making inferences from the familiar to the unfamiliar to strengthen my interpretation of QCA output in the discussion chapters.

Given the wide time period covered by this study, I had to ensure that the sense of any concepts which I defined would transfer across time as well as between states. This wide time range also restricted the amount and reliability of the data which I had access to, particularly for policy decisions made before the EFA-era. In the analysis chapters I discuss the compromises that I had to make in the way in which I used empirical characteristics to represent theoretical concepts. The two major issues that I had to address were deciding how to calibrate my data and managing the size of truth-tables.

In order to create case characteristics that can be used in QCA, indicators obtained from case data need to be calibrated and transformed into set membership scores. To do this each characteristic needs to be clearly described and criteria for set membership needs to be established. These criteria act as recognition of the existence of relevant and irrelevant variation across a variable (Ragin, 2008, p. 33). If a QCA is to deliver a meaningful analysis of case data, then the process of defining outcome sets and case characteristics by calibrating data cannot be applied mechanically (Ragin, 2008, Chapter 4). For the binary (yes/no) crisp-sets used in this analysis, the key calibration act is the choice of the cut-off point which distinguishes between cases which are members of the set and those which are not. There needs to be a qualitative distinction between belonging and not-belonging to a set. Any type of indicator may be calibrated to create a characteristic that can be used in a qualitative comparative analysis. The calibration of characteristics should be justified by drawing on empirical or theoretical knowledge external to the data-set, and not be based solely on arithmetical descriptors of the indicator, such as its mean, though these may be

used to inform the calibration process (Schneider and Wagemann, 2012, pp. 32–35) (Greckhamer et al., 2018). After exploring different methods of calibrating both case characteristic and outcome sets, I decided that using crisp-set calibration for this study would allow me to most clearly identify significant differences between cases, track changing patterns of outcome set membership for cases across the multiple waves of analysis that I carried out, and facilitate the investigation of inconsistencies in solution memberships.

A criticism levelled against crisp-set qualitative comparative analysis is that detail is lost when cases are assigned a binary set membership score. To remedy this, Ragin proposed the use of fuzzy-set calibration to add a quantitative dimension to the qualitative property of set membership by acting as a numerical analogy of descriptors such as "very", "quite" or "slightly" (Ragin, 2008, p. 74; Schneider and Wagemann, 2012, p. 33). I found, by experiment, that using fuzzy calibration did not lead to more insightful analysis of my case data. This was for four reasons. Much of the significant variation in conditions (for example, the country in power before independence) was qualitative, not quantitative, so would not be revealed with fuzzy-set coding. The reliability of the historical quantitative data which I draw on (such as literacy rates), is not always strong (OECD, 2014). Applying a fuzzy-calibration to this data had the potential hide this issue, leading to findings which could not be supported by the empirical data. Exploratory investigations of correlations between individual quantitative case conditions (such as per capita GDP or literacy rates) and the degree of choice offered by MOI policies did not reveal relationships which could be translated to fuzzy calibrations. Finally, the fuzzy-set coding made it harder to track and interpret the MOI policy choices of individual states across the longitudinal waves of analysis of this study.

The analysis which I present in this document uses truth-tables that are relatively large – being constructed from five or six crisp-set conditions. These conditions represented the concepts which provided the most theoretically meaningful separation between positive and negative cases for each of the MOI policy outcome types. The addition of characteristics to a QCA truth-table serves a different purpose to the addition of control variables to a regression analysis (where they are used to isolate the relationship between one or two key variables and the outcome of interest). Case characteristics are included in a truth-table in

order to reveal the overall effect of the interaction of different combinations of conditions (Ragin, 2014, pp. 93–95).

As the truth-tables were large, they had a large number of arithmetical remainders (more rows than cases) and produced Boolean solutions with complex terms. In themselves, large truth-tables do not preclude the development of insightful Boolean solutions if they are well constructed using characteristics that are relevant to the outcome of interest and Boolean minimisation strategies are selected that respect the logical demands of the analysis. For the longitudinal analysis of Purist and Pragmatic policy types (see chapter 6), I identified no non-trivial necessary conditions, and the case characteristics did not create impossible remainders, so I could generate parsimonious solutions. However, I used conservative solutions for the Pragmatic policy type as they improved the interpretation of my data. For the analysis of Accommodating policy types, the case characteristics did create impossible remainders, so I generated conservative solutions.

3.7 Case selection strategy

All empirical studies in the social sciences, both qualitative and quantitative, use data from cases that are taken from a population of interest. The validity and generalizability of conclusions drawn through any method of analysis is dependent, in part, upon the initial selection of cases to be analysed. Within the tradition of probabilistic statistical analysis randomised case selection is used to choose a representative sample of cases from the population of interest. This gives the potential for findings to be generalized to the wider population (Lucas, 2003, p. 37). Randomised samples are less common in comparative macro-causal studies. Whilst it is possible to carry out a comparative study of education policies by selecting cases at random from the population of countries of the world, it does not automatically follow that the cases selected in that manner will be comparable. In consequence, the selection of appropriate cases for comparison is generally purposeful, rather than random. This researcher driven selection of cases has been criticised by some methodologists for potentially introducing bias into comparative studies which can lead to spurious results being generated, thus making them inferior to studies that use randomised samples

and generate probabilistic findings (G. King et al., 1994, p. 128; Landman, 2008, pp. 36–37).

However, Ragin holds that the set-theoretic logic which drives QCA analysis and other comparative methods is inherently different to the probabilistic logic of statistical analysis, so one cannot be held to be superior to the other. This view is championed by Goertz and Mahoney (Ragin, 2008; Goertz and Mahoney, 2012). Rather than using a sample to make inferences about the characteristics of a wider population, the aim of a QCA analysis is to fully understand *"all relevant instances of the phenomenon of interest"* (Ragin, 2014, pp. 15–16). With QCA methodology the definition of the population of interest and the selection of a sample for analysis are one and the same thing. Ragin highlighted that case selection can have a significant influence on research findings and should not be an automated process. All decisions made during the analytical process, including case selection, should be theory-led, and consciously taken by the researcher (Ragin, 2000, Chapter 2; Rihoux, 2013). It would be wrong to say that findings from a comparative analysis such as QCA lack all external validity and cannot be used to make inferences about cases not included in the analysis. Rather, it should be borne in mind that any attempts at generalization will involve considering whether findings hold for cases which are of a qualitatively different type to those studied. Such a process of generalization *"across populations"* (Lucas, 2003, pp. 237–8) is a theoretical, rather than a statistical, exercise; so it should be carried out cautiously and with reference to suitable case data (Landman, 2008, p. 298; Schneider and Wagemann, 2010, p. 401; Ragin, 2014).

In common with other qualitative approaches to research, QCA is a cyclical process, with each step within the analytical process being guided by case knowledge and theoretical considerations. Re-formulating research questions, re-defining case selection criteria, and re-examining and re-interpreting case data is part of the process of using QCA. The back-and-forth conversations between theory refinement and increasing case-knowledge can lead to the QCA data set being adapted and refined. Such changes to the population of cases being analysed must have a firm theoretical justification as to why particular cases should, or should not, be included within the scope of the analysis. Cases should

not be excluded merely to improve the consistency of a solution term (Rihoux & Lobe, 2009, pp. 13–14; Schneider & Wagemann, 2010, p. 281,403, 2012, p. 121).

3.8 Purposeful case selection strategies

The QCA approach to exploring the social world is rooted in the belief that the context in which causal factors operates can affect their function. This understanding of the importance of assessing the effect of combinations of causal factors, rather than the net effect of any one specific variable begins, not with the construction of a truth-table, but with description of the context with which the outcome of interest is associated (Ragin, 2000, chap. 2). Any relationship claims made as the result of a qualitative comparative analysis will be conditional upon the context of the cases analysed. Since there are few, if any, sociological theories which are universally true, the advantage of this conditional approach to theory-building is that it creates generalised, and falsifiable, empirical statements about the social world. A conditional theory, bounded by a well-defined context, can be falsified by negative cases which are included within the scope conditions. However, cases, which fall outside of the scope conditions cannot be used to challenge it (Foschi, 1997; Rohlfing, 2019; Walker & Cohen, 1985, pp. 289–300).

The case-selection for this study uses scope conditions to execute a *Most Similar System Design* (MSSD), also called *"the comparable cases strategy"* (Lijphart, 1975, p. 163) where a purposeful selection strategy is used to identify a population of cases which, with regard to certain key variables, is as homogeneous as possible (Przeworski & Teune, 1970, p. 32). MSSD and its logical counterpart *Most Different System Design* (MDSD – in which as diverse range as possible of positive cases is chosen for analysis) are two possible strategies for managing the very large number of variables which may need to be considered by a researcher carrying out a comparative analysis of naturally occurring social systems. The MDSD case selection approach was inappropriate for this study as the outcome types were not pre-defined, rather they emerged from the data (see Chapter 5).

The analytical logics of both MSSD and MDSD have been used by anthropologists since the 1930s to select cases for inclusion in *"concomitant variation studies"* (which included regional studies as a specific type of MSSD)

that were carried out to develop or test for the existence of generalizable laws governing societies or cultures. The techniques of MSSD and MDSD facilitated this aim by allowing researchers to control or manipulate some variables (Naroll, 1971, pp. 236–237, 240–242). The comparative logic of case selection using MSSD is based on the logic of Mill's *Method of Difference* (Faure, 1994, p. 310; Landman, 2008, p. 70), which emulates the inductive logic of an experiment carried out under controlled conditions in the natural sciences. Cases are selected to show maximum variation on the outcome of interest, whilst resembling one-another in as many other respects as possible. Thus facilitating the search for meaningful differences between positive and negative cases and the identification of potential causal mechanisms.

By using pre-existing cases, selected to reduce variation between cases, the *Most Similar System Design* of case selection inherits both the advantages and the limitations of the *Method of Difference*, which were acknowledged by Mill (Mill, 1843, pp. 215–217). One of the chief criticisms of the MSSD strategy is that of *"over-determination".* Even if the cases are selected to be as similar as possible, there will still be many more variables than there are cases, so theoretical judgement is needed to determine what variation is meaningful, and what is not (Przeworski and Teune, 1970, p. 34; Lijphart, 1975, p. 172; Faure, 1994, pp. 313–4). This being said, MSSD is generally acknowledged as a useful tool for structuring cross-national investigations where experimentation or randomised sampling would be practically or ethically unfeasible (Przeworski and Teune, 1970, p. 32; Landman, 2008, p. 71).

The MSSD strategy for case selection is compatible with QCA because it generates a sample of theoretically relevant, purposively selected, positive and negative cases which reduces the number of variables which need to be taken into account during the truth-table phase of the QCA analysis. When this strategy is combined with using in-depth case knowledge to identify and define the case characteristics used to construct truth-tables, it more likely that the analysis will produce a meaningful solution equation (Thomann and Maggetti, 2020). It should be remembered that any factors which the MSSD-selected cases hold in common must be considered as necessary conditions for any causal explanations resulting from the analysis – they describe the environment within which causal

factors included in the QCA analysis interact (Falleti and Lynch, 2009). MSSD case selection is most effective when it is used by a researcher who is familiar with the potential cases and is guided by a clear theoretical framework (Rihoux and Lobe, 2009, pp. 13–14).

3.9 Scope conditions

One of the most commonly used case selection and context-setting strategies within comparative research is the area study. These are a form of MSSD, restricting an investigation to an empirically defined population of countries which is considered to share a particular set of regional characteristics that have a specific influence upon the outcome of interest. (Ragin, 2008, p. 73; Goertz and Mahoney, 2012, pp. 210–211). I initially designed this study as a multiple-area study – comparing countries from Southeast Asia, East Africa, and Eastern Europe. Using three geographical areas to define the countries to be included had the advantage of restricting the number of countries to a manageable level, whilst ensuring that the countries in the study represented a variety of different historical influences and educational traditions and also had a wide spread of dates of independence. However, the rationale for the choice of these three specific geographical areas was weak, with no direct link to the theories of language policy and state building which are driving this research, and this led me to reconsider my approach to case selection. I chose, instead, to implement an MSSD case selection strategy using scope conditions to define explicitly the population of cases whose MOI policy choices I wished to explore, whilst maintaining the globally comparative nature of the study.

Scope conditions are routinely used in theory-guided research to define the context of an investigation. They are a series of statements which describe the characteristics of the cases which are relevant to the argument being made or tested (Falleti and Lynch, 2009). Scope conditions are chosen so that they define a population in which every case (whether positive or negative) is relevant to the theoretical question being explored by the researcher and their choice should be theoretically justifiable (Ragin & Schneider, 2012, pp. 85,88-9; Walker & Cohen, 1985, p. 300). Scope conditions also define the extent of any theoretical claims made by a study, as they: *"enable a researcher to treat a value or a set of values of a given variable as a constant and to leave the study of the possible separate*

effects of those values to future work. In other words, scope conditions serve to incorporate variables into a hypothesis that a researcher wishes to acknowledge as relevant but does not want to investigate further." (Foschi, 1997)

Using scope conditions to select cases for this study enabled me to set aside the consideration of some theoretically potentially relevant drivers of MOI policy, such as state religions. This allowed me to concentrate on exploring the utility of using the concept of linguistic state-building to understand MOI policy choice and change, whilst still maintaining the global nature of the study.

Using scope conditions is more elegant, and more theoretically sound, than using multiple control variables within an analysis (whether qualitative or quantitative) to make a theoretical concept fit across a population of cases (Foschi, 1997; Rohlfing, 2019). By restricting the conceptual scope of a study, its conceptual homogeneity is increased. Scope conditions ensure that qualitatively similar cases and concepts are compared together and, as concepts do not have to travel as far, they can be more precisely and consistently defined (Goertz & Mahoney, 2009, p. 308, 2012, pp. 215–216). This makes it more likely that any causal relationship discovered by a researcher will be true for all of the cases eligible for inclusion within the analysis. The success of methods such as QCA, which have the aim of uncovering a set-theoretic relationship that accounts for all cases examined, can be measured in terms of their causal homogeneity. A theoretically sound QCA analysis will result in a truth-table with few contradictory rows, which will then produce a Boolean solution with a high level of consistency (Goertz and Mahoney, 2009, pp. 313–4, 2012, pp. 209, 211, 214). Equifinality, the presence of more than one combination of causal characteristics being associated with the outcome of interest, is not incompatible with producing an analysis with high causal homogeneity. If each separate combination of causal factors which forms part of the overall solution equation is consistently associated with the outcome of interest, then the solution can be considered to display good causal homogeneity (Goertz and Mahoney, 2009, pp. 308, 314–5).

A QCA truth-table can be used not only to investigate patterns of causation, but also to sort cases and to create a typology (Dumas et al., 2013, p. 57). The process of using scope conditions to define a population of interest is analogous

to using a truth-table to sort cases – the population of interest will be the cases which occupy just one row of the "case-selection truth-table". Considered in this way, scope conditions become necessary conditions which must be considered as an essential part of any causal mechanism identified as holding for the population of interest (Falleti and Lynch, 2009).

Scope conditions not only set limits on any claims that can be made using the research output, they also restrict the types of evidence which can be used to refute claims made by the study. Only data from cases which fall within the scope conditions of a study can be used to challenge any claims made by that particular study (Foschi, 1997; Ragin, 2000, pp. 61–62). It is possible to test whether findings from an initial study can be extended by relaxing the scope conditions and seeing whether the findings still hold for a more loosely defined population (Foschi, 1997). This process can be thought of as extending the population of interest to include cases from additional rows in the "case-selection truth-table". One potential outcome of relaxing a scope condition would be to find that a condition which was speculated to have an impact on the outcome (and was thus used to restrict case selection), such as the presence of a state religion, actually does not. Such a finding would widen the generalizability of the original findings. If, on the other hand, the original findings do not hold within the broader population, then the findings for the original population still hold but further work will have to be done to understand the properties of the wider population of cases.

3.10 Conclusion

In this chapter I introduced the set-theoretic methodology of Ragin's qualitative comparative analysis (QCA) by giving a worked example of the processes involved in it. I highlighted how QCA's flexible, case-based nature is suitable for the analysis of MOI policy choice and I described how I selected and modified available QCA procedures to suit the analytical requirements of this study. Finally, I discussed the importance of case selection to the QCA process. In the next chapter, I describe the scope conditions which I used to select cases for this study and introduce the cases.

4 Case selection and pre-independence MOI policies

In this chapter I describe the first parts of the QCA process – selecting cases and collecting data on them. I justify my choice of scope conditions used to purposefully select cases, and discuss my data collection strategy. I then give an overview of the school systems that were already established in each country before independence, presenting the cases in order of date of independence, to facilitate the identification of commonalities in MOI policies across different regions and colonial powers. Through doing this, I identified five distinct types of pre-independence MOI policy strategy and these inform my subsequent analysis of post-independence MOI policy choices.

4.1 Selecting cases for this study

This study explores at a global level, whether the MOI policy choices of new states can be explained in terms of the interaction of a linguistic state-building ideology with forces from the wider international linguistic market. I used scope conditions, described below, to make my analysis more manageable by increasing case homogeneity (Ragin, 2014, p. 15).

4.1.1 Time period of interest

I restricted my investigation to policy changes which occurred after WW2 as I am interested in the MOI policy choices made for state systems of mass-education. At the end of WW2, there was a global commitment, through the United Nations, to the aspirational ideal of universal basic education all (UN General Assembly, 1948). So I assumed that it would be possible to make meaningful global comparisons of MOI policies from this point onwards as I would be comparing education systems which have been established with the purpose of educating all children within a country, even if this ambition is not achieved in practice.

Prior to this period, some countries did have long established traditions of mass-education and of using language-in-education policy as a deliberate state-building strategy. However, in large parts of the world state-education systems focused on the education of the children of the élite and had marginal coverage beyond major urban areas. For example, Kenya, in 1948 had a racially segregated school system with separate streams for European, Asian and

African children. Within this system, just over a quarter of a million African children (out of a total population of over five million) were recorded as being enrolled in school, of which just over five thousand were in secondary school – and only 39 of those in the final year of secondary education (Beecher et al., 1949, p. 14; The United Nations, 1950).

Adult literacy and illiteracy rates are commonly used as indicators of past levels of participation in education (OECD, 2014, Chapter 5). In 1950 UNESCO estimated that 43-45% of the world's population was illiterate, with this proportion varying greatly between regions: from 7-9% in Europe to 80-85% in Africa (UNESCO, 1957, p. 15). This wide range in the distribution of illiteracy rates gives added support to my assumption that prior to the end of WW2 (which is when these adults would have been of school-age) levels of education provision were too diverse for a meaningful global comparison of MOI policies to be made.

Since my information on MOI policy changes comes from a mixture of primary and secondary documentation, I also imposed an upper time limit on my comparison of MOI policies. I excluded MOI policy changes which occurred after 2015 from my analysis and this upper-limit allows for a lag between changes occurring and the publication of accessible information on them. This upper limit increased the likelihood that I would have access to good quality data on all the MOI policy changes in my analysis, and reduced the chance of my omitting a policy change because I have not found any evidence of it amongst my sources.

4.1.2   Date of independence

Using membership to the United Nations as a criterion for being considered independent, I restricted my case selection to countries formed after the end of WW2 (United Nations, 2017). I included countries which had been independent states prior to being colonised (e.g., Estonia), and also those which have been formed by seceding from a larger state (e.g., Slovakia), but excluded states which were only occupied during or just after WW2 (e.g., France, Japan). I also excluded states, such as South Africa, which have had a radical change of constitution and administration but have not been recognised by the United Nations as a new state (N. Alexander, 2004). For countries where the transition to independence involved a period of self-government (France's African

territories and New Zealand) or federation with another state, (Senegal and Singapore), I have used the point when the country became fully politically independent as the date of independence (Dudley, 1984, pp. 57–58; Federal Research Division: Library of Congress, 1991, pp. 51–57). These steps ensured that all cases were previously part of a larger political entity (be it an empire, a larger state, or a federation). They also ensured that all of the countries in my sample began the development of their formally independent education systems after WW2, which is the era in which I am interested. However, as my analysis reveals, formal independence does not by any means imply that the new state's education system is no longer influenced by the interests of the ex-colonial power.

4.1.3 State and religion

There can be a strong link between the activities of religious institutions and the development of literacy within states (Spolsky, 2004, p. 52). Eritrea, Georgia, and Armenia all developed unique literary languages with their roots in church liturgy very early on in their histories (Bereketeab, 2010; Federal Research Division, 1995) and the orthography of the Malay language and its variants has changed in response to successive waves of Hindu, Muslim and Christian religious influence carried by both traders and missionaries (S. Ager, 2021). The colonial-era administrations of many states depended upon missionaries and religious foundations to provide basic education to the population and this led to the uncoordinated development of literary standards for community languages (Rassool, 2007, p. 246). In addition, some languages have a strong association with particular religions, and this can influence language planning activities aimed at state-building. A strong example of this is the deliberate use of Ausbau strategies by Hindu and Muslim leaders in pre-partition Northern India to increase the differences between Hindi and Urdu in an effort to create distinct religio-linguistic identities for each group (das Gupta, 1971).

Whilst these potential interactions between state religion and school language policy would be interesting to investigate, the focus of this study is the interaction between linguistic state-building strategies and the wider international linguistic market. For this reason, I have excluded countries which recognise, and give preferential status to, a specific state religion in their constitution (International IDEA & Interpeace, 2017; The Comparative Constitutions Project (CCP), 2017).

Making this decision to exclude countries with explicitly religious constitutions in no way implies that I am ignoring, or attempting to trivialise, the impact that state religions can have on language policies. Rather, I am using this scope condition, as Foschi (1997) suggests, to acknowledge that state religion is a relevant variable to consider when seeking to understand MOI policy choice but to make clear that I will not be directly addressing its impact in this piece of work.

4.1.4 System of governance

To further increase case homogeneity I restricted the number of types of government systems which I would be making comparisons between. For all of the issues described in this section, I made my decision to include or exclude cases based on current situations, as described in the 2017 edition of the World Factbook (Central Intelligence Agency (CIA), 2017). My initial reason for using these restrictions was to exclude federal systems, such as India and the USA, from my analysis as different states within a federation may have the power to implement their own language-in-education policy. This would mean that investigating the MOI policies of any one federal state would be a comparative study in its own right as each component state would be likely to implement its own interpretation of any overarching federal language policy. For similar reasons I also chose to exclude states with autonomous regions, whether de jure or de facto, that have very different language-in-education policies to that of the main part of the state. I had to use wider case knowledge to make judgements on whether or not an autonomous region had a very different language policy to the main part of the country. States I excluded included Moldova (with its Trans-Dniester region) and Cyprus (divided into Greek and Turkish regions) (Ciscel, 2008; Hadjioannou et al., 2011). However, I made the decision to include Indonesia (with its special autonomous regions of Aceh and Papua) and Tanzania (with its semi-autonomous region of Zanzibar) (Babaci-Wilhite, 2015) as their MOI policies are similar to those in the rest of the country.

After this, the group of unitary states which remained as potential cases for inclusion in my study was still very diverse in terms of their systems of governance. So, working on the assumption that non-democratic states may implement state-building language in education policies in a different way to democratic states, I chose to restrict my investigation to democracies - removing

states which the World Factbook listed as being constitutionally communist states, one party states, or absolute monarchies. Doing this left me with a population of countries which all have provision for the democratic election of politicians within their constitutions. However, not all of these are functioning democracies: Belarus, for example is described by the World Factbook as a *"presidential republic in name, although in fact a dictatorship"* (Central Intelligence Agency (CIA), 2017). Other states, such as Kenya, were governed as one-party states for long periods of their independent histories (BBC, 2020a). I took these differences into account in my analysis.

4.1.5 Population size

I excluded countries which, in 2016, had a population of less than one million (World Bank, 2018b) as the World Bank considers that small states have *"unique developmental challenges"* so it may be that the MOI policy choices of very small states may be different to those of larger states (World Bank, 2020b). In addition, I was concerned that the education systems of very small states may be under-researched, so it would be difficult to collect sufficient information on their MOI policy histories. Even with this restriction, the populations of the states included cover a very wide range, however I found little direct relationship between population size and MOI policy type.

4.1.6 State stability

A state-education system is a public service provided by a government to the citizens of its country. It's nature and quality is likely to be affected by adverse conditions within the state, so I wanted to exclude the influences of the extremes of violence, civil unrest, and poor governance from my analysis (UNESCO, 2011b). I was also concerned that I would not be able to collect sufficient high-quality data on the MOI policies of very unstable states. This scope condition was difficult to operationalise in a manner that was both meaningful and not overly time-consuming. My solution was to rely on the Fund for Peace's *Fragile States Index* (FSI), which provides an overview of factors which could put a state at risk of collapse. The Public Services (P2) component of the FSI provides a measure of the effective provision of essential services, including education, with higher index values indicating lower levels of provision (The Fund for Peace, 2017). I excluded any country which had a P2 value of 9 or higher for three or more years

in the period 2006-2020 (the period of time covered by the FSI). This condition excludes countries which currently have very weak infrastructures but many of the cases included within the analysis have experienced periods when their education systems have been adversely affected by violence or poor governance. I took this into account which I carried out my final analysis.

4.2 States included in this study

Applying the scope conditions outlined above left me with a population of 42 states, listed in Table 4-1 below.

country	independence date	code	country	independence date	code
Belarus	1991	BLR	Lithuania	1991	LTU
Benin	1960	BEN	Mauritius	1968	MUS
Botswana	1966	BWA	Namibia	1990	NAM
Burkina Faso	1960	BFA	New Zealand	1947	NZL
Cameroon	1961	CMR	North Macedonia	1991	MKD
Côte D'Ivoire	1960	CIV	Philippines	1946	PHL
Croatia	1990	HRV	Rwanda	1961	RWA
Czech Republic	1993	CZE	Senegal	1960	SEN
Equatorial Guinea	1968	GNQ	Singapore	1965	SGP
Eritrea	1993	ERI	Slovakia	1993	SVK
Estonia	1991	EST	Slovenia	1991	SVN
Gabon	1960	GAB	South Korea	1950	KOR
Gambia	1965	GMB	Tajikistan	1991	TJK
Ghana	1957	GHA	Tanzania	1961	TZA
Indonesia	1945	IDN	Timor Leste	2002	TLS
Jamaica	1962	JAM	Togo	1960	TGO
Kazakhstan	1991	KAZ	Trinidad and Tobago	1962	TTO
Kenya	1963	KEN	Turkmenistan	1991	TKM
Kyrgyzstan	1991	KGZ	Uganda	1962	UGA
Latvia	1991	LVA	Ukraine	1991	UKR
Lesotho	1966	LSO	Zambia	1964	ZMB

Table 4-1Countries captured by the scope conditions for this study with their dates of independence and ISO codes.

4.3 Collecting case data

To operationalise this study I gathered information from a diverse range of written sources, including, but not limited to, policy documents and other government publications, reviews on education policy produced by international bodies such as UNESCO and the World Bank, and academic publications which analyse the language policy decisions made by specific countries. I provide a country-by-

country bibliography of the case data sources which I drew on for this study in section 11.

This approach enabled me to gather information on the changing MOI policies of the countries included in this study and also to build up a picture of the socio-linguistic background against which those MOI policies were made. There is a well-established precedent for using academic and grey literature as the principal data sources for making comparisons between the language policies of many states. Examples of such studies include Kirkpatrick and Liddicoat (2017) on Southeast Asia, Trudell (2016) on Eastern and Southern Africa, and Pavlenko (2008a) on post-Soviet states. The amount and quality of data which I have been able to access on some states has been limited where states have not been widely researched, or have not been partners in recent international or bilateral educational initiatives. This issue of a lack of availability of detailed data has not prevented the inclusion of sections on countries such as Equatorial Guinea within reputable compilations of education policy (Njiale, 2014). In my analysis I have used the cases about which I have the most detailed and reliable information to guide my decision making processes and then have tested to see how other, less well described, cases fit within the framework which I developed.

My use of desk-based documentary research is not just a pragmatic solution to gathering facts about the education systems of a large number of countries. As part of his argument for the need to create a new comparative methodology, Ragin describes case-based research as *"very private products"* and pointed to the advantages of being able to synthesise the findings from such studies rather than considering them in isolation (Ragin, 2014, p. 84). The QCA research approach enabled me to take advantage of the detailed case knowledge of many different country specialists, combining it in a transparent manner, in order to make meaningful comparisons between cases and thus, potentially, reveal patterns or trends which are not evident when the country cases are studied in isolation from one another.

My starting point for gathering data on each state was to search of the academic literature. As Spolsky observed, language policies are not always formally codified so*, "the chore of deciding whether a country has a policy and what that*

policy is, is often first tackled by a sociolinguist and published in an academic journal." (Spolsky, 2004, p. 14). This formally published literature then signposted me towards other sources, including official government documents and publications from NGOs and supranational institutions. I made my approach to data-gathering as reliable as possible by cross-checking case information using multiple reputable sources. When reading documents, I took into account the position of the writer and the nature of the audience for which they were writing in order to reach a balanced understanding of the MOI policies which they describe (McCulloch, 2012, pp. 212–213). As well as providing information on the nature, and implementation, of MOI policies for the education systems of particular countries, the academic, official and professional literature also provides evidence (both direct and indirect) of attitudes towards language-in-education policy current at the time that articles were written (McCulloch, 2004, p. 28). My exposure to these different perspectives within the case data enriched my perception of how time influences MOI policy choice.

An unavoidable limit to the effectiveness of my data collection process has been my own language skills. Whilst I have been able to access some sources published in French and bahasa Indonesia, the bulk of my information on cases comes from the English-language press. This potential source of bias has increased my awareness of the disproportionately strong influence that those who publish in languages which have a high status within the global linguistic market have on ideas promoted as best-practice for language-in-education policy. This awareness is also reflected in my handling of the concept of "language status" within the linguistic market model which I use to structure this research.

4.4 Focus on primary & secondary school MOI policy

Primary and secondary school MOI policies are viewed as powerful tools for linguistic state-building because most school systems are designed (on paper, at least) to be accessed by the majority of children, whilst higher education is more selective. Access to, and participation in higher education varies greatly. In wealthier countries such as New Zealand (52%) and Estonia (46%) about half the population graduates from university (2013, gross graduation ratio from first degree programmes, (UNESCO Institute for Statistics (UIS), 2021). However in

less wealthy countries this proportion is much lower. In 2010, 6.6% of Indonesia's 25-29 year-olds had achieved the equivalent of a first degree qualification (Badan Pusat Statistik, 2010). In the lowest income countries, this proportion is even lower. In 2009, just 3.1% of over twenty-fives in Ghana and 2.2% of Kenyans had completed any form of tertiary education (World Bank, 2020a). Although participation rates in primary and secondary education vary greatly between different countries and across the period over which I am comparing MOI policies, they are consistently higher than participation rates for tertiary education. For this reason, whilst acknowledging the linkages between higher education and school MOI policies, I focus on the role of primary and secondary schooling MOI policies as drivers of linguistic state building.

4.5 The role of pre-independence education systems in establishing national linguistic markets

Prior to independence, all of the states in this study had some form of centrally-regulated education provision. The character, quality, and extent of this pre-independence formal education provision varied greatly and depended, in part, upon traditions of literacy already present within the country, but mostly upon the educational goals of the ruling power (Zymek & Zymek, 2004). These language-in-education policies both enabled and restricted access to the language of high-level administration. Many writers have described how colonial powers used language-in-education policy, either directly or indirectly, to further their political and economic ambitions and, in consequence, altered the linguistic markets of the countries which they once ruled (Anderson, 1991; Brosnahan, 1963; R. L. Cooper, 1989; Phillipson, 1992). The languages privileged for use within pre-independence education systems set a precedent for the MOI policies of post-independence educational institutions and created an association between the use of particular languages and potential pathways to future success in state controlled domains (A. M. Mazrui & Mazrui, 1996, p. 273). I seek to understand why the policy makers of some new states have sought to reproduce these inherited patterns of language status within their national linguistic markets, whilst others have sought to change them.

In this section I present and compare pre-independence MOI policies which were used after WW2, when the provision of mass schooling became a global concern. I gathered relevant information on the origins of formal education provision for each country, regardless of when it occurred, and used this additional information to improve my data analysis and my interpretation of results. This was particularly useful when dealing with the new Eurasian states as many of their MOI policies are still accommodating, or reacting against, patterns of language use in formal domains which were set up in the Nineteenth Century, or before, under one or another of the old European powers, which include the Tsarist, Austro-Hungarian, and Ottoman Empires (T. Bulajeva & Hogan-Brun, 2008; Gawdiak, 1989; Oschlies & Hörner, 2015).

I present the cases chronologically, grouping cases with similar dates of independence together. Because, for the most part, countries which were colonised by the same power gained independence at the same time, this strategy allowed me to summarise the characteristics of the general MOI strategy of each colonial power and to note variations within it. The advantage to me of avoiding grouping the cases by colonial power was that it made me more open to seeing similarities in pre-independence MOI policies between cases with different colonial histories. I identified five distinct MOI policy strategies being used across all of the cases, which I describe at the end of this chapter.

4.5.1 The earliest cases: Indonesia, the Philippines, New Zealand and the Republic of Korea

The four cases with the earliest dates of independence – Indonesia, the Philippines, New Zealand and the Republic of Korea (South Korea) illustrate the wide range of language-in-education policies inherited by the countries in this study. This difference is qualitative – with different languages, or combinations of languages being used as MOI, and also quantitative – with different proportions of the population having access to formal education.

Before independence, **Indonesia** had several well-established élite literary and education traditions, which reflected the diversity of cultural and religious influences that travelled, along with trade, on the spice routes. However it was not one of these high status languages, such as Javanese, or even the language

of the colonial power, Dutch, which was chosen as the language of the Indonesian independence movement, rather it was bahasa Indonesia, a form of Malay. Malay variants were used as trade languages throughout Southeast Asia and Malay was also used as a language of administration by the Dutch colonial power. In 1928 bahasa Indonesia was chosen by the Indonesian independence movement to be the national language. The Youth Pledge (Sumpah Pemuda) of *"one country, one people, one language"* adopted at this time shows that the power of the linguistic state-building meme was not confined to Europe (Watson, 1980).

Although access to formal, western-style education increased in Indonesia during the inter-war period, it was still highly restricted. In 1940, out of a population of more than 70 million, just over two million children were in elementary school. This total included Dutch children and the Indonesian élite who had access to full Dutch-medium primary school – completion of which was necessary for employment within the civil service, or progression to secondary school. However, the majority of school children attended poorly-resourced 3-grade village primary schools which used local languages as their MOI (Thomas & Surachmad, 1962). This situation of limited and unequal access to education is reflected in Indonesia's literacy rate at independence, which was estimated to be considerably less than 10%.

After being occupied in WW2 as part of Japan's Co-Prosperity Sphere (Grajdanzev, 1943), Indonesia had a violent transition to independence. These factors are routinely cited in the literature as contributing to why, the "new" language, bahasa Indonesia, was successfully established as the national language of independent Indonesia and the dominant MOI of its education system (Alisjahbana, 1976, Chapter 2; Hoy-Kee, 1971; Watson, 1980). During WW2, the Japanese occupying forces prohibited the use of Dutch in schools and actively promoted the development and use of bahasa Indonesia as an MOI, as well as the teaching of Japanese as a subject – which further restricted levels of Dutch literacy within the general population (Alisjahbana, 1976, chap. 2). In chapter 8 I discuss how independent Indonesia's MOI policy has evolved from initially having a near-exclusive focus on linguistic state-building to embracing the use of languages with high status within the international linguistic market.

At independence the **Philippines** resembled Indonesia in several respects. It had a large, linguistically diverse population, spread out across an archipelago, and had also been occupied by the Japanese during WW2. However, the linguistic market formed by its pre-independence education system was markedly different. After a long period of rule by the Spanish, the Philippines became a colony of the USA in 1898. Under Spanish rule, from 1863 primary education was made compulsory and was used to spread the Catholic faith and popularise the use of Spanish, which was the only permitted MOI – though, in practice, local languages were often used for teaching and learning, and attendance was far from universal. One of the chief aims of the education policies of the new American administration was to replace Spanish with English as the dominant MOI and language of administration. This was evident in the 1900 report of the Schurman Commission which was appointed to make recommendations for the improvement of education in the Philippines, and recommended introducing English as the MOI for primary schools as soon as was possible. A 1927 Bureau of Education service manual echoed this recommendation, presenting the linguistic diversity of the Philippines as a barrier to prosperity . A non-educational factor which facilitated the imposition of English as the dominant MOI was the extension of the USA's Chinese Exclusion Law to the Philippines in 1902. This severely restricted the free movement of Chinese labour and, in consequence, curtailed the development of a tradition of Chinese-medium education in the Philippines. This created another difference between the Philippines and Indonesia, where Chinese-medium education provided an alternative linguistic route to accessing high-quality education (Cabotaje, 1962, pp. 57,72-78; Koh, 1965; Special to the New York Times, 1902).

The USA's approach to using MOI policy as a political tool was very different to that of the Dutch education system of pre-independence Indonesia, which restricted opportunities for acquisition of the high status language – Dutch. At independence, the Philippines had a literacy rate of nearly 60%, indicating that their pre-independence education system had a much wider reach than that of Indonesia's and suggesting that a much larger proportion of the population had a vested interest in retaining the use of the language of the colonial power as an official language after independence.

Western-style education and literacy was brought to **New Zealand** by Christian missionaries from 1815, before the formal establishment of British rule in 1840. These early educators were also the first language planners – developing orthographies for what had been, until then, an oral language tradition; and literacy in Māori spread rapidly (Barrington & Beaglehole, 1990). Unlike Indonesia and the Philippines, which have high levels of linguistic diversity, the indigenous people of New Zealand used mutually intelligible versions of a common language - Te Reo Māori (Keegan, 2017; Māori Language Commission, 2012).

New Zealand was seen by the British government as a settler state – with British nationals encouraged to emigrate there. However, the legal basis for its establishment as a British colony was different to the "terra nullis" legitimation of the colonization of Australia (Australian Museum, 2021). New Zealand officially became a British colony with the signing of the *Treaty of Waitangi* by representatives of the Crown and of the Māori tribes, which ceded governance of New Zealand to the Crown, whilst protecting the rights of the Māori to manage their own affairs. Since its signing, the wording and meaning of the Waitangi Treaty has been subject to debate, and in 1975 the Waitangi Tribunal was established to hear Māori claims regarding breaches of the treaty (New Zealand. Manatū Taonga Ministry for Culture and Heritage, n.d.).

Public funds were first made available to establish and support schools in 1847. One of the conditions of funding was that, *"instruction in the English language shall form a necessary part of the system to be pursued therein".* It was not until 1877 that school attendance was made compulsory for Europeans (but optional for Māori) (An Act to Make Further Provision for the Education of the People of New Zealand, 1877; An Ordinance for Promoting the Education of Youth in the Colony of New Zealand, 1847; Simon, 1992). The Native School Act of 1867, whilst not expressly forbidding the use of Māori as an MOI, made government funding for Māori schools conditional upon inspectors being satisfied that "instruction is carried on in the English language as far as practicable" (Native Schools Act, 1867). This linking of government funding for all levels of education (including lower primary) to the use of English as an MOI was done to integrate the Māori into English-speaking colonial society and avoid the further development of a distinct literary Māori identity, which could be seen as a

challenge to the dominance of British rule (Moon, 2019). Whilst New Zealand maintained separate Māori and European school systems until well after independence, it was always possible (but not always practicable) for Māori children to study in the better-resourced European schools. Whilst the use of Māori as an MOI was never formally banned in pre-independence New Zealand, the combination of legislation which promoted the use of English and the need for English language literacy in order to benefit from social and economic opportunities led to a dramatic decrease in the status of Māori, when compared to that of English, in formal domains (Barrington and Beaglehole, 1990).

Unlike Indonesia and the Philippines, New Zealand was not occupied by the Japanese during WW2 and its transition from self-governing British colony to fully independent state was a bureaucratic exercise. This process was completed in 1947, when New Zealand ratified the 1931 Statute of Westminster (Ministry for Culture and Heritage (NZ), 2022; UK Parliament, n.d.). This bureaucratic independence process, and official figures which claimed near universal literacy, disguised the tensions caused by the differences in relative status between the Māori and English languages and the social and economic inequalities associated with this. In chapter 7 I discuss how New Zealand's post-independence MOI policies have changed to mitigate this difference by supporting the increased use of the Māori language as an MOI.

The MOI policies which Japan implemented in **Korea** had similar aims to those used by the USSR in the Baltic states after WW2. They were designed to restructure the occupied state's linguistic market – replacing the pre-existing dominant language with that of the colonial power. Prior to being annexed by the Japanese in 1910, Korea already had a well-established literary and educational tradition, which had led to one common formal language identity being used across the whole country. The Japanese administration's perception of the well-established Korean language as a barrier to the acceptance of a Japanese identity by the Korean people was seen in its, increasingly restrictive, MOI policy strategy, which culminated in the Education Ordinance of 1938 which made Japanese the sole MOI. After the creation of the modern state of the Republic of Korea, a key characteristic of its post-independence MOI policy (encouraged by its transitional US administration) has been the promotion of the Korean

language, both as a symbol of national identity and as the sole MOI of its education system (Adams & Esther E, 1993, pp. 12–18).

4.5.2 Comparing MOI traditions in French and British colonies: Ghana, Benin, Burkina Faso, Côte D'Ivoire, Gabon, Senegal, Togo

France and Great Britain are often presented as having very different approaches to schooling in their colonies. The laissez-faire voluntarism of educational provision in British colonies is contrasted with the centrally-regulated nature of French colonial education and both are considered to mirror government attitudes towards mass education provision in Metropolitan France and Britain themselves (Clignet & Foster, 1964; Spolsky, 2004, pp. 46–47; White, 1996; Whitehead, 1981). Following the recommendations of the Phelps-Stokes Commissions, from 1925 onwards, with the publication of the Colonial Office's *Memorandum on Education Policy in British Tropical Africa,* the general MOI strategy in British administered African territories was for any government-assisted education to be carried out through community languages for the first few years of primary schooling and for only the more advanced classes to be taught through English (Berman, 1971; Chiu, 2010; White, 1996, p. 13). In contrast, the French policy, formalized at the 1944 Brazzaville Conference, was for French to be used as the language of instruction in all classes, with some accommodations being made for schools in Islamic regions (White, 1996, pp. 12–13). The Brazzaville conference coincided with the formation of the *Union Française* which made the colonies of French Africa an integral part of the new French Republic. In consequence, the education systems of French Africa were expected to deliver the same curriculum as those in Metropolitan France and they received support from France to do so. This bilateral support in the form of staff, training and funds continued during the period of *coopération culturelle* which lasted until 1970, well after the states of French Africa had become fully independent, strengthening the undisputed position of French as the sole MOI and the dominant language of each country's national linguistic market. This means that, whilst differing in many ways, the six ex-French colonies (Benin, Burkina Faso, Côte D'Ivoire, Gabon, Senegal, and Togo) had near-identical identical MOI policies at independence (Walsh, 1999, pp. 32-4,72-5).

In contrast, the initial post-independence MOI policies of the British colonies were decided on a case-by-case basis and show much greater diversity. The individualistic nature of these decision-making processes is seen in **Ghana**, which was the first British African colony to gain independence. Modern Ghana was formed when British-administered Togoland (which was a German colony before WW1) was merged with the Gold Coast in 1956 (Commonwealth Secretariat, 2021a). Before independence a four-man committee was appointed to research the current conditions of education in the Gold Coast's schools and make recommendations for the MOI policy of its post-independence education system. The committee toured schools within the Gold Coast and also made comparative visits to schools within French-administered Togoland. Their report is remarkable as the committee failed to come to an agreement over whether they would recommend the use of "vernaculars" as transitional MOI in early primary schooling, or they would recommend the use of English as the sole MOI. In consequence, the report had two separate summary chapters – one by the three members in favour of using vernaculars, and one authored by the sole member, Yankah, who was opposed to this (Barnard et al., 1956). The Ghanaian government ended up following the recommendations of what came to be referred to as the "minority report" and independent Ghana's first MOI policy was for English to be used as the sole MOI in all levels of school (Agbedor, 1994, p. 153). Since then (see Chapter 6) Ghana's early primary school language policy has oscillated between allowing and rejecting the use of community languages as MOI as a stepping stone to the acquisition of the economically powerful official language, English. Many of these changes have coincided with changes of political regime (Bamgbose, 2000).

Whilst there are distinct differences between the MOI policies of the British and French colonial powers for early primary school, the overall goals of their colonial MOI policies were actually very similar. Both education systems were assimilationist, with the language and culture of the colonial power being disseminated at the highest levels of education and access to this high level education was restricted – places were limited, fees were high, and entrance requirements were often racist (Clignet and Foster, 1964; Whitehead, 1981; Bamgbose, 2000). Consequently, the colonial-era MOI policies of both France and Britain resulted in the language of the colonial administration becoming the

dominant language of the national linguistic market and community languages losing status, despite the fact that overall education and literacy rates were very low. This dismissive attitude towards the value of community languages without official status as tools for learning continues to be found within the school systems of many countries with French or English colonial histories to the present day (UNESCO Global Monitoring Report Team, 2010, p. 11).

4.5.3   Diversity in colonial-era African educational experiences: Cameroon, Rwanda, Tanzania, Uganda, Kenya, Zambia

Some of the states in this study can be considered as having experienced only one type of pre-independence formal educational tradition in the Twentieth Century. For example, at independence Kenya inherited a formal education structure which had been developed by the British administration alone. This is, of course, a simplification and ignores other, older, traditions of education-for-literacy such as those in the Swahili-Arab coastal regions (Mwiria, 1991). However, many countries have more complex colonial histories. Some, such as mainland Tanzania (Germany, then the UK), Timor Leste (Portugal, then Indonesia), and Eritrea (Italy, then the UK, then Ethiopia) experienced changes of colonial administration during the Twentieth Century (Rena, 2014; Rubagumya, 1986; Taylor-Leech, 2011). Others, such as Ghana and Cameroon were formed from regions which have different colonial histories to one another and, in consequence, have inherited mixed traditions of language-in-education policy (Constable, 1974).   Still others were a part of a larger colonial-era administrative region and split away as a separate state at independence. Examples of this include Zambia (which as Northern Rhodesia, was part of the British-administered Federation of Rhodesia and Nyasaland) and Rwanda, which was first part of German East Africa, and then Belgian-administered Rwanda-Urundi (BBC, 2018f; Leclerc, 2020b). Most of these changes in colonial administration occurred at the ends of the First and Second World Wars, which saw redistributions of the territories formerly controlled by the defeated powers. These processes were overseen first by the League of Nations and then by the United Nations (Holcombe, 1946; Potter, 1922).

The three neighbouring East African states, Kenya, Tanzania, and Uganda illustrate how different patterns of European colonial rule, combined with

differences in the social structures of each country, shaped the pre-independence MOI policies of each country. These countries gained independence from Britain at similar times and all inherited racially segregated education systems with restricted access to élite English-medium secondary education (Roy-Campbell, 1992, pp. 97-8,109; Whitehead, 1981; Woodhead & Harper, 1958). However, there were differences between the three countries as to how languages other than English were used in schools and these differences had a lasting impact on the post-independence MOI policies of these countries. This is particularly noticeable in the different roles given to the coastal lingua franca, Kiswahili. In 1930, the Inter-Territorial Language (Swahili) Committee was formed to create a standardised form of the Swahili language which could be used as a language for education and communication throughout the British East Africa region. This was done despite the fact that in some areas other MOI traditions were already established (Whiteley, 1956; Mtesigwa, 2001, p. 47).

The Westernised development of **Uganda** in the early Twentieth Century was uneven. The territory of British Uganda was divided into several traditional kingdoms and British colonial efforts initially centred around the kingdom of Buganda. The region increased in status through the growth of cash crops and investment in transport infrastructure. Buganda became a centre of Western-style education, provided by Christian-missions and funded by African money. This new education took the place of Buganda's traditional education system for chiefs and the graduates worked with the British as administrators. By 1912 Luganda had been established as an official language of Buganda to be used, alongside English, in both education and administration. Western-educated, Lugandan speaking administrators were sent to work in other parts of Uganda – a fact which was resented by non-Lugandans (Byrnes, 1992, p. xxii,5,13-5; Namyalo & Nakayiza, 2015). A proposal in 1927 by the then governor of Uganda to use Swahili as a language of administration and education across other areas of Uganda was met with strong resistance by the Bugandan administration as the development of Swahili might challenge the position and prestige of Luganda within Uganda's linguistic market. Due in part to this objection, whilst other regional languages were developed for use as MOI in basic education, Swahili was not introduced as a common MOI, although it was used as the language of the police force (Myers Scotton, 1981, pp. 15–16; Whiteley, 1956).

Like New Zealand, colonial-era **Kenya** was a "settler state", with a larger proportion of European residents than Tanganyika and Uganda. By the 1930s several community languages, included Swahili in coastal regions, had been developed, first by missionaries and later by the British administration, as MOI for basic education. However, no one of these languages was adopted as a working languages for colonial administration across the country. Swahili was commonly used as a low-status lingua franca by the many European settlers in Kenya that employed Africans. This meant that knowledge and use of Swahili spread across the country. However, there was resistance to the use of Swahili in formal domains by politically and economically powerful inland groups including the Kamba and Kikuyu (Whiteley, 1956). This negative attitude continued when Swahili was made the national language of Kenya in 1974, more than ten years after independence (Harries, 1976).

Before WW1 Tanganyika (which united with Portuguese controlled Zanzibar to form modern-day **Tanzania** in 1964) was part of German East Africa (Trudell, 2016, pp. 7–9). The German administration restricted access to the élite language, German (Roy-Campbell, 1992, pp. 91–92). Instead, they used variants of Swahili (which was the language commonly used in the region surrounding the coastal capital Dar es Salaam) as languages of administration throughout Tanganyika. Swahili variants, along with a number of other languages had been codified for use in education by missionaries by the end of the Nineteenth Century. In an effort to distance the Swahili language from being associated with the Islamic faith and Arab culture, a Latin orthography was developed for Swahili and (unsuccessful) efforts were made to develop alternatives for Arab-derived terminology (Mtesigwa, 2001, pp. 40–45).

Although in the early Twentieth Century access to formal education was limited, when the British administration took over Tanganyika after WW1 there was a well-established tradition of Swahili being used as an MOI, or being taught as a subject in non-Swahili speaking areas, as well as being used as the language of colonial administration. This pattern was retained by the British administration, with English replacing German as the language of secondary education (Roy-Campbell, 1992, pp. 92–94). In 1928 the African Education Act was passed, making Kiswahili the sole MOI of all government and mission-run African primary

schools from grades 1 to 6 (Mtesigwa, 2001, pp. 45–47; van der Ploeg, 1977). In 1945 there were only 18 secondary schools in Tanganyika, only one of which offered the full four-year secondary programme. In contrast, the separate education systems for Asians and Europeans were better resourced and offered a higher level of education as a matter of course. With the exception of early primary education in the Asian schools, these all used English as their MOI. In response to increased demands for access to better quality, English medium, education for Africans in Tanganyika, in 1946 the structure of the African education system was changed to one of four three-year cycles, with Kiswahili retained as the MOI for the first five years of education and a transition to using English from Standard 6. However, an integral part of these changes was a deliberate restriction of access the higher levels of education, with a target of universal attendance for the first four years of primary school, but only 20% for Standards 5 and 6, and even lower for the secondary school age groups (Roy-Campbell, 1992, pp. 97–98, 103–105).

These measures meant that in the years before independence Swahili spread beyond the coastal regions to become Tanganyika's standard language of primary education and formal administration and thus a language associated with social and economic opportunity. However, despite its widespread use and established position in formal domains, Swahili was not the dominant language of Tanganyika's linguistic market as English was the language of élite secondary schooling and high-level administration. There was also resistance to the use of Swahili in non-Swahili speaking inland regions which had not benefitted from any development associated with education. However, compared to Uganda and Kenya, the use of Swahili in formal domains, including education and politics, was strongly established in Tanganyika before independence (Whiteley, 1956). In chapter 6 I compare how these different pre-independence MOI traditions have interacted with post-independence political and economic factors to shape the MOI policies of independent Kenya, Uganda and Tanzania.

France and Britain were not the only colonial powers deciding the pre-independence MOI policies for the African cases. Just using the name of the colonial power, or the dominant language of the pre-independence administration, does not give clear insight into the type of MOI policy which they

imposed on their dependencies. The pre-independence MOI policy of the Belgian administration in Rwanda illustrates the importance of considering this issue. Whilst the official language of the Belgian administration was French, the patterns of MOI policy that they used had more in common with those of the British, Dutch or Germans, that they did with the very standardised French-language-only MOI policies that France used in its own colonies.

Like Tanganyika, **Rwanda** was once part of German East Africa. After WW1 it was governed as part of Rwanda-Urundi by Belgium. During the inter-war period Belgium did this indirectly (as had Germany) through Tutsi kings. Like the British, education provision in both German and Belgian colonies depended heavily upon the work of Christian missions. During the German-era, education provision in Rwanda was very limited. Access to literacy increased with the arrival of the Catholic, French-speaking, White Fathers mission in 1931. Rwanda is a small country and has an unusually high level of linguistic homogeneity when compared to other African countries. Unlike the situation in Uganda, where Luganda was the language of the Buganda people alone, the Rwandan language, Kinyarwanda, was spoken throughout the country by the vast majority of the population. Kinyarwanda was given a Latin orthography by the White Fathers and this was used to spread literacy in Kinyarwanda as part of their evangelical campaign. The French language was only used as an MOI in élite secondary education, which was only open to the sons of the ruling Tutsi families (Samuelson & Freedman, 2010).

Although the official language of the Belgian administration was French, unlike in French-administered colonies, not all of the Belgian missionaries and administrators were French speakers. Dutch was the first language of many lower-level Belgian administrators. Some Flemish missionaries even taught Dutch to the marginalised Hutu group, who were excluded from élite French-medium education. This mixed use of the local language, Kinyarwanda, and two European languages for education and administration was very different to the blanket use of French alone by the administrations of French colonies (BBC, 2018d; Leclerc, 2022).

Throughout the Belgian colonial era access to secondary education, even for the Tutsi, remained very low and was not developed substantially until 1959, just three years before Rwanda's independence in 1962. In 1967 (five years after independence), enrolment in the first year of primary school (as a proportion of the appropriate age group) was 65% of girls and 85% of boys (totalling over 120,000 children). However, out of a population of 3.3 million, there was a total of just 2693 girls and 5657 boys in all of the seven years of secondary schooling (World Bank Group, 1968). These enrolment figures imply that whilst Rwanda's literacy rate at independence of 17% was not particularly low for the time or region, most of this literacy would have been in Kinyarwanda rather than French. In chapter 8 I consider how the patterns of literacy promoted during Rwanda's colonial era may contribute to explaining independent Rwanda's dramatic decision to switch from French to English as the MOI of its secondary education system (Samuelson, 2012).

4.5.4 Small states and islands: Gambia, Singapore, Botswana, Lesotho, Equatorial Guinea, Mauritius, Trinidad and Tobago, Jamaica

This section introduces eight states with small populations which became independent in the 1960s. With the exception of Equatorial Guinea, the only country in this study to use Spanish as its official language (Njiale, 2014), they all have an established tradition of using English as the dominant MOI in their state-school systems. However, these British colonies had differences in the way in which other languages were used in formal and informal domains, including: the level of linguistic diversity, the existence of community languages not recognised for use within education by the colonial administration, and the use of high-status language other than English in formal education. These differences shaped the MOI policies used by their British colonial governments.

In linguistically diverse **Gambia** (index of linguistic fractionalization = 0.776), the Education Regulations of 1935 recommended that using vernaculars as the MOI of primary education would aid understanding when compared to the use of English by teachers and students who were not confident users of the language. This recommendation was repeated in the Education Report of 1947. In this respect, the MOI situation in pre-independence Gambia was similar to that in Kenya or Uganda. Despite these recommendations, at independence, whilst

some of the larger regional languages (including Wolof and Mandinka) were being used as MOI in primary school, there had been no formal encouragement or support from the colonial administration to facilitate this and English was the only language supported as an MOI throughout the education system (Thakur, 1969, pp. 295-6,347-8).

In contrast to the Gambia both **Botswana** (formerly Bechuanaland) and **Lesotho** (formerly Basutoland) had comparatively low levels of linguistic diversity (0.387 and 0.091, respectively) (Alesina *et al.*, 2003). In these two countries Setswana (in Botswana) and Sesotho (in Lesotho) were considered to be national languages by the colonial administrators, and they were developed and used as MOI in primary schooling, with English being used as the MOI for any higher levels of education. This strategy of using only one community language for primary education and an European language for secondary education was similar in structure to the MOI policy used in Rwanda by the Belgians.

The development of the colonial-era MOI policies of both Lesotho and Botswana were both influenced by the presence of their economically powerful neighbour, South Africa. Lesotho's territory is completely encircled by South Africa and the aim of the educational policy of colonial Basutoland was to produce migrant manual labourers to work in South Africa. Unlike in British East Africa, the development of an élite educated indigenous ruling class was seen as unnecessary, and possibly even undesirable. Consequently, in the early Twentieth Century SeSotho medium basic primary schools were developed throughout the country but there was very little provision made for intermediate or secondary education. In 1930 there were more than 760 "elementary vernacular schools" but only 28 intermediate schools which taught English and eventually used it as an MOI (Brutt-Griffler, 2002). Whilst this arrangement gave the SeSotho language an official role within the national linguistic market and promoted literacy in SeSotho, it restricted access to English – the official language of Basutoland's highest-level formal domains (Kamwangamalu, 2012).

In Bechuanaland (Botswana) access to English literacy was less tightly controlled than in Basutoland and the aim of the education system was to produce low-level administrators, rather than manual workers. To do this, Bechuanaland had a

transitional MOI policy. In most primary schools Setswana was used as the MOI for the first two or three years of schooling (no other local languages were used), with students then changing to learning through English. Despite recommendations for standardisation made at the beginning of the Twentieth Century, there was a lot of variation in the extent to which SeSotho was used as an MOI in Bechuanaland's primary schools (Mgadla, 2003, pp. 2,5,90-3,128). In some primary schools Setswana was used as the MOI throughout the school, and in a minority of high-fee primary schools (eleven in 1964) English was used as the sole MOI. Unlike in British East Africa, access to these different types of schools was not restricted by race. There were only eight secondary schools in the country at independence and families who could afford to sent their children out of the country for post-primary education (Bagwasi, 2017; UNESCO, 1964, pp. 19–33).

The three small island states of Trinidad and Tobago, Jamaica and Mauritius all have pre-independence histories of having passed from the control of one European power to another, but their mass education systems all began their development when they were British colonies. In the Twentieth Century the populations of these islands were mainly the descendants of slaves and indentured labourers and the education policies of the British administration at that time reflect the lack of respect that was generally given to non-European languages.

In **Trinidad and Tobago** the British administration began to develop a formal education system in 1851. One of its core goals in doing this was to encourage the spread and use of the English language. The reasons given for this were to unify the ethnically and linguistically diverse population (the result of forced immigration through slavery and indentured labour) and to demonstrate Trinidad and Tobago's status as a British colony (Newton & Braithwaite, 1975; Trinidad and Tobago Independence Celebration Committee, 1962). Until well after independence, English was the sole MOI in all of Trinidad and Tobago's schools and the goal of promoting the usage of Standard English above all other languages remained (Carrington, 1976). In pre-independence **Jamaica** the MOI policy of its education system had a similar purpose to that of Trinidad and Tobago's – to promote the use of standard English. This was in spite of the fact

that nearly all of the population used the Jamaican Creole, Patwa, as their home language, English was taught following an "English as Mother Tongue" approach. This assumed that Patwa was a non-standard variety of English and that the role of the teacher and curriculum was to "correct" students' language. The common perception of languages such as Patwa being "ungrammatical" began to be challenged within the Caribbean academic community from the end of the 1950s but the attitude prevailed in schools well into the late Twentieth Century (Devonish and Carpenter, 2007, pp. 227–303).

In **Mauritius**, unlike in Trinidad and Tobago and Jamaica, British pre-independence MOI policies could not ignore the presence of literacy traditions in languages other than English within the national linguistic market. Mauritius was ceded to the British by the French in 1814 and a condition of the handover was that French could continue to be used on the Island. In addition, the abolition of slavery led to many Indians coming to work in Mauritius as indentured labourers and by the start of the Twentieth Century more than two thirds of the population were of Indian descent. This group brought with them their own traditions of literacy (Leclerc, 2021; Miles, 2000; Napal, 2019; Stein, 1997, p. 66; Toth, 1995, pp. 113–117). The MOI policy of the British administration had to accommodate the acquisition of the high-status language, French, and the use of the well-established Indian community languages, whilst at the same time establishing English as the dominant language of the national linguistic market. In the Education Act of 1957 teaching standard English was given as one of the core aims of the school system and the duties of the Minister of Education included ensuring *"the more effective teaching of English and the spread of the English language in Mauritius".* From the fourth year of primary school onwards English was to be the sole MOI in all classes apart from when another language was being taught as a subject – French remained as a compulsory subject. However, for the first three years of primary schooling *"any one language may be employed as the MOI, being a language which in the opinion of the Minister is most suitable for the pupils".* For the most part, this language was Bhojpuri, the lingua franca of the Indian population of Mauritius, though French was also used in some schools. Despite recommendations from a 1941 report on Mauritius' education system that Mauritian Creole be used as an MOI to improve the effectiveness of early primary

schooling, its use continued to be discouraged in schools (Education Act (Act 39 of 1957) Government of Mauritius, 1957, sec. 3,43; Napal, 2020; Stein, 1997).

Like Mauritius, the languages used within pre-independence **Singapore's** schools reflected the fact that the majority of its population were descended from economic migrants. In addition to the indigenous Malays there was a tiny European élite and a small Indian population. What makes Singapore distinctive is that the majority of its population (over three-quarters) were ethnic Chinese, speaking a variety of Chinese languages. In consequence, the privately funded Chinese MOI schools of pre-independence Singapore, with their links to social and economic opportunities in the powerful kin-state China, had a much larger impact on the linguistic market than they did in any of the other cases. Before WW2 the British administration oversaw a fragmented, linguistically diverse, education system. There were government funded Malay-medium primary schools providing basic education. Plantation owners were responsible for funding basic (Indian language MOI) education for the children of their indentured workers. Completely separate to the private Chinese schools, élite English MOI education – aligned to the British education system and essential for entry into colonial administration - was available for the tiny minority who could afford to access it (Federal Research Division: Library of Congress, 1991). This situation demonstrated that, even in the presence of another internationally powerful language (Chinese), status planning can be used to firmly establish a language spoken by only a minority of the population as the dominant language of the linguistic market. After WW2 the British administration gave greater support to education through languages other than English. In 1947 a commitment was made to provide all children with six years of primary education, using the language of their parents' choice as the MOI. The Education Ordinance of 1957 gave parity to the use of English, Chinese, Malay and Tamil as MOI. However, the élite English-medium system continued to receive the most government funding and the Chinese-medium education system continued to rely on private funding. This unequal situation increased political tension between the English- and Chinese-educated sections of the community and language status was a significant issue throughout Singapore's complex journey to independence (Dixon, 2009; Liu & Ricks, 2012). Since independence Singapore's government has made extensive use of language policy as a strategy to create a shared

sense of national identity for its population and to manage the presence of two dominant literary traditions within its linguistic market – Chinese and English. This is an issue which has also been faced by many of the newer states which gained independence after 1990.

4.5.5 The Soviet successor states: Estonia, Latvia, Lithuania,
   Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Ukraine, Belarus

The 1990s was a time of rupture and change, It was the beginning of the era of Education for All (EFA); and the break-up of the Soviet Union (USSR) led to the creation of many new states. The long-term language planning goal of the USSR was to ensure that Russian became the dominant language of the USSR. Different language planning strategies were used to achieve this goal, depending on the characteristics of each state's linguistic market at the time that it was absorbed into the USSR. These strategies included using corpus planning to create standard forms for languages that had previously not been used as MOI within a formal school system; and using status planning to enhance or limit access to educational opportunities through languages which already had a strongly established tradition of being used for teaching and learning. The use of language as a tool for social engineering within the USSR has been held as an exemplar of how language-in-education policy can be used both to improve and to control the life chances and choices of millions of people (Lewis, 1972, pp. 283–293). Soviet language-in-education planners allowed standardised regional languages to be used as MOI as part of a multilingual school system. Providing compulsory education through these regional languages not only increased literacy levels, it also allowed the Soviet administration to control the spread of ideas through literature and the mass-media (Fierman, 2009, p. 1210).

In areas where there was considered by Soviet administrators to be little or no existing formal literary tradition, language planners created standardised forms of regional languages and disseminated them, through newly established compulsory school systems, as the language of the republic. An example of this type of language planning strategy is the creation of a distinct Tajik linguistic identity in the 1920s in order to create a separation between the people of the newly formed Republic of **Tajikistan** and those of Uzbekistan (Curtis, 1997, p. 215; Khudoikulova, 2015, p. 165). At the same time, in **Kazakhstan** language

planning was used to alter and suppress the existing Kazakh-language national identity. In Kazakhstan there already was a limited tradition of Kazakh-language literacy using orthographies based on the Arabic alphabet. This indigenous literacy was seen as a potential threat by the USSR because it enabled links to the Arab-speaking world. In consequence, between 1929 and 1933 the indigenous Kazakh intelligentsia was eliminated and a new official Kazakh language, written first in Latin script, and after 1940 using a modified Cyrillic alphabet was introduced. This approach of using orthography to re-shape the identities associated with a language has some parallels to the corpus planning carried out on Kiswahili in East Africa (Curtis, 1997, pp. 32–33; Dotton, 2016, pp. 16–17, 26–27).

By WW2 levels of literacy in the USSR had increased significantly (Mironov, 1991) and the Soviet education system had played a large part in constructing a series of robust regional linguistic identities which were used in many aspects of formal Soviet administration. Throughout the USSR national schools (which used the regional languages as MOI) were administered alongside Russian-medium schools. These Russian-medium schools were, in general, better resourced than the national schools and offered a wider variety of educational and career opportunities. This inequality in education provision, combined with the compulsory study of Russian as a subject in national schools, worked towards ensuring that the Russian language retained its dominant position within the Soviet linguistic market. This was done, not just by promoting the use of Russian, but also by placing practical restrictions on the utility of previously well-established literary languages, such as those of the Baltic states, which were absorbed into the Soviet Union at the end of WW2. **Estonia, Latvia** and **Lithuania** had all been independent states during the interwar years and all had high literacy rates and strongly established traditions of using their titular languages as the dominant MOI of their school systems. As well as directly restricting the career and higher education opportunities that were available through the medium of the Baltic languages, the USSR also modified its general MOI policy to reduce the strength of the titular languages within the Baltic states. For example, in Latvia Russian and Latvian were the only permitted MOI. This was a tactic designed to assimilate non-Latvian linguistic minorities into the Russian-media education system, creating a larger proportion of Russian-

educated citizens and thus reducing the status and utility of the Latvian language (Batelaan, 2002; Coulby, 1997; Hogan-Brun et al., 2008; Stevick, 2015a). The implementation of the Soviet Education Law of 1958-59, which gave parents the right to choose the languages which their children would learn, and learn through, was widely interpreted as being another strategy for increasing the dominance of the Russian language at the expense of the languages of the republics (Bilinsky, 1962; Silver, 1974).

At independence, the former Soviet states all had near-universal levels of literacy and inherited language-in-education traditions of parallel, but unequal, school systems which offered a choice of using one or more of the regional languages or the dominant colonial language, Russian, as the MOI. In the years leading up to independence all of these states passed legislation which raised the formal status of the titular language of their republic, however this did not automatically lead to Russian losing its status as the dominant language within the national linguistic markets of these states (Pavlenko, 2008b). In Chapter 7 I discuss how states which inherited these MOI policies which accommodated the use of several different high-status languages have modified them and the degree to which (if at all) steps have been taken to reduce the utility and influence of any previously-dominant languages which might be perceived as threatening the status of any new official languages.

4.5.6 Inheritors of the MOI policies of Soviet Satellite States: Croatia, Slovenia, North Macedonia, Slovakia and the Czech Republic

The 1990s also saw the disintegration of two Soviet satellite states, Yugoslavia and Czechoslovakia and my criteria allowed the inclusion of five of the new states formed as a result of this. At independence these states also inherited traditions of allowing the use of other high-status literary languages, in addition to the official language as MOI in both primary and secondary school. Unlike the USSR, where standard Russian had one official form, the official languages of Yugoslavia and Czechoslovakia had more than one standard form in order to accommodate the different literary traditions present in these federated states, whilst still conforming to the meme of being a state united by a common language.

Before independence, Croatia, Slovenia and North Macedonia were all part of Yugoslavia. Prior to WW1 Slovenia and Croatia were part of the Austro-

Hungarian Empire and Northern Macedonia (as part of Serbia) was part of the Ottoman Empire. The influence of these different pre-WW1 ruling powers can still be seen today. The Slovene and Croatian languages are written in Latin script, whilst Macedonian and Serbian are written in Cyrillic – reflecting Catholic and Orthodox written traditions, respectively. The concept of using a common language as a political tool to unify the South Slavs dates back the mid-Nineteenth Century, however no common literary standard was ever agreed upon. In consequence, whilst the national New Language Agreement of 1954 proclaimed the *"national language of Serbs, Croats and Montenegrins"* to be *"one language"* it also stated that all regionally developed standard forms and orthographies to be equally valid (an arrangement that was reiterated in the 1963 constitution). All primary school students in Slovenia and Macedonia had to learn Serbo-Croatian as a compulsory subject, but there was no requirement for Serb or Croat students to learn Slovene or Macedonian. This official position of linguistic unity was not universally accepted and contributed to Serb-Croat political tension (Curtis, 1992; Gawdiak, 1989).

The population of Yugoslavia was linguistically diverse, with many Yugoslavs having strong ethnic and linguistic ties to European kin-states. This influenced the structure of Yugoslavia's education provision. Federal and state education and language laws balanced minority language rights with promoting the use of Serbo-Croatian. They also reflected the treaty agreements that Yugoslavia had made with many of the kin-states of its citizens. In 1945 the Ministry of Education ordered the opening of "minority schools" or language streams, wherever there was demand from more than twenty students. The Federal Education Law of 1958 made it obligatory for children from ethnic minorities to be able to learn through their other tongues. Many of these children followed the curricula and took the examinations of the education systems of their kin-states and the 1958 legislation made all of these education systems equal, this became a federal requirement in 1970.

The new 1974 federal constitution reinforced this right to education in all national languages - including the official languages of the individual states (Curtis, 1992; Ivanova, 2012; Soljaga, 1998; Tollefson, 2002b). This created a situation in which learning through the official language, Serbo-Croatian, was not necessary for

accessing social or economic opportunity. This liberalization of MOI policy was made at a time when demands for greater political autonomy from the individual states were being heavily suppressed by the federal Yugoslav authorities. This decision aligns with Ferguson's description of the granting of language rights as a soft concession. By giving greater, symbolic, recognition to individual state linguistic identities, the official national identity would appear more inclusive, and potentially more acceptable to groups which felt disenfranchised – without the need to make concessions over larger political issues which would lessen the power of the federal authorities (Ferguson, 2006).

North Macedonia was the most underdeveloped region of Yugoslavia. Formerly part of the Ottoman Empire, after WW1 it was first administered as part of Serbia. Whilst the Macedonian school system had the same high degree of MOI freedom as the rest of Yugoslavia, the Serb dominated administration promoted the standardisation and use of Serbo-Croat over the development of the Macedonian language. It was not until 1945, when Macedonia separated from Serbia and became a federal state that an official alphabet was established for the language. In the 1980s the Macedonian administration used school language policy as a strategy to assimilate the large Albanian minority group, which were perceived as a threat to Macedonian identity. The number of hours of Macedonian-language lessons in non-Macedonian MOI schools was increased and it was made increasingly difficult for secondary schools to teach using Albanian as the MOI (Franolic, 1980; Spolsky, 2004, p. 155).

In contrast to Macedonia, well before the beginning of the Nineteenth Century, the languages of both **Croatia** (Croatian) and **Slovenia** (Slovene) were widely used as media of instruction and also taught as subjects in schools. In Croatia higher education was available through Croatian from 1850 (Sočanac, 2012; Sujoldžić et al., 2012) and in 1907 Slovene replaced German as the MOI of Slovenia's grammar schools and it was possible, after the founding of the University of Ljubljana in 1919, to get a full education using Slovene as the MOI (Ministry of Education and Sport - Slovenia, 2008). In the 1980s secondary school education was available in Croatia through Croatian, Serbian and Slovene, and at least ten other minority languages. Despite Croatia's violent transition to independence, this situation of allowing the use of multiple languages as MOI in

all levels of education has been retained by independent Croatia (Hodges et al., 2016; Sočanac, 2012).

Slovenia's own MOI policies were designed to maintain the dominant position of the Slovene language within its internal linguistic market. One strategy used to accomplish this was to actively support the right for minority groups, particularly Italians and Hungarians (and before WW2, Germans), to access education through their own languages, whilst requiring them to learn Slovene, in addition to Serbo-Croat, as a compulsory subject. By minimizing the use of Serbo-Croat within the Slovene school system as an MOI, this policy protected the status of the Slovene language (Ministry of Education and Sport - Slovenia, 2008; Novak-Lukanovič & Limon, 2012).

From the end of WW1 until 1993, the **Czech Republic** and **Slovakia** were united as Czechoslovakia. The national language of Czechoslovakia was the "Czechoslovak" language having two forms: Czech and Slovak. These were officially equal in law but Czech was the dominant language. Like Yugoslavia, Czechoslovakia supported the use of minority languages as MOI within its state-education system. Prior to WW1 both Slovakia and the Czech Republic were part of the Austro-Hungarian Empire, but their linguistic markets and the status of the Czech and Slovak languages in relation to German and Hungarian – the languages of empire – developed differently. In Czechia, by 1882, it was possible to get a full education in the Czech language, though fluency in German was still necessary for social advancement. In contrast, in Slovakia the 1868 Nationalities Act made Hungarian the sole official language. In the years following this all Slovak-medium secondary schools were closed; a standardised Hungarian-medium education system was introduced, compulsory for all six to twelve year olds; and Slovak cultural and linguistic activities were suppressed. Despite these aggressive status planning measures, the use of Hungarian did not spread widely through the, mostly rural, Slovak population as school attendance was low. However, it did suppress the development of the Slovak language as a high status language of opportunity ("Austria-Hungary. Britannica Academic.," n.d.; Gawdiak, 1989).

Between 1960 and 1968 Czechoslovakia transitioned from a unitary to a federal state. The right to education in their own language for recognised minorities was retained in the federal constitution of 1968, provided that a minimum number of school-age children were present in a region. This document also defined Czech and Slovak as the equal (and interchangeable) official languages of the federation. Because Czech and Slovak were officially considered to be mutually intelligible, it was not considered necessary to establish Czech-medium schools in Slovakia, or vice versa. In Chapter 7 I consider the impact of the suppression of the development of Slovak linguistic identity on Slovakia's post-independence MOI policy.

4.5.7 New states with violent transitions to independence: Namibia, Eritrea, Timor Leste

The post-independence MOI policies of three of the youngest states were shaped by having several changes of rule during the Twentieth Century. All three countries had violent transitions to independence and their post-independence MOI policies show the influence of the countries which supported their decades-long independence movements.

Eritrea was an Italian colony from 1890 until 1941, when British forces occupied it. It was briefly administered by Britain as a United Nations trust territory until 1952 when the UN voted to federate Eritrea with Ethiopia as an autonomous state. In 1962 Ethiopia annexed Eritrea, turning it into a province. This led to a 30-year independence war (BBC, 2018b). Both Eritrea and Ethiopia have long established indigenous literary traditions based on the ancient Ge'ez language. This language is considered to be the parent language of Tigre and Tigrinya (spoken in Eritrea) and Amharic (the official language of Ethiopia). At each period in its colonial history, the occupying forces used school language policy to shape the identities of Eritrea's citizens.

Under Ethiopian rule, the use of all Eritrean languages, particularly Tigrinya and Arabic (the use of which was encouraged under British rule), was banned in state-controlled domains, including schools and the media. Following the pattern in the rest of Ethiopia, Amharic became the sole MOI for primary school, with English being used for secondary and tertiary education. After 1976, following the

overthrow of the Ethiopian Emperor Haile Selassie in a military coup, some limited use of local languages was permitted in basic education, but Amharic continued to be the dominant MOI of primary education. During the war for Eritrean independence, the Eritrean liberation movements used Eritrean languages, predominately Tigrinya and Arabic, as symbols of resistance (Hailemariam, Kroon and Walters, 1999; Bereketeab, 2010).

Like Tanzania, before WW1 **Namibia** was a German colony. Afterwards it was administered by South African for Great Britain under a League of Nations mandate, which continued the German policy of restricting access to education for non-White children. In 1948, the ruling National Party of South Africa refused to recognise the UN's authority to supervise the administration of Namibia. Namibia was absorbed into South Africa and administered under its system of apartheid. This created an administrative situation similar to Ethiopia's appropriation of Eritrea. However, unlike Ethiopia's assimilatory language policy – which sought to replace languages associated with Eritrean identity with Amharic, the South African MOI policy used Namibia's community languages in education as part of a strategy to restrict access to higher levels of (Afrikaans- and English-medium) education for non-White students. In 1958 fewer than 30% of Black children of school-going age were in school and fewer than 20% of those who completed four years of primary school progressed to higher levels of education. The Native Language Bureau was established in 1963 and effort was put into corpus planning for community languages to be used as MOI in four-year primary schools for Black children. The official languages, English and Afrikaans, were used as MOI in all post-primary education

The apartheid system was officially abolished in Namibia in 1979 and, under the National Education Act (No. 30) of 1980, all schools began to offer the Cape syllabus, previously only used in White schools. However, in reality schools continued to be segregated and education for Black students got significantly less funding that that for White students. Access to higher levels of education depended upon having a good command of either English or Afrikaans, so this excluded most Black students from participating.

The United Nations gave official support to Namibia's independence movement from 1967. In 1975 Namibia's resistance movement, the South West African People's Organisation (SWAPO) proposed a constitution for an independent Namibia in which English would be the official language, replacing Afrikaans – the language of oppression. This plan was given international support by the United Nations Institute for Namibia, established in 1976. Much of the education provision for the large populations of Namibian refugees living outside of the country was funded and administered by British and USA aid money. This included a British teacher training programme for Namibian English teachers (Brock-Utne, 1997; Cohen, 1994; Fourie, 1997; Frydman, 2011; Ministry of Education and Culture Namibia, 1992).

Timor Leste is the newest independent state in this study. Timor Leste came under systematic Portuguese colonial control from the 1860s. The Portuguese colonial policy was similar to that of the Belgians in Rwanda-Urundi, ruling indirectly through pre-existing power structures, with an élite group of Portuguese-educated Timorese permitted to become full Portuguese citizens. Unlike Rwanda, Timor Leste is a highly linguistically diverse country and Portuguese was used as the official language of the whole education system and also promoted by the Catholic church. Although having few similarities to the French in its approach to administering its colonies, the Portuguese ideology of the necessity of the use of the Portuguese language for "development", resembles the role given to the French language in France's 'mission civilisatrice'. Separate to the education system for Timor Leste's indigenous population, the Portuguese administration tolerated the development of a private Mandarin-medium schooling system by Timor-Leste's small Chinese community with the proviso that Portuguese was taught as a subject to all students. Overall, access to higher levels of education was highly restricted. The first high school was opened in the capital, Dili, in 1952, using Portuguese as its sole MOI and offering a very few students a pathway to studying at university in Portugal.

This tiny élite of Portuguese-educated graduates formed the core of Timor Leste's independence movement and established the first political parties in the 1970s in anticipation of the bureaucratic process of Portugal giving up colonial control of Timor Leste. These political parties used both Tetum (a trade language

which functioned as a lingua franca) and Portuguese in their campaigning. The FRETLIN party, which had adopted Portuguese as its official language but also promoted the development of all of Timor Leste's traditional languages, declared Timor-Leste independent on 28th November 1975. Ten days later, Indonesia invaded, uniting East (Timur) and West (Barat) Timor and declaring the island, Timor-Timor, to be the 27th Province of Indonesia.

Indonesia used violence and education to impose a dramatic change on Timor Leste's linguistic market. The spread of the use of bahasa Indonesia through education and its promotion as a symbol of independent national unity was a core part of Independent Indonesia's own state-building strategy and this process was applied aggressively to Timor Leste in order to assimilate the population into its new Indonesian identity. To promote the acquisition of bahasa Indonesia, there was a concerted programme of school building. By 1985 nearly every village had a primary school, mostly staffed by Indonesians, and using an all-Indonesian MOI. However, the quality of education was poor and literacy rates remained much lower than in the rest of Indonesia, in 1990, less than half of 15-19 year olds had completed primary education.

From 1981 the use of the Portuguese language was banned in all public domains, including churches, In consequence, the Catholic church developed a liturgical form of Tetum, Tetum Ibadat. Given the wide reach of the Catholic church in Timor Leste, this raised the status of the trade-language considerably. By the 1990s, when bahasa Indonesia had been established as a common language of communication, the all-Indonesian MOI policy was relaxed slightly and Tetum was allowed to be used as an MOI in the lower grades of Catholic primary schools in Dili. Outside of Timor Leste, the exiled resistance movement was supported by Portugal and other Lusophone states, particularly Brazil, which developed the importance of the Portuguese language as an expression of independent Timorese identity.

Just as Timor Leste's independence from Portugal was precipitated by major political change in Portugal, the timing of its independence from Indonesia was linked to the collapse of the Suharto regime in Indonesia. The East Timorese were offered a referendum in 1999, in which nearly four fifths of the population

voted for full independence from Indonesia. This result was followed by extreme violence against the Timorese population, instigated by the departing Indonesian troops. There then followed a period of UN Transitional Administration and Timor Leste finally achieved full independence in 2002, In chapter 6 I discuss how Timor Leste's complex and violent colonial history, has shaped its post-independence MOI policy (Government of Timor Leste, n.d.; Taylor-Leech, 2009).

4.6 Summary of pre-independence MOI strategies

In this chapter I introduced the cases in order of their date of independence, rather than grouping them by colonial power, as a strategy to make it easier to see similarities between the pre-independence MOI policies of countries with different pre-independence powers and to highlight where a particular colonial power used different MOI policies in different territories. From this exploration I concluded that comparing patterns of *how* languages were used as MOI, rather than *which* languages were used as MOI gave better insight into how MOI policies supported and re-enforced the control that pre-independence powers had over access to social and economic opportunity in their territories. In Table 4-2 below, I group together the post-WW2 policies of the different pre-independence powers according to their patterns of language use.

I identified five broad strategies for using different languages as MOI. These range from single-language policies (5) where only the use of the administration's official language is supported, to policies where both primary and secondary education may be accessed through a variety of different languages (1). Between these two extremes are policies which transition between using one or more lower-status languages as the MOI for part (or all) of primary school to then using a higher-status official language as the MOI for secondary education (2, 3, 4). In my descriptions of the pre-independence MOI policies, I discussed how managing access to literacy, particularly in the official language, was used as a way of strengthening the rule of the pre-independence power by controlling access to political and economic opportunities. This aim was achieved through different routes, depending upon the social, economic, and linguistic conditions of each territory.

Description of MOI strategy	Pre-independence power	cases
(1) Both the official language and other languages may be used as MOI in both primary and secondary school	USSR	BLR, EST, KAZ, KGZ, LVA, LTU, TJK, TKM, UKR
	Czechoslovakia	CZE, SVK
	Yugoslavia	HRV, SVN, MKD
	Britain	SGP
(2) Several local languages are used as MOI in primary school. Only the official language(s) is used as MOI for secondary school	Britain	CMR, ERI, GMB, GHA, KEN, MUS, UGA, ZMB
	Netherlands	IDN
	South Africa	NAM
(3) One language is used as MOI in primary school. A different, higher-status, official language is used as MOI for secondary school	Britain	BWA, LSO, TZA
	Ethiopia	ERI
	Belgium	RWA
(4) Limited use of local languages is tolerated in basic education. The official language is sole MOI for upper primary and secondary school	Britain	NZL, TTO
	Indonesia	TLS
(5) Only the official language is used as MOI in both primary and secondary school	France	BEN, BFA, CMR, CIV, GAB, SEN, TGO
	Spain	GNQ
	Britain	JAM
	USA	PHL
	Japan	KOR
	Portugal	TLS

Table 4-2 MOI policies strategies used by pre-independence powers after WW2.

Some policies, such as those in French Africa (5) and Indonesia in Timor Leste (4), actively promoted the acquisition of the dominant language of the colonial power, whilst others, such as the Belgian policy in Rwanda and the British policy in Lesotho restricted access to the dominant language by using a lower-status language for basic education (3). Even when literacy rates and school attendance were very low, proficiency in the language(s) used for schooling (particularly in secondary school), was a requirement for access to most high-status employment opportunities. Where there was little tradition of literacy in other languages this meant that even non-speakers would recognise the language of schooling as the dominant language of the national linguistic market. In countries where there were established literary traditions besides those of the ruling administration several different strategies were taken to control the influence that

those other high-status languages might have on the territory's linguistic market. If a language was perceived as threatening the status of the colonial language then its use could be restricted. An example of this is Indonesia's banning of the use of the Portuguese language in all public domains in Timor Leste (4). Alternatively, whilst a variety of languages may be allowed to be used as MOI in both primary and secondary school, access to the most prestigious educational and employment opportunities would only be made available through the dominant language. This latter strategy was widely used in the USSR (1).

The MOI policies of these pre-independence school systems and the degree of participation in, or access to, schooling before independence shaped the linguistic market each state inherited at independence – and created the conditions against which post-independence MOI choices were made. After independence, which is the point at which my analysis begins, each new state began its process of building a new official national identity, which included deciding upon, and encouraging the use of, an official, or national language(s) (Bourdieu and Wacquant, 1992, pp. 94–114). For the policy makers of newly independent states such as Kenya and Tanzania, which had high levels of linguistic heterogeneity and low levels of literacy, these choices were often influenced by patterns of literary language use established in the pre-independence era. However, this was not always the case. Indonesia, another state with high linguistic diversity and low levels of literacy at independence, rejected the language of its colonial-era government and adopted the language of the independence movement, bahasa Indonesia, as its official language and the MOI of its state-education system (Wright, 2004, pp. 90–92).

Not all of the states fit the model of being without a distinct, national linguistic identity at independence. Some, such as Korea and the Baltic States already had traditions of using a well-developed national language as a common MOI within their education systems before they were colonized (Iwaskiw, 1996; Song, 2012). In these states their post-independence linguistic state-building policies have been shaped by a need to manage a different form of language diversity. That is, the presence of other high-status languages within their linguistic market (Japanese and Russian, respectively) that also had a tradition of being used as MOI within their school systems.

The language planning decisions involved in creating the post-independence linguistic identities of my cases were not a single, top-down, event. In my analysis of post-independence MOI policy I take into account how changing circumstances, both within states and across the international linguistic market can be considered to have influenced the MOI policy trajectories of each state.

4.7 Conclusion

In this chapter I described and justified my case selection strategy. I introduced the 42 cases by describing the MOI policies of their pre-independence education systems. I showed how these MOI policies were used by pre-independence administrations to establish the dominance of particular languages within the pre-independence national linguistic market and also to control access to positions of power and economic opportunity. These actions created the national linguistic markets which new states inherited at independence. I discussed how, in order to represent the influence of pre-independence MOI policies on post-independence MOI choices, it is more useful to group states according to the ways in which languages were allocated roles within their pre-independence MOI policies than by the names of the pre-independence powers. The patterns of language use that I identified in the pre-independence MOI policies influenced my approach to categorizing post-independence MOI choice, which I describe in the next chapter.

5 Results: MOI policy typology

In this chapter I discuss how I used case data, exemplars of MOI typologies from the literature, and theoretical knowledge to identify and define a novel model of four distinct types of MOI policy strategy: Purist, Pragmatic, Accommodating, and Opportunistic, which describe a state's primary and secondary school MOI policies in terms of their overall language policy aim. I then present the calibrated data on MOI policy choice, and show how each state's MOI policy has changed over time.

5.1 Identifying and defining QCA outcome sets

As I discussed in chapter 2, whilst the existing language policy typologies in the academic literature capture some of the features of MOI policy which I am interested in, they could not be applied directly to this study. The novel MOI policy typology which I use emerged from a cyclical process of inspecting case data, identifying and defining case characteristics, building truth-tables, and analysing their output.

A good classification system is unambiguous, reduces irrelevant complexity and facilitates the testing of theory and the identification of relationships. The criteria used to classify cases must be related to theory and create a typology that encompasses all cases, with enough categories to ensure that cases within each group share a meaningful degree of similarity, but not so many categories that the typology becomes unusable (Bailey, 1994, Chapter 1; Collier et al., 2012, pp. 217, 222–223). In this global comparison of primary and secondary school MOI policies in new states I consider MOI policies from the perspective of their role as tools for supporting linguistic state-building and explore whether patterns of MOI choice can be explained using the concept of national and international linguistic markets. To do this I needed to develop a typology for describing different types of MOI policy that:

- could be applied unambiguously to all countries in this study;
- was applicable to MOI choices made at all periods of time in this study;
- could capture an education system's overall MOI policy for both primary and secondary education;
- made connections between the MOI policy, the state's linguistic market, and the wider international linguistic market.

5.2 Describing and comparing language types

My reading of the case data suggested that when additional, non-official, languages are used as MOI, languages perceived as having a high status (for example, those used as an official language in another country) are given different roles to languages regarded as having a relatively low status (for example, a local language only spoken in one region of a country). This observation led me to begin my development of a classification system for MOI policy by comparing the status of a country's official language(s) relative to that of other languages present within the country's linguistic market, and also to other languages within the wider international linguistic market.

An issue which complicated my selecting definitions of language status for this study is that languages can be described in relation to the laws of the state, or an individual's language repertoire, or patterns of global language dominance and use. (Kaplan & Baldauf Jr., 1997, pp. 13–27). I needed to develop a strategy to include language status within my analysis of MOI policy type which accommodated the change in status which languages can experience when they are used within the linguistic markets of different states (Blommaert, 2010).

In addition, commonly used terms to describe particular types of languages can have different meanings in different places. An example of this is the term "mother tongue" – the use of which is highly contested. As well as carrying with it connotations of low status when compared to "official languages", the term is used in different ways in different countries. For example, within the Singaporean education system there are three languages with the official status of "mother tongues" - Mandarin Chinese, Tamil and Malay – representing the official linguistic identities of the Chinese, Indian and Malay communities, respectively. Every student (with some flexibility permitted for the Indian community since

1990) must study the "mother tongue" assigned to their official ethnic identity as a compulsory examined subject, regardless of the language (or languages) that they actually use at home (Jain & Wee, 2019; Sim, 2016). By contrast, within Timor Leste's education system "mother tongues" are described as being the language which a child uses at home, though their use as languages-of-education is still in development and corpus planning (standardization) issues are cited as a barrier to this (National Education Commission, 2011).

I have avoided using the term "mother tongue" as it does not provide an unambiguous description of a language's status. Taking the example of Singapore, whilst the Malay language has the status of "mother tongue" in Singapore, in Brunei, Malaysia and Indonesia the Malay language (or closely related variants of it) have the status of "official language". Instead, I have chosen to use the umbrella term "community language" to refer to all languages present within a country's linguistic market and I then add further status descriptors ("official", "language associated with a kin-state", etc.) to the term as needed.

To be effective, any strategy that I used to compare the relative statuses of languages needed to be able to accommodate the concept that the status of a language depends not only upon the country in which it is being used but also on the status that it holds in other countries. For example Hungarian is used as a medium of instruction in both Hungary and Slovakia but, whilst in the former Hungarian is the language-of-state, in the latter it is the language of a minority group. So, whilst Hungarian is used as an MOI in Slovakia, it is not a language of national administration and government. However, in Slovakia Hungarian still holds a higher status to the Roma language. Although the Roma language is spoken across many countries, it is not the official language of any sovereign state and so has a lower status than both Slovak and Hungarian within the international linguistic market (Škrobák, 2009a). As a further example, both Kenya and Abu Dhabi use English as a medium of instruction but, whilst in Kenya English is an official language, in Abu Dhabi English has no formal status and is promoted as a language of science and international communication (Gallagher, 2011). In both examples two countries are using the same language for teaching and learning but for different reasons. In addition, if two languages have the same legal status in a state, this does not mean that they hold equally important positions within that state's linguistic market. Since 2010, in Kenya, Kiswahili and

English both have the status of official language and can be used for conducting parliamentary business. However, English remains the dominant language of education, and the only language in which the national school-leaving exams can be taken in, thus controlling access to professional careers. Due to this, despite their equal legal status, English retains a higher status within Kenya's linguistic market (Kenya's Constitution of 2010, 2010; Basic Education Act, No.14, 2013; Kelman, 1971).

To make consistent and reliable comparisons between the roles that different languages play in MOI policies I needed to take into account the structure of the national linguistic market in addition to the wider international linguistic market. Both of these factors are involved to an extent in Lewis and Simon's Expanded Graded Intergenerational Disruption Scale (EGIDS), which measures, on a scale of 0 (international) to 10 (extinct), a language's status in terms of how widespread its use is and whether this usage is expanding or contracting (Table 5-1). The EGIDS is an extension of work done by Fishman and is commonly used in research related to the effectiveness, or feasibility, of policies for the use of minority languages (M. P. Lewis & Simons, 2010; Spolsky, 2021). The descriptors of the upper levels (0-5) reflect the two-way relationship between high official status (including being used as a language of education) and high status within the linguistic market. I found the EGIDS helpful for rating the status that a country's official language would have in the international linguistic market compared to any other languages used within that country's linguistic market. Thus providing a way to evaluate the "threat" that other languages may be perceived as posing to that country's official language. I could not, however, use the EGIDS directly to describe and compare the status of the languages involved in each country's MOI policy as the legal status of each language changes, depending upon the country in which it is being used.

EGIDS level	Descriptor
0. International	The language is used internationally for a broad range of functions.
1. National	The language is used in education, work, mass media, government at the nationwide level.
2. Regional	The language is used for local and regional mass media and governmental services.
3. Trade	The language is used for local and regional work by both insiders and outsiders.
4. Educational	Literacy in the language is being transmitted through a system of public education.
5. Written	The language is used orally by all generations and is effectively used in written form in parts of the community.
6a. Vigorous	The language is used orally by all generations and is being learned by children as their first language.
6b. Threatened	The language is used orally by all generations but only some of the child-bearing generation are transmitting it to their children.
7. Shifting	The child-bearing generation knows the language well enough to use it among themselves but none are transmitting it to their children.
8a. Moribund	The only remaining active speakers of the language are members of the grandparent generation.
8b. Nearly Extinct	The only remaining speakers of the language are members of the grandparent generation or older who have little opportunity to use the language.
9. Dormant	The language serves as a reminder of heritage identity for an ethnic community. No one has more than symbolic proficiency.
10. Extinct	No one retains a sense of ethnic identity associated with the language, even for symbolic purposes.

Table 5-1 Expanded Graded Intergenerational Disruption Scale (EGIDS), adapted from Lewis & Simon (2010)

5.3 Creating a typology for MOI policy: language function approach

Since one of the purposes of this study is to investigate how MOI policies have changed over time, I initially assumed that I would compare MOI policy decisions as cases (with the date at which they were made as one of their case characteristics). I began by considering how each new MOI policy had changed the overall MOI strategy of the school system, asking the question, *"In the context of the state in which this MOI policy change has occurred, which type of language has seen the greatest increase in its role as a medium of instruction within mainstream schooling?"* To describe language types in terms of their relationship to a country's linguistic state-building project I used a modified version of Spolsky's three layers of influences on language type and function and the EGIDS (Spolsky, 2004, pp. 219–221, 2021) to derive three functions, or

characteristics, that a language may have when it is considered in relation to the linguistic market of state in which it is used:

- **State** – the language is privileged with formal status in the state – it is used in government and/or the judiciary [for high-level administration] and is probably described in law as an "official" or "national" language.
- **Community** – the language is used by, or associated with, a particular group of citizens within the country. It may, or may not, be associated with a kin-state.
- **International** – the language is privileged with formal status in a different state.

Whilst these types provide easily recognizable descriptions of the functions associated with (or ascribed to) languages used for teaching, they are not mutually exclusive. For example, in New Zealand the English language can be considered to possess all three of these characteristics. Also, as discussed in the previous section, the function (or functions) that a standard named language fulfils will depend upon the political and linguistic circumstances of the state in which it is being used. Since these functions are non-exclusive, this meant that I could not use them to directly create a typology of MOI policy choice. However, I could use them to construct a truth-table that I could then use to create a typology of distinct and mutually exclusive categories. This approach was inspired by Dumas, Méhaut and Olympio's use of truth-tables to create a typology of European models of post-compulsory learning (2013, p. 57), and is an extension of Collier, LaPorte and Seawright's recommendation that typologies should be constructed from binary variables to create multidimensional matrices of case types (2012, pp. 222–223).

Using the three language functions created an eight-row truth-table (Table 5-2), with each row corresponding to one of the potential combinations of characteristics that the language whose use had been most increased by the MOI policy change could possess. Eight was too many types to be used as outcomes, so I grouped some of the truth-table rows together to create a manageable and useful typology of three, theoretically distinct, outcome types: state-building; globalising; and multicultural. (The final row was considered to be an empty set for the purposes of this analysis and was ignored).

Language type whose use has been most increased by MOI policy change			
State	**Community**	**International**	**Outcome**
S	C	I	**state-building** (e.g. English in the UK)
S	C	-	**state-building** (e.g. Lithuanian in Lithuania)
S	-	I	**state-building** (e.g. Portuguese in Timor Leste)
S	-	-	**state-building** (e.g. bahasa Indonesia in Indonesia)
-	C	I	**multicultural** (e.g. Russian in Lithuania)
-	C	-	**multicultural** (e.g. MTs in Timor Leste)
-	-	I	**globalising** (e.g. English in Abu Dhabi)
-	-	-	-

Table 5-2Typology truth-table of MOI policy outcomes based on language functions.

State-building MOI choices align with the use of education systems to promote the use of the language-of-state, thus reinforcing its dominance within the national linguistic market. The presence of multicultural MOI policies, which increase the use of both high and low status languages, can be interpreted as evidence of the influence of international attitudes towards best-practice in MOI policy. The globalising MOI policy outcome reflects interactions between the national and international linguistic markets. Whilst the multicultural and globalising MOI policy types do not directly contribute towards linguistic state-building through the promotion of homogeneity within formal linguistic domains, they can still be interpreted as promoting state-building if the increased use of languages other than the language-of-state results in potentially disruptive community groups feeling more satisfied by the education system (World Bank, 2005, p. 37).

I ran into many problems when I attempted to categorize my MOI policy changes using this typology, which I first thought could be resolved by clarifying the descriptors of language characteristics. For example, the Czech Republic's policy of promoting the option of bilingual Czech-International MOI schooling is, on the surface, a "globalizing" MOI policy type, yet it is used by the German-speaking minority as a strategy for accessing Czech-German MOI education, which is more "multicultural" in character (Eurydice, 2019a). After some experimentation, I came to realize that, for the purposes of my research, this typology had a major limitation – it described the change in the MOI policy but not the context within which it occurred. For example, Tanzania's 1967 decision to make Kiswahili the sole MOI in primary schooling did not remove English from

its position as the dominant MOI of the Tanzanian school system (Rubagumya, 1986, p. 284). Additionally, by considering my cases to be incidences of MOI policy change, I had no simple way of identifying comparable negative cases and this severely restricted the meaningfulness of any analyses which I carried out. This led me to reconceptualize my cases as countries, rather than MOI policies and to compare MOI policy choices at multiple points in time to capture the potential influence of changes to the global linguistic market and models of educational best-practice.

It became increasingly apparent to me that the presence (or absence) of some choice or diversity in the languages permitted to be used an MOI seemed to be a more manageable (and insightful) way of classifying and comparing MOI policy choices than attempting to describe changes in the types of languages (state, international, community) being used. However, I still felt that the relative positions of languages within the international linguistic market needed to be taken into account to understand MOI choices. So when I constructed truth-tables to explore the relationships between case characteristics and particular MOI policy outcome sets I included characteristics to represent the concept of relative language status.

5.4 Creating a typology for MOI policy: degree of choice approach

For this study I am using the term "language choice" to indicate the existence of more than one language route through the state education system. I am not using it to imply that individual students have a free choice of which languages they will learn through. MOI choice is present when there is more than one language route supported through the state education system. Official support for the use of more than one language for teaching and learning does not automatically indicate that there is MOI choice. For example, in Rwanda at independence all students learnt in Kinyarwanda for the first 3 years of primary school and then transitioned to using French as the MOI for the rest of their school career. There was no MOI choice in the system as all students followed the same language route (Samuelson & Freedman, 2010, p. 193). In contrast, in Malawi at independence there were two language routes through the school system – with students in the

North using Citumbuka and those in the South using Nyanja (later renamed Cicewa) as their MOI in early primary school, before they all transitioned to using English as the dominant MOI (Kamwenda, 1997, p. 39).

My initial attempts to develop a typology of MOI policy types, led me to the conclusion that it was not feasible to design a workable typology which distinguished between the amount of language choice allowed within an MOI policy, and the relative status of the languages used, and also the time when the policy was adopted and in use. My solution was to create an MOI policy classification system based on degree of language choice alone. This did not mean that I discarded consideration of the influence of time and the linguistic market on MOI policy choice. Rather, I took advantage of the flexibility of QCA as a framework for analysis and moved the indicators of these factors to other components of the analytical process. I integrated the influence of language function and relative status into my analysis by using them as case characteristics in my truth-tables, and analysed the data in longitudinal waves in order to account for and investigate the influence of time on MOI policy choice.

To create the typology which I used to classify the case data for this study I abandoned the truth-table strategy and, instead, took an indirect approach to grouping MOI policies. I first created two multi-value scales, one for measuring the degree of language choice available in primary school and one for the choice of MOI available in secondary school. Some states, such as Slovenia (Eurydice, 2019c), organise their schooling provision into "basic schools" for combined primary and lower-secondary schooling, with separate institutions providing upper-secondary education. To ensure comparability between my cases I considered schooling provision coded as ISCED 1 to be primary schooling and that coded as ISCED 2 or 3 to be secondary schooling (UNESCO - UIS, 2012). Tables 5-3 and 5-4 show the "Primary Choice" and "Secondary Choice" scales which I developed to describe the amount of MOI choice supported by each country's MOI policy. Using these scales I can, for any point in time, compare the degree of choice in language of instruction allowed by current MOI policy regulations across all cases. I combined and calibrated these two scales to define the MOI policy types which I used as outcome sets for my analysis.

To ensure consistency of coding, I collected and coded data on my cases in batches of 5 to 9 countries from similar geographical regions. After I had completed each batch of countries I reviewed and adjusted my coding of policy changes. I also reviewed the wording of the scale descriptors so that they better reflected common wordings in MOI policy statements. When I had coded all of the data I then compared my coding across batches to ensure that my coding decisions were comparable between, as well as across, regions. The number of levels in each of the scales was determined by the data and indicates the finest level of distinction that I felt I could confidently and reliably make between the degree of MOI choice offered by all the countries included in this study and across the entire period covered by it. Table 5-5 summarises this coding of MOI policy data.

I coded primary and secondary MOI policies separately because patterns in my case data suggested that reasons given for, and risks perceived to be associated with, offering MOI choice in these two levels of schooling are quite distinct. Very often these differences are related to the relative statuses of the languages involved. For instance, in cases coded as having MOI choice in primary school only, such as Ghana's 1970 MOI policy, it is likely (but not definite) that the languages being used as MOI in early primary school are low-status community languages. In contrast, cases coded as offering MOI choice in both primary and secondary school, such as Ukraine in 1991, are often associated with the accommodation of a community language which has a relatively high status because it is also the language-of-state of another country (a kin-state language). It is unusual for a state to allow choice of MOI in its secondary schools and not in its primary schools. In fact the only occurrence of this combination in my data set is in Rwanda between 1996 and 2008, reflecting Rwanda's transition of allegiance from the Francophone to the Anglophone community after the genocide of 1994, which I discuss in Chapter 8 (Pearson, 2014, p. 41).

0 =	No choice in MOI is condoned or supported by the government – this includes systems (such as Botswana between 1977 and 1997) in which a combination of a national language and a dominant LWC is used by all students (Kamwendo & Seretse, 2015).
1 =	Unsupported informal MOI choice is tolerated, or, as in Burkina Faso there is a tentative pilot study exploring the use of MOI choice (Leclerc, 2015), or, as was the case with Trinidad and Tobago's 1975 primary school curriculum, the use of community languages is condoned "to aid understanding" (MoEC, 1975, p. 8), or as in Benin there is general legislation which allows community languages to be used as MOI but no specific policy implementation details (Orientation de l'Education Nationale En République Du Bénin, 2003a).
2 =	Up to two years of supported MOI choice, or, as with Mauritius from 2006, the use of community languages "to aid understanding" or "to develop literacy" is promoted as best-practice (MoEHR (Mauritius), 2006, pp. 8–10).
3 =	Legislation allows for 3 – 5 years of supported MOI choice, as in Eritrea (Rena, 2014), or (as in Latvia from 1998) minority MOI primary schools are expected to become dominant-minority bilingual schools with several subjects required to be taught in the state's official language (Hogan-Brun et al., 2008, pp. 553–554).
4 =	Full primary schooling (at least six years) is available in more than one MOI for all non-language subjects – as with the MOI policy of Cameroon (Nana, 2013, p. 66).

Table 5-3 "Primary Choice" scale

0 =	There is no choice of MOI in secondary school. This includes systems where an additional national language, common to all students, is used in mainstream secondary schools as the MOI for certain subjects, as in the Philippines from 1974 (Gonzalez, 1981, p. 54).
1 =	There is some choice of MOI in secondary schools for students who use a language other than the language-of-state as their MOI but there is a requirement (or strong promotion) to use the language-of-state for certain subjects as has been the case in Estonia since 2007 (Khavenson & Carnoy, 2016, p. 184). Or, there is (as in Indonesia's "national plus" schools) the option to use an international language, in addition to the dominant MOI, as the MOI for some subjects (Zacharias, 2013).
2 =	It is possible to complete, and graduate from, secondary school using a language other than the language-of-state as the MOI for all non-language subjects. The choice of languages used as MOI may well be limited. At independence all the ex-Soviet states had this type of MOI policy.

Table 5-4 "Secondary Choice" scale

5.5 Transforming the "primary choice" and "secondary choice" scales into descriptions of MOI policy outcome strategies

When combined, the five-point primary choice and three-point secondary choice scales give a total of 15 potential combinations of overall MOI policy for school systems. After I had calibrated my case data using these scales, I ran exploratory analyses to see which combinations were present in my data, and whether these combinations changed over time. I identified three distinct crisp-set groups in my data, which I labelled "Purist", "Pragmatic" and "Accommodating". Each MOI policy belonged to just one of the groups. The group names reflect my interpretation of MOI policies as contributing to linguistic state-building strategies and how these need to respond to the linguistic market in which they are used. I defined the three groups as follows:

- **Purist.** Only the official state language(s) are used as MOI throughout primary and secondary education. There is no (or very little) MOI choice allowed or supported. Primary choice = 0 or 1; secondary choice = 0.
- **Pragmatic.** Community languages are used as MOI in primary schooling but only the official language(s) are used as MOI in secondary school. Primary choice = 2, 3, or 4; Secondary choice = 0.
- **Accommodating.** Community languages (which often have a relatively high status within the international linguistic market) are used as MOI within both primary and secondary school. Or there is some choice in the MOI used for secondary schooling. Primary choice = 0, 1, 2, 3 or 4; Secondary choice = 1 or 2.

The Purist and Pragmatic strategies both work to promote the use of a single dominant language within the high-status formal domain of secondary education. In contrast, the Accommodating strategy enables more than one language to be used in secondary school and, potentially, to access further education or employment. In my analysis in Chapters 6 and 7 I discuss how these different language management strategies can be linked to different patterns of case characteristics. Overall, this process for describing MOI policies classified the MOI policies in my data in a consistent, transparent and replicable manner, which is a key criteria for using QCA effectively with qualitative data (de Block & Vis, 2017). The process allowed me to match the non-uniform descriptors of MOI policy from my data to a set of well-defined, crisp-set, outcome descriptors that could then be explored and interpreted in the light of the theoretical framework that shapes this study.

Using this two-stage "degree of choice" classification approach, some information about the relative status of additional languages (in comparison to the official language) can be deduced from the level in the education system where choice of MOI is allowed. However, it does not explicitly identify the different types of languages used as MOI and their relative statuses within the linguistic market. As a result, this typology does not do well at highlighting the introduction of the option of using additional *"international"* languages as MOI within an education system which already permits some degree of MOI choice, as is the case in the Czech Republic since 2008 (Eurydice, 2019b). Because of this, I decided to overlay a fourth MOI strategy grouping over my data, which I labelled "Opportunistic" and defined as:

- **Opportunistic.** A new, high status language (not typically considered to be present in the linguistic market) is introduced as an MOI.

In Chapter 8 I discuss how some countries have integrated this "Opportunistic" MOI strategy into their existing state-building MOI policies.

5.6 Summary of MOI policies

Table 5-5 in this section contains brief descriptions of the MOI policy changes made by the cases covered by this study and the dates when they occurred. Where applicable, it includes pre-independence policies which were still in effect after independence. To capture as much detail as possible about changes to how languages are used for teaching and learning in schools, this table includes information on laws, curriculum directives, pilot studies, and other state-approved changes to MOI policy. At the end of this document, in section 11, there is a country-by-country bibliography of the data sources which I consulted to compile this table.

Reading from left to right, the first column gives the name of the country with its date of independence. The second column is an identification code for each MOI policy change, consisting of the country code and the date of the policy. For example, IDN1989 = a policy made in Indonesia in 1989. Policies identified as being "opportunistic" are indicated with an asterisk (IDN1989*). The third column gives a brief description of the MOI strategy supported by the policy. The last two columns show the amount of MOI choice supported by the policy in primary (column four) and secondary (column five) school. The amount of choice was coded using the scales described in Tables 5-3 and 5-4.

State	Policy date	Brief policy description	primary choice	secondary choice
Indonesia (1945)	IDN1950	Bahasa Indonesia as dominant MOI. MT may be used as MOI for P1-3.	3	0
	IDN1989*	As before, plus foreign languages may be used as MOI "to aid understanding".	3	1
	IDN2003*	As before. Strengthening of use of foreign languages (predominantly English) as additional MOI in state-schools.	3	1

State	Policy date	Brief policy description	primary choice	secondary choice
Philippines (1946)	PHL1940	English as MOI for all grades. Spanish forbidden. Some use of vernacular condoned.	1	0
	PHL1957	Vernaculars as MOI in P1-2, English as MOI from P3 onwards. Tagalog as a subject from P2.	2	0
	PHL1974	Pilipino as MOI for all subjects apart from maths and science (where English remains MOI). No use of vernacular in P1-2.	0	0
	PHL1987	As before but some use of vernacular languages as initial language for literacy.	1	0
	PHL1999	Local lingua franca as MOI in P1 for all schools.	2	0
	PHL2009	Local language as MOI for P1-2. Transition to Filipino and English as MOI no earlier than P3.	3	0
	PHL2013	MT or regional language as MOI from kindergarten to P3. P4-6 gradual transition to Filipino and English MOI for rest of schooling.	3	0
New Zealand (1947)	NZL1947	Education Amendment Act: no statement on MOI, assumed to be all-English (Māori taught as a subject in Māori schools)	0	0
	NZL1964	Education Act: Māori children may attend non-Māori schools	0	0
	NZL1984	4 publicly funded Māori-English bilingual primary schools in operation	1	0
	NZL1989	Education Act: end of division between Māori and non-Māori schools. Commitment to teach Māori as a subject, but not to use it as an MOI But, Education Act formally recognises kura kaupapa Māori (Māori immersion schools) as educational institutions	4	1
	NZL1992	The Ministry of Education launches Te Marautanga o Aotearoa, a curriculum for Māori-medium education based on Māori philosophies	4	1
	NZL2007	Complementary English and Māori MOI curricula. Provision for language support for Pasifika students	4	2
	NZL2014	Curriculum: "English is the language for most learning". Māori language and NZ sign language can also be used as MOI	4	2
South Korea (1950)	KOR1949	Korean reinstated as sole MOI (having been banned as MOI under Japanese rule).	0	0
	KOR2008	Limited use of MT as MOI as strategy of last resort for assimilation into all-Korean MOI system.	1	0

State	Policy date	Brief policy description	primary choice	secondary choice
Ghana (1957)	GHA1957	English as dominant MOI. No other languages used.	0	0
	GHA1966	MT used as MOI in P1	2	0
	GHA1970	MT used as MOI for a least the first 3 years of primary school.	3	0
	GHA2002	All-English MOI.	0	0
	GHA2008	MT (11 national languages used as MOI) used as MOI for kindergarten and P1-3, transitioning to English National Literacy Acceleration Programme (NALAP) Implemented nationally 2009/10 academic year	3	0
Benin (1960)	BEN1947	French as sole MOI.	0	0
	BEN1975	Introduction of local languages as MOI in primary school and as subjects (not implemented).	1	0
	BEN2003	Introduction of local languages as MOI in primary school and as subjects (as of 2013, not yet implemented).	1	0
Burkina Faso (1960)	BFA1960	All French MOI	0	0
	BFA1978	Experimental bilingual primary schools	1	0
	BFA1983	All French MOI	0	0
	BFA1994	New experimental bilingual MOI programme for G1-3	1	0
	BFA1996	Education law makes provision for national (community) languages to be used as MOI in addition to French	1	0
	BFA2007	No change to MOI provision	1	0
Côte d'Ivoire (1960)	CIV1960	French as sole MOI.	0	0
	CIV2004	Possible to use local languages for teaching in pre-school and early primary education.	1	0
Gabon (1960)	GAB1966	French as sole MOI.	0	0
Senegal (1960)	SEN1960	French as sole MOI.	0	0
	SEN1978	Pilot projects using MT as MOI in P1-2.	1	0
	SEN2001	Pilot projects using MT as MOI in Kindergarten and P1-2 and trials of Franco-Arabic bilingual education in Islamic schools.	1	0
Togo (1960)	TGO1960	French as sole MOI.	0	0
	TGO1975	Education Reform: local languages introduced as subjects	0	0

State	Policy date	Brief policy description	primary choice	secondary choice
Cameroon (1961)	CMR1961	Federal system (federal MOI policy retained after becoming unitary state). MOI is either all-English or all-French depending on region (other official language taught as compulsory subject). Use of community languages as MOI actively discouraged. Some small scale trials of bilingual FR/EN teaching.	4	2
	CMR1978	Operational Research Project for Language Education in Cameroon (PROPELCA): non-government project to promote use of community languages as first MOI in primary school. Increasingly tolerated by government.	4	2
	CMR1998	Law No. 98/004 of 14 April 1998. Retention of parallel Anglophone and Francophone education systems. Provision for the teaching of community languages and increased promotion of (French/English) bilingualism.	4	2
Rwanda (1961)	RWA1962	French as dominant MOI. Kinyarwanda used as MOI for P1-3.	0	0
	RWA1977	Kinyarwanda used as MOI for P1-6	0	0
	RWA1996*	Trilingual MOI policy. Secondary schooling may be completed using either French or English as MOI. Kinyarwanda used as MOI for P1-3	0	2
	RWA2008	English as dominant MOI. Bilingual MOI policy. Secondary schooling is English MOI only.	0	0
	RWA2011	Kinyarwanda formally reintroduced as MOI for P1-3, English MOI for all other levels	0	0
Tanzania (1961)	TZA1964	English as dominant MOI. Asian vernaculars removed from primary education system. Where English is MOI for primary, Kiswahili is examinable subject from P3. Where Kiswahili is MOI, English is subject from P3 and MOI for P7&8.	3	0
	TZA1967	All primary education P1-8 is Kiswahili MOI. English as subject from P1 and MOI for secondary school.	0	0
	TZA2014	Education and Training Policy: Kiswahili will be used for teaching and learning at all levels of education and training. English retained as a compulsory subject.	0	0
Jamaica (1962)	JAM1960	All Standard Jamaican English (SJE) MOI by default	0	0
	JAM1965	Education Act. No specific mention of, or change to, MOI	0	0
	JAM2004	Bilingual Education Project. Small-scale project to explore and promote bilingual (SJE and Jamaican Creole) teaching and learning in primary schools (ended 2008)	1	0

State	Policy date	Brief policy description	primary choice	secondary choice
	JAM2006	Primary education reform. SJE and JC recognised and treated as two separate languages. SJE MOI with some use of JC	2	0
Trinidad & Tobago (1962)	TTO1966	Education Act: no mention of MOI, de facto all-English	0	0
	TTO1975	English as dominant MOI. Permission to use "Trinidadian Vernacular" to support learning if needed.	1	0
	TTO1999	As before, increased promotion of use of vernacular as supplementary MOI when needed.	2	0
Uganda (1962)	UGA1965	English as dominant MOI. Official regional language as MOI in P1-4, transitioning to English. English as MOI from P1 in urban/mixed areas.	3	0
	UGA1975	Local curriculum introduced – no change to MOI	3	0
	UGA1989	Education Review Commission: recommendation that MT be MOI for P1-4, with English taught as a subject.	3	0
	UGA1992	Government White Paper "Education for National Development and Integration". Local languages as MOI from P1-3, P4 as transition year, English as MOI from P5 onwards.	3	0
	UGA2000	New primary curriculum. No change to MOI policy but little effective support for implementation	3	0
	UGA2007	Thematic Curriculum: local languages (or English if the dominant community language is unclear) as MOI G1-3, English as MOI for all other grades.	3	0
Kenya (1963)	KEN1964	Ominde Report. English as dominant MOI. Education Commission recommendation to transition to all-English MOI as soon as practicable (never fully implemented). Kiswahili as compulsory subject from P1.	1	0
	KEN1967	Unified Primary School Syllabus: two versions, one for English medium streams and one for non-English medium streams	2	0
	KEN1975	Gachathi Report. Pupils be taught in predominate language of catchment area for first 3 years. English as subject from P1 & MOI from P4. Kiswahili as subject when English becomes MOI.	3	0

State	Policy date	Brief policy description	primary choice	secondary choice
	KEN1984	Introduction of 8-4-4 system, "vernacular of area" as MOI for P1-4, then English as MOI for all further levels.	3	0
	KEN2002	Curriculum review, no change to MOI	3	0
	KEN2013	Basic Education Act: right to lower primary education in "language of choice", where "reasonably practicable"	3	0
Zambia (1964)	ZMB1966	All-English MOI from P1 - following recommendation from UNESCO.	0	0
	ZMB1977	All-English MOI remains but official Zambian languages may be used in class to aid understanding.	1	0
	ZMB1992	Official Zambian languages to be used as MOI from P1-4 (not implemented).	3	0
	ZMB1996	Official MOI policy remains all-English. P1 reading skills to be taught through 7 official languages, English literacy introduced in P2.	2	0
	ZMB2000	Official MOI policy remains all-English. P1 literacy "taught in a familiar language". Literacy in official Zambian language continues to be developed in P1-7. From P2 literacy taught in English.	2	0
	ZMB2011	"vernacular language or languages appropriate to the area" may be used as MOI in P1-4.	3	0
	ZMB2013	Local languages or MT as MOI in P1. Official Zambian language as MOI in P2-3. P4 as transition year to English MOI. P5-7 onwards English as MOI.	3	0
Gambia (1965)	GMB1965	English is dominant MOI. Early exit MT MOI policy for early primary education.	2	0
	GMB1988	Pilot schemes to support implementation of MT MOI in early primary	2	0
	GMB2004	National Education Policy (2004-2015) L1 or area languages as MOI in G1-3, then English (not implemented)	3	0
	GMB2010	New Curriculum Framework for Basic Education: G1-4: national language as MOI, English as MOI for all other grades	3	0
Singapore (1965)	SGP1957	1956 All Party Report on Chinese Education. All four official languages streams (English, Mandarin Chinese, Tamil, Malay) have equal status as MOI in state education system.	4	2
	SGP1979	Special Assistance Plan schools - extra funding for some schools to offer élite bilingual English / Mandarin MOI schooling	4	2

State	Policy date	Brief policy description	primary choice	secondary choice
	SGP1984	All schools to use English MOI for non-L2 subjects from 1987. SAP schools remain (non-language subjects taught in English).	0	0
Botswana (1966)	BWA1966	Officially all English MOI but no written policy. Accepted that Setswana continued to be MOI in first few years of primary (other local languages banned).	1	0
	BWA1977	National Policy on Education. Setswana as MOI for P1-4, then English as MOI from P5. English as subject from P1.	0	0
	BWA1994	Setswana as MOI for P1 with English as subject. From P2, English as MOI & Setswana as subject.	0	0
	BWA1997	Revised National Policy on Education. Other languages allowed to be used in schools for teaching and learning in pre-school & P1-2 - no central administration of policy.	1	0
	BWA2015	Education and Training Sector Strategic Plan: Setswana as MOI G1-4, English as MOI from G5 onwards.(Report acknowledges that MT policy has not yet been adequately addressed).	1	0
Lesotho (1966)	LSO1966	seSotho MOI in G1-4, all other grades in primary and secondary school use English MOI	0	0
	LSO1995	Education act: no change to MOI	0	0
	LSO1997	Primary school syllabus, seSotho MOI in G1-3, all other grades use English MOI	0	0
	LSO2005	Education Sector Strategic Plan: move to produce preschool and basic education activity resources in MT (not just seSotho)	1	0
	LSO2008	Curriculum and Assessment Policy: "resources permitting" MT (not just seSotho) to be used as MOI in G1-3, then transitioning to all-English MOI	3	0
Equatorial Guinea (1968)	GNQ1968	All Spanish MOI	0	0
	GNQ1981	General Law of Education. Spanish as sole MOI. African linguistic and cultural heritage to be valued.	0	0
	GNQ1982	Experimental use of national languages as MOI in primary school (also taught as subjects in primary school)	1	0
	GNQ1988	Spanish as sole MOI	0	0
	GNQ2007	Education Law. Spanish as sole MOI. National languages may be learnt as subjects in secondary school	0	0
Mauritius MUS (1968)	MUS1957	English as dominant MOI. French as compulsory subject. Some possibility to use other languages as MOI in P1-3.	1	0

State	Policy date	Brief policy description	primary choice	secondary choice
	MUS2006	English remains dominant MOI. Formal promotion of use of "language of the environment" as MOI to aid learning at any stage.	2	0
Croatia (1990)	HRV1991	Croatian in Latin script is official language and dominant MOI. Minority languages and scripts may be used as MOI. 2008 Law on Education in Primary and Secondary Schools: no change to MOI	4	2
Namibia (1990)	NAM1990	English introduced in junior secondary as MOI (replacing Afrikaans). "Home language" as MOI in lower primary.	3	0
	NAM1993	"Towards Education for All": "the home language, a local language, or English will be the MOI in G1-3" – transitioning to English MOI from G4 onwards. "Non-promotional subjects in G4-7 may be taught in a national language other than English" [clarification over phasing out of Afrikaans & phasing in of English]	3	0
	NAM2001	Education Act: no change to MOI policy [no change with 2016 review either]	3	0
	NAM2003	The Language Policy for Schools in Namibia (discussion document): restatement of the use of community language as MOI for G1-3	3	0
Belarus (1991)	BLR1991	Right to choose between Belarusian or Russian MOI education. Minority language MOI also available.	4	2
	BLR2005	Parents have the right to choose the MOI for their child in primary and secondary school.	4	2
	BLR2006	Belarusian history in years 9 and 10 to be taught in Russian.	4	1
Estonia (1991)	EST1992	Estonian as dominant MOI. Minority MOI education is allowed. All must learn Estonian. All Russian MOI upper secondary education to transition to Estonian MOI by 2000.	4	2
	EST1998	Postponement and softening of cut to Russian MOI upper secondary school – requirement for 60:40 Estonian/Russian MOI. Russian MOI education funded in perpetuity.	4	2
	EST2004	Creation of separate Estonian language immersion classes for speakers of Estonian as L2.	4	2
	EST2007	Russian MOI Upper Secondary to transition to 60% Estonian MOI by 2011	4	1
Kazakhstan (1991)	KAZ1992	Limited promotion of Kazakh as dominant MOI. Russian MOI remains dominant, other MOIs permitted.	4	2
	KAZ2010*	Promotion of "trinity of languages" with multilingual Kazakh/Russian/English MOI strategy.	4	2

State	Policy date	Brief policy description	primary choice	secondary choice
Kyrgyzstan (1991)	KGZ1992	Increased support on paper for Kyrgyz as dominant MOI. Russian MOI remains dominant, other MOIs permitted. Kyrgyz and Russian as mandatory subjects.	4	2
Latvia (1991)	LVA1991	Latvian as dominant MOI. Right to minority MOI schooling reintroduced. Russian MOI schooling continues as separate system. Learning Latvian compulsory for all.	4	2
	LVA1995	Some bilingual (minority-Latvian) MOI schooling introduced in basic education. Latvian MOI schooling reserved for Latvian-speakers	3	2
	LVA1998	All Russian MOI basic schools to become bilingual (Latvian-Russian) schools by 2008.	3	2
	LVA2004	All minority (Russian) MOI upper secondary schools to become bilingual schools using 60:40 Latvian/minority MOI.	3	1
Lithuania (1991)	LTU1991	Lithuanian as dominant MOI. Right to minority MOI reinstated. Polish and Russian continue to be used as MOI. All to learn Lithuanian language & literature.	4	2
	LTU2001*	Non-compulsory bilingual (Lithuanian/minority language) education project for minority MOI schools. All children have a right to Lithuanian MOI education. Pilot CLIL-style Lithuanian + Foreign MOI bilingual schooling	4	2
North Macedonia (1991)	MKD1991	Primary and secondary education available through Macedonian, Albanian, Turkish or Serbian. With Macedonian as a subject from P3 if not MOI. Standardised curriculum for all.	4	2
Slovenia (1991)	SVN1991	Slovene is the sole MOI, except in municipalities where Italian or Hungarian (autochthonous) communities reside – in these the co-official language is MOI with Slovene as additional MOI or subject.	4	2
Tajikistan (1991)	TJK1989	Increased support of Tajik as dominant MOI. Compulsory study of Tajik and Russian for all as subjects. Other MOIs also permitted.	4	2
	TJK1997	Increased promotion of use of Tajik as MOI for sciences for all students in secondary and tertiary education. Revised Cyrillic alphabet introduced.	4	1
Turkmenistan (1991)	TKM1990	Law on Languages: Turkmen is the state language, all citizens will be guaranteed the right to use their mother tongue	4	2
	TKM1993	Russian effectively removed as MOI but taught as subject. Turkmen will become the main language of secondary and higher education from 1998	4	1

State	Policy date	Brief policy description	primary choice	secondary choice
	TKM2003	All non-Turkmen MOI schools (Russian & minority languages) officially converted to Turkmen MOI schools. Russian taught as a subject.	0	0
	TKM2009	Law on Education: no change to MOI	0	0
Ukraine (1991)	UKR1991	Ukrainian as dominant MOI. Other languages permitted to be used as MOI. Russian MOI schools that were previously Ukrainian MOI to convert back to Ukrainian MOI on a grade-by-grade basis - but no change to right to choose MOI.	4	2
	UKR2017	After P4 (post-primary) all minority MOI schools (including Russian) are to become bilingual Ukrainian/minority MOI schools.	4	1
Czech Republic (1993)	CZE1992	Czech as dominant MOI. Right to state supported minority MOI schooling continues.	4	2
	CZE2008*	Pilot of mainstream (basic) bilingual schools using "Czech plus foreign language" MOI (some in existence since 1995).	4	2
Eritrea (1993)	ERI1991	English as dominant MOI. MTs or "language of choice of community" as MOI in P1-5, then English.	3	0
	ERI2003	Curriculum review: reinforcement of existing MOI policy (restricting use of Arabic as MOI when it is not MT)	3	0
	ERI2010	National Education Policy: no change to MOI policy, home languages to be taught as a subject in middle school)	3	0
Slovakia (1993)	SVK1993	Slovak as dominant MOI. Right to minority MOI education reconfirmed.	4	2
	SVK1995	Renewed promotion of the "Alternative Education" model of bilingual (Slovak plus minority language) MOI education for minority groups.	4	1
	SVK2001*	Pilots of CLIL-type MOI: Slovak + (Spanish, German, English, French)	4	1
Timor Leste (2002)	TLS2000	Portuguese as dominant MOI, replacing bahasa Indonesia.	0	0
	TLS2004	Some use of Tetum as MOI in early primary.	0	0
	TLS2008	Basic Education Act: Tetum as MOI in P1-3, with increasing use of Portuguese, then Portuguese a sole MOI from P4 onwards.	0	0
	TLS2011	Strategic Development Plan: Local languages may be used as MOI in early primary, plus increased role for Tetum as MOI.	2	0

Table 5-5 Table of MOI policy choices. Cases are ordered by date of independence.

5.7 MOI policy trajectories

To compare how MOI policies change over time I used the calibrated case data to generate a longitudinal data set, comparing MOI policies at 10-year intervals from 1965 to 2015. Table 5-6 below, summarises the MOI policy trajectories of all cases from 1965 to 2015. Each row represents one country and the pair of numbers in each cell represents the amount of MOI choice supported in primary and secondary schools – coded according to the scales in Tables 5-3 and 5-4. For example, 4,2 means primary school MOI choice = 4, secondary school MOI choice = 2. Policies coded as also being "opportunistic" are indicated by an asterisk *. A slash / indicates that a case has not yet become independent.

The table shows that there is a lot of movement between the purist and pragmatic categories. Both of these MOI types allow no choice of MOI in secondary school (secondary choice = 0) but differ in the amount of MOI choice supported in primary schools. In the purist type, little or no choice is allowed (primary choice = 0 or 1) but MOI choice is supported in the pragmatic type (primary choice = 2, 3 or 4). In chapter six I discuss this movement between purist and pragmatic strategies.

There is very little movement, however between either the purist or the pragmatic type and the accommodating type – where MOI choice is supported in secondary school (secondary choice = 1 or 2). I discuss the maintenance and restriction of accommodating MOI policies in chapter seven. In chapter eight I discuss the adoption of opportunistic MOI policies, where new high-status languages are introduced as MOI.

Case	1965	1975	1985	1995	2005	2015
IDN	3,0	3,0	3,0	3,1*	3,1*	3,1*
PHL	2,0	0,0	0,0	1,0	2,0	3,0
NZL	0,0	0,0	1,0	4,1	4,1	4,2
KOR	0,0	0,0	0,0	0,0	0,0	1,0
GHA	0,0	3,0	3,0	3,0	0,0	3,0
BEN	0,0	1,0	1,0	1,0	1,0	1,0
BFA	0,0	0,0	0,0	1,0	1,0	1,0
CIV	0,0	0,0	0,0	0,0	1,0	1,0
GAB	0,0	0,0	0,0	0,0	0,0	0,0
SEN	0,0	0,0	1,0	1,0	1,0	1,0
TGO	0,0	0,0	0,0	0,0	0,0	0,0
CMR	4,2	4,2	4,2	4,2	4,2	4,2
RWA	0,0	0,0	0,0	0,0	0,2*	0,0
TZA	3,0	0,0	0,0	0,0	0,0	0,0
JAM	0,0	0,0	0,0	0,0	1,0	2,0
TTO	0,0	1,0	1,0	1,0	2,0	2,0
UGA	3,0	3,0	3,0	3,0	3,0	3,0
KEN	1,0	3,0	3,0	3,0	3,0	3,0
ZMB	0,0	0,0	1,0	3,0	2,0	3,0
GMB	2,0	2,0	2,0	2,0	3,0	3,0
SGP	4,2	4,2	0,0	0,0	0,0	0,0
BWA	/	1,0	0,0	0,0	1,0	1,0
LSO	/	0,0	0,0	0,0	1,0	3,0
GNQ	/	0,0	1,0	0,0	0,0	0,0
MUS	/	1,0	1,0	1,0	1,0	2,0
HRV	/	/	/	4,2	4,2	4,2
NAM	/	/	/	3,0	3,0	3,0
BLR	/	/	/	4,2	4,2	4,1
EST	/	/	/	4,2	4,2	4,1
KAZ	/	/	/	4,2	4,2	4,2*
KGZ	/	/	/	4,2	4,2	4,2
LVA	/	/	/	3,2	3,1	3,1
LTU	/	/	/	4,2	4,2*	4,2*
MKD	/	/	/	4,2	4,2	4,2
SVN	/	/	/	4,2	4,2	4,2
TJK	/	/	/	4,2	4,1	4,1
TKM	/	/	/	4,1	0,0	0,0
UKR	/	/	/	4,2	4,2	4,2
CZE	/	/	/	4,2	4,2	4,2*
ERI	/	/	/	3,0	3,0	3,0
SVK	/	/	/	4,2*	4,1*	4,1*
TLS	/	/	/	/	0,0	2,0

Table 5-6 MOI policy trajectories for all cases

5.8 Conclusion

In this chapter I described how I developed a strategy to enable me to answer my first research question *"What strategies of MOI policy have been adopted by the governments of new states across primary and secondary schooling and how have these changed over time?"* To facilitate the interpretation of MOI policy choice in terms of supporting the maintenance and development of a state's linguistic market, I developed a set of four novel MOI policy descriptors which describe a country's overall MOI policy according to the amount of language choice which is supported. These are:

- **Purist.** Only the official state language(s) are used as MOI throughout primary and secondary education. There is no (or very little) MOI choice allowed or supported. Primary choice = 0 or 1; secondary choice = 0.
- **Pragmatic.** Community languages are used as MOI in primary schooling but only the official language(s) are used as MOI in secondary school. Primary choice = 2, 3, or 4; Secondary choice = 0.
- **Accommodating.** Community languages (which often have a relatively high status within the international linguistic market) are used as MOI within both primary and secondary school. Or there is some choice in the MOI used for secondary schooling. Primary choice = 0, 1, 2, 3 or 4; Secondary choice = 1 or 2.
- **Opportunistic.** A new, high status language (not typically considered to be present in the linguistic market) is introduced as an MOI.

To compare how MOI policies change over time, I collected data on MOI policy choice for each country and compared them at six ten-year intervals, from 1965 to 2015. To answer the second research question, *"Can the patterns identified be explained using the concept of national and international linguistic markets?"* I collected demographic, political and economic data for these cases and analysed it using QCA truth-tables, for each of the MOI policy types. The data frames which I used to construct these truth-tables are included at the back of this document. In the next three chapters I discuss the relationships between case characteristics and changing MOI policy types which I found for the Purist and Pragmatic (Chapter 6), Accommodating (Chapter 7) and Opportunistic (Chapter 8) policy types.

6 The Purist and Pragmatic strategies: an elaboration

In this chapter I compare patterns of MOI policy shift in cases which do not allow any choice of language of instruction in secondary school. These countries use their MOI policies to support the use of only the official language(s) in formal domains. I identified two strategies for achieving this:

- **Purist.** Only the official state language(s) are used as MOI throughout primary and secondary education. There is no (or very little) MOI choice allowed or supported.
- **Pragmatic.** Community languages are used as MOI in primary schooling but only the official language(s) are used as MOI in secondary school.

In the first part of the chapter I discuss how I developed my analytical strategy for using QCA to investigate movement between the Purist and Pragmatic policy types and show the output, in the form of truth-tables and Boolean solutions of this longitudinal analysis.

I identified four significant ways in which these Purist and Pragmatic MOI strategies are altered to support linguistic state building: a "softening" of traditionally Purist MOI policies; Purist strategies which use "dual language" MOIs – teaching using both a national and an international language; debates over whether Pragmatic MOI policies "help or hinder" the acquisition of international languages; and states which experienced "violent transitions" to independence using their MOI policies to create a new national linguistic identity. In the second part of this chapter I discuss how these strategies have a common goal of using primary school MOI to promote the acquisition of a country's official language(s) and thus maintain its position as the dominant language within the country's linguistic market.

6.1 Case Data

Table 6-1 below summarises the amount of primary school MOI choice in all of the cases which have used either a Purist or a Pragmatic MOI policy at some point over the period of time covered by this study. During my research I was struck by how often MOI traditions established before independence were maintained and reproduced by post-independence education systems. In this chapter I have used the concepts of linguistic state-building and the influence of internationally-promoted models of educational best-practice to explore why independent countries might change the MOI policies of their state school systems.

In Table 6-1 cases are ordered according to the amount of MOI choice supported in primary school. At the top are Singapore and Turkmenistan – countries which have moved from having Accommodating MOI policies (allowing choice of MOI in both primary and secondary school) to having strict Purist MOI policies. At the bottom is New Zealand, which moved in the opposite direction, from a Purist to an Accommodating MOI strategy. Two other cases, Rwanda and Indonesia, have introduced some choice of language of instruction in secondary school. I discuss these outlier cases in Chapters 7 and 8 which deal with countries that allow MOI choice in secondary school.

Key to Table 6-1

NAME: Country name (in 2015) and country code

INDEP: date of independence

P_MAX: maximum amount of primary MOI language choice before independence

VIL_I: there was a violent transition to independence

MOI_CH: at independence there was a change of dominant MOI

ling_frac: index of linguistic fractionalization

LITI: national adult literacy rate at independence

Primary School MOI Choice: primary school MOI policies are coded using the primary choice scale (described in Chapter 5), where 0 represents no choice of MOI and 4 indicates that a full course of primary school is available through more than one language. The presence of a dual MOI policy. is indicated by the symbol *. The presence of MOI choice in secondary school is indicated by the symbol ^. "n/a" indicates that the country was not yet independent.

CASE NAME	INDEP	P_MAX	VIL_I	MOI_CH	ling_frac	LITI (%)	Primary School MOI Choice					
							1965	1975	1985	1995	2005	2015
Singapore SGP	1965	4^	0	1	0.773	62	4^	4^	0	0	0	0
Turkmenistan TKM	1991	4^	0	1	0.457	98	n/a	n/a	n/a	4	0	0
Togo TGO	1960	0	0	0	0.905	10	0	0	0	0	0	0
Equatorial Guinea GNQ	1968	0	0	0	0.284	45	n/a	0	1	0	0	0
Gabon GAB	1960	0	0	0	0.846	12	0	0	0	0	0	0
South Korea KOR	1950	0	1	1	0.008	38	0	0	0	0	0	1
Senegal SEN	1960	0	0	0	0.778	6	0	0	1	1	1	1
Rwanda RWA	1961	0	1	0	0.09	17	0*	0*	0*	0*	0*^	0*
Tanzania TZA	1961	3	0	0	0.88	13	3	0*	0*	0*	0*	0
Benin BEN	1960	0	0	0	0.924	4	0	1	1	1	1	1
Botswana BWA	1966	2	0	0	0.397	35	n/a	1	0*	0*	1	1*
Burkina Faso BFA	1960	0	0	0	0.721	3	0	0	0	1	1	1
Côte D'Ivoire CIV	1960	0	0	0	0.902	5	0	0	0	0	1	1
Timor Leste TLS	2002	2	1	1	0.819	40	n/a	n/a	n/a	n/a	0	2*
Jamaica JAM	1962	0	0	0	0.017	83	0	0	0	0	1	2
Mauritius MUS	1968	3	0	0	0.216	64	n/a	1	1	1	1	2
Trinidad and Tobago TTO	1962	1	0	0	0.597	93	0	1	1	1	2	2
Lesotho LSO	1966	0	0	0	0.091	59	n/a	0*	0*	0*	1*	3
Philippines PHL	1946	1	0	0	0.849	59	2	0*	0*	1*	2*	3*
Zambia ZMB	1964	3	0	0	0.828	44	0	0	1	3	2	3
Gambia GMB	1965	3	0	0	0.776	16	2	2	2	3	3	3
Ghana GHA	1957	3	0	0	0.858	26	0	3	3	3	0	3
Uganda UGA	1962	3	0	0	0.93	36	3	3	3	3	3	3
Kenya KEN	1963	3	1	0	0.927	26	1	3	3	3	3	3
Indonesia IDN	1945	3	1	1	0.816	7	3	3	3	3^	3^	3^
Namibia NAM	1990	3	1	1	0.789	75	n/a	n/a	n/a	3	3	3
Eritrea ERI	1993	4	1	0	0.65	34	n/a	n/a	n/a	3	3	3
New Zealand NZL	1947	2	0	0	0.291	99	0	0	1	4^	4^	4^

Table 6-1 Overview of all cases which have ever used Purist or Pragmatic MOI policies

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6.2 Developing the longitudinal analysis strategy: case characteristics

In this section I introduce the case characteristics which I used to construct the truth-tables I used for my longitudinal analysis. The focus of this analysis is on **how** states use MOI policies to support linguistic state building and the case characteristics have been designed to support a discussion of how context influences the choice of MOI policy used to support the acquisition and use of an official language by students.

6.2.1 Influence of pre-independence MOI traditions

When exploring the case data I was struck by how often MOI traditions established before independence were maintained and reproduced by post-independence education systems. I coded the degree of MOI choice allowed before independence in the same way as I coded post-independence choice to create the following characteristics:

- **HPUR**: in the Twentieth Century, the pre-independence administration did not support MOI choice in primary schools
- **HPRA:** in the Twentieth Century, the pre-independence administration allowed some choice of MOI in primary schools, but not in secondary schools

Including these characteristics in truth-tables enabled me to identify and track cases which made changes to their inherited MOI traditions.

6.2.2 Official languages and the linguistic market

I designed the "degree of choice" MOI outcome types for this study to be interpreted using case characteristics that represent the relative position within the national and international linguistic markets of the languages used as MOI in schools. Making the assumption that the MOI policy of a state-school system will support the formal state linguistic identity (Price, 1973, p. 1). I defined characteristics to represent the status of the dominant MOI (and, by association, the language-of-state) in relation to the international linguistic market; and to capture MOI policies which seek to promote the use of more than one language with official status. Such "dual MOI" policies often involve the use of a language with relatively low status within the international linguistic market, which may have implications for the willingness of policy makers to allow the use other lower status languages for teaching and learning.

- **INTL_MOI:** the dominant MOI is an international language (privileged with formal status in a different state and also commonly used as a regional lingua franca)
- **DUAL_MOI:** a national language, other than the dominant MOI is used as a compulsory MOI at some stage (or for some subjects) by the majority of students

The addition of the phrase "commonly used as a lingua franca" to the definition of "international MOI" was to exclude languages such as Korean and bahasa Indonesia (Malay) which, whilst having a high status within the national linguistic market of more than one country (due to a combination of symbolic power and proven economic utility), have a lower functional status within the international linguistic market as their economic utility is strongly tied to a particular region or country (Bourdieu, 1992b, p. 170). For this study, I considered Russian, French, Spanish, Portuguese, Arabic, Chinese (Mandarin) and English to be international languages.

6.2.3 Literacy levels and language use

The promotion of standardised formal linguistic identities by states is linked to the spread of shared literacy practices within the population and can be developed by the provision of state-school systems (Anderson, 1991). Research on historical levels of access to education often relies upon reported rates of literacy within a population as a proxy for basic educational attainment. Adult literacy rates are commonly used as an indicator of the reach and effectiveness of an education system in the recent past (OECD, 2014, pp. 87–93). From WW2 onwards UNESCO has produced comparative surveys of world literacy rates (UNESCO, 1953a, pp. 13–32). The quality of comparative work using this data depends, ultimately, upon the quality of the data collected and shared by the governments of participating states (Taylor-Leech, 2009). For consistency, I have used UNESCO data on adult (age 15+) literacy rates, supplementing it with additional sources where needed. Sources accessed include (Curtis, 1992; Hicks & Boroumand, 1980; OECD, n.d.; UNESCO, 1953a, 1957, 1972, 1988, 1995; United Nations Statistical Division, 2021). I used simple linear interpolations of available data to estimate literacy rates for years where there was no data. The column LITI in Table 6-1 shows the literacy rate at independence of all of the Purist-Pragmatic cases. Many had low literacy rates when compared to the world

average literacy rate at the time that they became independent. I created the characteristic LITCUR to separate countries with very low literacy rates (when compared to the world average for that time) from those with mid- or high literacy rates.

- **LITCUR** = 1 if country's literacy rate > world average literacy rate x 0.8 (thresholds: 1965=40%, 1975=49%, 1985=53%, 1995=61%, 2005=66%, 2015=69%)

I included the indicator LITCUR in truth-tables to explore whether, particularly after 1990, countries with low literacy rates (LITCUR=0) make changes to their MOI policies.

I used national literacy rates not only to make inferences about levels of school attendance, but also about how strongly established patterns of language status are within the national linguistic market. Though only a small proportion of the population needs to be literate in the official language for it to be established as the dominant language, if a literate proportion is very small, it may be easier for a government to change its official language policy, as fewer people would have a vested interest in maintaining the pre-independence linguistic market. This issue is particularly relevant for states which have chosen an official language which is different to the dominant language of the colonial era.

Literacy rates give no indication of how many languages play a significant role within a country's linguistic market. Linguistic fractionalization is a measure commonly used to represent the overall level of linguistic diversity within a community – it is the probability that any two people, selected from a population at random, will speak different languages. Linguistic fractionalization takes values ranging from 0 (everybody speaks the same language) to 1 (everybody speaks a different language). For this study I have used the linguistic fractionalization values given in the 2018 edition of *Ethnologue: Languages of the World* (Simons & Fennig, 2018).

As with literacy rates, measures of linguistic fractionalization are only as reliable as the data sources which they are calculated from. Due to the impracticality of independently collecting language-use data, researchers who compile widely cited tables of comparative fractionalization values are reliant upon data from sources such as the *Encyclopaedia Britannica* and the *CIA World Factbook*

which, in turn, are compiled from infrequently updated and un-standardised measures of language usage, such as census data released by individual states and small-scale surveys (Alesina et al., 2003; Fearon, 2003). Consequently, whilst values of linguistic fractionalization (and other comparative language demographics) can change over time, they are often regarded by researchers as being stable for the purpose of longitudinal cross-country analysis (Alesina et al., 2003, p. 161). For the most part this assumption of "no change" is acceptable, however, where I was aware that the value of any case characteristic that I have treated as "fixed" changed significantly over the course of the state's independent history I took this into account in my analysis. Linguistic fractionalization gives a useful but limited picture of a state's linguistic market. It does not capture patterns of language distribution, or take into account the reality that many people are bilingual or multilingual. Consequently, I did not use linguistic fractionalization as a truth-table characteristic but I did draw on it to inform my interpretation of patterns within the truth-tables.

6.2.4 Post-independence influences: government and wealth

In my case selection process I eliminated states which are currently highly unstable and those which, on paper at least, are not participatory democracies. This still left me with a range of states both in terms of their current political and diplomatic status and their histories of governance and conflict. I include a summary of post-independent political and diplomatic events I considered as potentially significant in the appendix and drew on them, where necessary, in my analysis (Economist Intelligence Unit, 2020; Freedom House, 2021; The Fund for Peace, 2017).

Within the academic literature links have been made between the increased use of language-in-education policies as tools to develop a shared sense of linguistic national identity and the presence of external threats to a country's integrity (Darden & Mylonas, 2016). Links have also been made between the presence of authoritarian regimes in African states and the successful introduction of the use of non-European languages as national languages (A. Mazrui, 1996, pp. 107–109). In contrast, rapid regime changes (whether due to authoritarian coup or democratic election) have been associated with ineffective or trivial MOI policy

initiatives which do not significantly alter patterns of language status within the national linguistic market (Bamgbose, 2000).

I wanted to include consideration of the potential influence of the changing political environment in my analysis, using characteristics that encompassed both present circumstances and the lingering influence of past events. After testing the utility of various characteristic definitions, including ones to represent the potentially lasting influence of past periods of democracy or conflict, I included the characteristic CDEM, a measure of current civil and political freedoms in the truth-tables.

- **CDEM** = 1 when the country's administration is classified as "free" or "partly free"

I chose a fairly low cut-off point for countries to be included in the set of "democracies" as I wanted to highlight the impact that authoritarian regimes may have on MOI policy choice and change.

Writing on the economics of languages, Grin suggests that governments may consider potential economic returns when making language policy choices for their school systems (Grin, 2003). This type of reasoning influences the World Bank's recommendations on MOI strategies so it may be that poorer states, which are more dependent upon international aid for education, may also be influenced by this reasoning (Coleman, 2017; Taylor-Leech & Benson, 2017). Table 12-3 (appendix) shows when each state, if ever, first developed an education project in conjunction with the World Bank or through the GPE funding initiative. The World Bank has grouped countries into income bands based on their per capita income for operational purposes since 1978. I used these income bands to calibrate data on per capita income for each wave of analysis (Morawetz, 1977; The World Bank, 1978; World Bank, 2018a) and used the characteristic, POOR, to represent very low income countries in my analysis:

- **POOR** = 1 if the country is categorized by the World Bank as being a low-income country. In 2015, these were countries which had a per capita income of less than 1,045 USD per year. For earlier waves (1965,

1975) I used descriptions in World Bank country assessments to identify poor countries.

6.3 Longitudinal analysis of Purist – Pragmatic MOI policy shift using truth-tables

I analysed my MOI policy data longitudinally, comparing cases in 1965, 1975, 1985, 1995, 2005 and 2015. The truth-tables presented in this section are the result of an iterative process of reading cases data, developing cases characteristics, and constructing and analysing truth-tables. They are constructed from the characteristics which I found made the most insightful comparisons between the Purist and Pragmatic cases across all of the waves of analysis. Despite the often enduring nature of the influence of pre-independence MOI policies, I did not find any formally necessary or near-necessary conditions for either the Purist or the Pragmatic policy types as there is movement between the two policy types. I used the same characteristics (re-calibrated for each wave of data) for each truth-table so that data patterns are readily comparable across waves.

6.4 Reading the truth-tables

Each truth-table follows the same format and has ten columns. From left to right, the columns contain the following information:

Column 1: **row number (#).** In each sequence of analysis (Purist and Pragmatic) rows with the same row number represent the same combination of case characteristics (empty rows were excluded).

Columns 2-7: **case characteristics.** Each truth-table was constructed from six case characteristics, which gives a total of 64 possible combinations of case characteristics. In each case characteristic column, 1 represents the presence of the characteristic and 0 its absence. I use HPUR as the first characteristic for the Purist series and HPRA for the Pragmatic series. The other five characteristics are identical for both series.

Column 8: **OUT.** This is the output column. When it contains a 1 this indicates that the row has been coded as sufficient for the outcome of interest.

Column 9: **incl**. This column shows the consistency of each row (number of positive cases in row ÷ total number of cases in row). If all the cases in the row are positive (show the outcome of interest) then row consistency = 1. Cases which have a row consistency above 0.8 have been coded as sufficient for the outcome (OUT=1).

Column 10: **cases.** This column shows all of the cases which have the combination of cases characteristics that the row represents. Positive cases are in **BOLD UPPERCASE** and negative cases are in lowercase.

Under each truth-table I give the overall solution consistency and coverage for all of the rows coded as OUT=1. I include Boolean solutions when the solution coverage is high enough to warrant this. I use parsimonious solutions with the Purist truth-tables and conservative solutions with the Pragmatic ones as this combination was most useful for supporting interpretation. In the Boolean solutions the absence of a characteristic is represented by a tilde ~ before the characteristic name. A case may be covered by more than one term in the Boolean solution. I also give brief notes about patterns of case characteristics within the solution and about any cases excluded from the solution. I elaborate on these notes later in the chapter.

6.5 Longitudinal analysis of membership to the "Purist" MOI policy type

6.5.1 1965: Purist

#	HPUR	INTL_MOI	LITCUR	CDEM	POOR	DUAL_MOI	OUT	incl	cases
11	0	0	1	0	1	0	0	0	idn
17	0	1	0	0	0	0	0	0	cmr
19	0	1	0	0	1	0	0	0.333	**GHA,**uga,tza
23	0	1	0	1	1	0	0	0.5	gmb,**KEN**
29	0	1	1	1	0	0	0	0.5	**NZL,**sgp
31	0	1	1	1	1	0	**1**	1	**ZMB**
41	1	0	1	0	0	0	**1**	1	**KOR**
49	1	1	0	0	0	0	**1**	1	**CIV,GAB**
51	1	1	0	0	1	0	**1**	1	**BEN,TGO**
52	1	1	0	0	1	1	**1**	1	**RWA**
53	1	1	0	1	0	0	**1**	1	**SEN**
55	1	1	0	1	1	0	**1**	1	**BFA**
57	1	1	1	0	0	0	0	0	phl
61	1	1	1	1	0	0	**1**	1	**JAM,TTO**

Table 6-2 Truth-table for membership to Purist set in 1965.

1965: parsimonious Boolean solution for membership to Purist set

Solution consistency=1.00, solution coverage=0.786 (11/14 positive cases)

solution terms	cases covered by solution terms
HPUR*~LITCUR +	CIV,GAB; BEN,TGO; RWA; SEN; BFA
HPUR*CDEM +	SEN; BFA; JAM,TTO
HPUR*~INTL_MOI +	KOR
INTL_MOI*LITCUR*POOR -> PUR	ZMB

In 1965, which is soon after independence for the majority of cases, the tendency for countries to continue using MOI policies established during the pre-independence era is indicated by the presence of HPUR (the pre independence MOI policy did not allow any MOI choice) in all but one of the solution terms. The only exception to this is Zambia (ZMB), which was a British colony. The Purist cases excluded from the Boolean solution are Ghana (row #19), Kenya (row #23), and New Zealand (row #29) were also colonised by the British. Throughout this longitudinal analysis Zambia, Ghana and Kenya are regularly found in

inconsistent rows as their case characteristics change (particularly membership to LITCUR and CDEM) and they move between using Purist and Pragmatic MOI strategies. This inconsistency in the truth-table rows highlights the fact that neither MOI patterns established before independence, nor the global promotion of particular models of MOI best-practice dictate the MOI policy choices of post-independence governments. The case of Zambia illustrates this. Zambia's 1966 Education Act, which made English the sole MOI for all levels of schooling was based on the recommendations of a 1963 UNESCO-sponsored report. The report concluded that, for linguistically diverse Zambia, the use of community or regional languages as MOI was both impractical and a potential threat to national unity. In addition, reflecting the enduring meme that early language learning is essential for fluency, Zambia's education stakeholders also reasoned that a transitional MOI policy would hinder the effective acquisition of the economically useful language, English. Although the negative impact of the all-English MOI policy on student learning was identified as early as 1977, due to political resistance to policy changes which might alter the status of English as the sole official language of the education system, Zambia did not implement any concrete changes to its MOI policy until after 1996. After this there was a very slow introduction of the use of languages other than English, first for teaching literacy, and then as MOI, but always with the goal of improving the acquisition of English (Banda, 1996; Kelly, 1991, pp. 111–113; Linehan, 2004).

The other excluded Purist case, New Zealand is in a row with Singapore, which until the late 1970s used an accommodating MOI strategy. In terms of their MOI policy trajectories, these two countries are unusual – with New Zealand moving from a Purist to an Accommodating MOI strategy and Singapore doing the reverse – which I discuss in the next chapter.

6.5.2 1975: Purist

#	HPUR	INTL_MOI	LITCUR	CDEM	POOR	DUAL_MOI	OUT	incl	cases
15	0	0	1	1	1	0	0	0	idn
19	0	1	0	0	1	0	0	0	gha,uga
20	0	1	0	0	1	1	**1**	1	**TZA**
21	0	1	0	1	0	0	0	0.5	**BWA,**cmr
23	0	1	0	1	1	0	0	0	gmb
29	0	1	1	1	0	0	0	0.667	**MUS,NZL,**sgp
31	0	1	1	1	1	0	0	0.5	ken,**ZMB**
41	1	0	1	0	0	0	**1**	1	**KOR**
49	1	1	0	0	0	0	**1**	1	**CIV,GAB**
51	1	1	0	0	1	0	**1**	1	**BEN,TGO**
52	1	1	0	0	1	1	**1**	1	**RWA**
53	1	1	0	1	0	0	**1**	1	**SEN**
55	1	1	0	1	1	0	**1**	1	**BFA**
56	1	1	0	1	1	1	**1**	1	**LSO**
58	1	1	1	0	0	1	**1**	1	**PHL**
59	1	1	1	0	1	0	**1**	1	**GNQ**
61	1	1	1	1	0	0	**1**	1	**JAM,TTO**

Table 6-3 Truth-table for membership to Purist set in 1975.

1975: parsimonious Boolean solution for membership to Purist set

solution consistency=1.000, solution coverage=0.778 (14/18 positive cases)

solution terms	cases covered by solution terms
HPUR+	KOR; CIV,GAB; BEN,TGO; RWA; SEN; BFA; LSO; PHL; GNQ; JAM,TTO
DUAL_MOI -> PUR	TZA; RWA; LSO; PHL

Comparing this truth-table to the one from 1965 shows that MOI policy is not static. Ghana (row #19) and Kenya (row #31) moved from the Purist to the Pragmatic set, and Tanzania (row #20) and the Philippines (row #58) did the reverse.

The first term in this Boolean solution (HPUR) shows the continuing influence of pre-independence MOI policies. In 1975 all of the cases coded as HPUR=1 used Purist MOI policies. However this does not mean that the Purist strategy was always used to reproduce the pre-independence national linguistic market. In South Korea (KOR) a Purist MOI policy was used to eliminate the use of the

language of colonization, Japanese, and to reinstate Korean as the dominant language of the national linguistic market. I discuss the MOI strategies of countries whose transitions to independence were marked by conflict later in this chapter.

The second term (DUAL_MOI) covers a distinctive sub-type of the Purist MOI policy, here used by Rwanda, where students learn through two languages: an official language (with high status within the international linguistic market) and a national language (considered to be indigenous to the country). This MOI strategy has the aim of creating a shared "authentic" national linguistic identity whilst also promoting the acquisition of a high status international language. In the next wave of analysis it can be seen that Botswana (row #21, excluded from this solution) also adopts a dual MOI strategy.

Other Purist cases excluded from this Boolean solution are Mauritius and New Zealand (row #29), and Zambia (row #31).

6.5.3 1985: Purist

#	HPUR	INTL_MOI	LITCUR	CDEM	POOR	DUAL_MOI	OUT	incl	cases
11	0	0	1	0	1	0	0	0	idn
23	0	1	0	1	1	0	0	0	gmb
25	0	1	1	0	0	0	0	0	cmr
27	0	1	1	0	1	0	0	0	gha,ken
28	0	1	1	0	1	1	**1**	1	**TZA**
29	0	1	1	1	0	0	**1**	1	**MUS,NZL,SGP**
30	0	1	1	1	0	1	**1**	1	**BWA**
31	0	1	1	1	1	0	0	0.5	uga,**ZMB**
41	1	0	1	0	0	0	**1**	1	**KOR**
51	1	1	0	0	1	0	**1**	1	**BEN,BFA,TGO**
52	1	1	0	0	1	1	**1**	1	**RWA**
53	1	1	0	1	0	0	**1**	1	**CIV,SEN**
57	1	1	1	0	0	0	**1**	1	**GAB**
58	1	1	1	0	0	1	**1**	1	**PHL**
59	1	1	1	0	1	0	**1**	1	**GNQ**
61	1	1	1	1	0	0	**1**	1	**JAM,TTO**
64	1	1	1	1	1	1	**1**	1	**LSO**

Table 6-4 Truth-table for membership to Purist set in 1985.

1985: parsimonious Boolean solution for membership to Purist set

Solution consistency=1.00, solution coverage=0.974 (18/19 positive cases)

solution terms	cases covered by solution terms
HPUR+	KOR; BEN,BFA,TGO; RWA; CIV,SEN; GAB; PHL; GNQ; JAM,TTO; LSO
DUAL_MOI +	TZA; BWA; RWA; PHL; LSO
CDEM*~POOR -> PUR	MUS,NZL,SGP; BWA; CIV,SEN; JAM,TTO

For the 1985 truth-table only one Purist case, Zambia, is not covered by the Boolean solution. The solution coverage has improved, compared to 1975, because Singapore (SGP) had changed to an all-English MOI policy, making row #29 consistent and Botswana had adopted a dual MOI strategy.

The Boolean solution resembles the one for 1975 but has a third term, CDEM*~POOR. This covers richer countries where citizens have at least some voice in politics. This suggests that, at this point in time, the use of community languages as MOI may have been unpopular, or seen as unnecessary, in these slightly better-off countries. In my analysis of the Pragmatic MOI policy type I

show that in the Twenty-first Century all of the cases covered by this term (except Singapore, which teaches them as compulsory subjects) accommodated some use of community languages as MOI in early primary school.

6.5.4 1995: Purist

#	HPUR	INTL_MOI	LITCUR	CDEM	POOR	DUAL_MOI	OUT	incl	cases
9	0	0	1	0	0	0	0	0	idn,kaz,tkm
11	0	0	1	0	1	0	0	0	tjk
13	0	0	1	1	0	0	0	0	blr,hrv,cze,est, lva,ltu,svk,svn, mkd,ukr
15	0	0	1	1	1	0	0	0	kgz
19	0	1	0	0	1	0	0	0	eri,gmb
23	0	1	0	1	1	0	0	0	gha,uga
27	0	1	1	0	1	0	0	0	cmr,ken
29	0	1	1	1	0	0	0	0.5	**MUS**,nam,nzl, **SGP**
30	0	1	1	1	0	1	**1**	1	**BWA**
31	0	1	1	1	1	0	0	0	zmb
32	0	1	1	1	1	1	**1**	1	**TZA**
45	1	0	1	1	0	0	**1**	1	**KOR**
51	1	1	0	0	1	0	**1**	1	**CIV,TGO**
55	1	1	0	1	1	0	**1**	1	**BEN,BFA,SEN**
59	1	1	1	0	1	0	**1**	1	**GNQ**
60	1	1	1	0	1	1	**1**	1	**RWA**
61	1	1	1	1	0	0	**1**	1	**GAB,JAM,TTO**
62	1	1	1	1	0	1	**1**	1	**LSO,PHL**

Table 6-5 Truth-table for membership to Purist set in 1995.

1995: parsimonious Boolean solution for membership to Purist set

Solution consistency=1.00, solution coverage=0.882 (15/17 positive cases)

solution terms	cases covered by solution terms
HPUR+	KOR; CIV,TGO; BEN,BFA,SEN; GNQ; RWA; GAB,JAM,TTO; LSO,PHL
DUAL_MOI -> PUR	BWA; TZA; RWA; LSO,PHL

This truth-table contains many new cases. Most are new Eurasian states which were formed directly, or indirectly, by the collapse of the Soviet Union. Most of these used Accommodating MOI policies that allow MOI choice in both primary and secondary school – which I discuss in the next chapter. I see this 1995 truth-

table as representing a transitional period for primary school MOI policies. The global adoption and promotion of the concept of EFA in 1990 had led to some questioning of the equitability and efficiency of strictly Purist MOI policies but there was little change to MOI policies yet. Unlike in 1985, Singapore and Mauritius (row #29) are now not covered by the Boolean solution because New Zealand has moved to Accommodating the use of the indigenous Māori language throughout its education system and a new case, Namibia, joined this set of not-poor countries which have at least partial political freedom (CDEM*~POOR).

6.5.5 2005: Purist

#	HPUR	INTL_MOI	LITCUR	CDEM	POOR	DUAL_MOI	OUT	incl	cases
9	0	0	1	0	0	0	0	0.333	blr,kaz,**TKM**
11	0	0	1	0	1	0	0	0	tjk
13	0	0	1	1	0	0	0	0	hrv,cze,est,idn, lva,ltu,svk,svn, mkd,ukr
15	0	0	1	1	1	0	0	0	kgz
19	0	1	0	0	1	0	0	0	eri
23	0	1	0	1	1	0	0	0.5	gmb,**GHA,TLS**, zmb
25	0	1	1	0	0	0	0	0	cmr
29	0	1	1	1	0	0	0	0.5	**BWA**,ken,**MUS**, nam,nzl,**SGP**
31	0	1	1	1	1	0	0	0	UGA
32	0	1	1	1	1	1	**1**	1	**TZA**
45	1	0	1	1	0	0	**1**	1	**KOR**
51	1	1	0	0	1	0	**1**	1	**CIV,TGO**
52	1	1	0	0	1	1	0	0	rwa
55	1	1	0	1	1	0	**1**	1	**BEN,BFA,SEN**
57	1	1	1	0	0	0	**1**	1	**GNQ**
61	1	1	1	1	0	0	0	0.667	**GAB,JAM**,tto
62	1	1	1	1	0	1	0	0.5	**LSO**,phl

Table 6-6 Truth-table for membership to Purist set in 2005.

2005: parsimonious Boolean solution for membership to Purist set

Solution consistency=1.00, solution coverage=0.471 (8/17 positive cases)

solution terms	cases covered by solution terms
HPUR*~INTL_MOI +	KOR
~HPUR*DUAL_MOI +	TZA
HPUR*~CDEM*~DUAL_MOI +	CIV, TGO; GNQ
HPUR*CDEM*POOR -> PUR	BEN, BFA, SEN

This Boolean solution has very low coverage, with 9 of the 17 cases with Purist MOI policies being excluded from the solution (Turkmenistan, Ghana, Timor Leste, Botswana, Mauritius, Singapore, Gabon, Jamaica, Lesotho). The solution terms show that HPUR is no longer sufficient for the outcome Purist. By inspection of the rows coded as HPUR=1, we can see that this is because Rwanda, Trinidad and Tobago, and the Philippines (rows #52, #61, #62) are not using Purist MOI policies. I discuss Rwanda's MOI changes in chapter 8. The move of Trinidad and Tobago and the Philippines away from using Purist MOI policies in order to create more equitable access to education is one reason for the low solution coverage. The other inconsistent rows are #9, #23, and #29. I discuss Turkmenistan's removal of MOI choice from its school system in the next chapter. Row #23 illustrates the diverse range of MOI strategies that have been adopted by countries with similar characteristics in order to improve the performance of their education systems. The four countries in this row, Gambia, Ghana, Timor Leste, and Zambia, are all poor countries with low levels of literacy that have at least some political freedom (POOR=1, LITCUR=0, CDEM=1). Whilst Gambia and Zambia have MOI policies which allow some choice of MOI, Timor Leste, which experienced a violent transition to independence, is moving towards a dual MOI policy and Ghana has, once again, moved to an all-English MOI policy as a strategy for improving the acquisition of this economically important high-status language.

6.5.6 2015: Purist

#	HPUR	INTL_MOI	LITCUR	CDEM	POOR	DUAL_MOI	OUT	incl	cases
9	0	0	1	0	0	0	0	0.25	blr,kaz,tjk,**TKM**
13	0	0	1	1	0	0	0	0	hrv,cze,est,idn,kgz, lva,ltu,svk,svn, mkd,ukr
15	0	0	1	1	1	0	**1**	1	**TZA**
19	0	1	0	0	1	0	0	0	gmb,uga
22	0	1	0	1	0	1	0	0	tls
25	0	1	1	0	0	0	0	0	cmr
27	0	1	1	0	1	0	0	0	eri
29	0	1	1	1	0	0	0	0.143	gha,ken,mus,nam, nzl,**SGP**,zmb
30	0	1	1	1	0	1	**1**	1	**BWA**
45	1	0	1	1	0	0	**1**	1	**KOR**
53	1	1	0	1	0	0	**1**	1	**CIV**
55	1	1	0	1	1	0	**1**	1	**BEN,BFA,SEN,TGO**
57	1	1	1	0	0	0	**1**	1	**GNQ,GAB**
60	1	1	1	0	1	1	**1**	1	**RWA**
61	1	1	1	1	0	0	0	0	jam,lso,tto
62	1	1	1	1	0	1	0	0	phl

Table 6-7 Truth-table for membership to Purist set in 2015.

2015: parsimonious Boolean solution for membership to Purist set

Solution consistency=1.00, solution coverage=0.846 (11/13 positive cases)

solution terms	cases covered by solution terms
HPUR*~INTL_MOI +	KOR
HPUR*~CDEM +	GNQ,GAB; RWA
~HPUR*LITCUR*DUAL_MOI +	BWA
HPUR*~LITCUR +	CIV; BEN,BFA,SEN,TGO
~INTL_MOI*POOR - > PUR	TZA

The 2015 truth-table has fewer inconsistent rows than in 2005, so its Boolean solution covers a larger proportion of the Purist cases. The cases not covered by the solution are Turkmenistan (row #9) and Singapore (row #29). The main reason for this improvement in consistency is that five cases which were categorized as having Purist MOI policies in 2005 (Ghana, Timor Leste, Mauritius, Jamaica and Lesotho) have moved to supporting more choice of MOI in their primary schools. In the next part of my analysis I focus on the increase over time of the use of Pragmatic MOI policies.

6.6 Longitudinal analysis of membership to the Pragmatic MOI policy type

6.6.1 1965: Pragmatic

#	HPRA	INTL_MOI	LITCUR	CDEM	POOR	DUAL_MOI	OUT	incl	cases
9	0	0	1	0	0	0	0	0	kor
17	0	1	0	0	0	0	0	0	civ,gab
19	0	1	0	0	1	0	0	0	ben,tgo
20	0	1	0	0	1	1	0	0	rwa
21	0	1	0	1	0	0	0	0	sen
23	0	1	0	1	1	0	0	0	bfa
25	0	1	1	0	0	0	**1**	1	**PHL**
29	0	1	1	1	0	0	0	0	jam,sgp,tto
43	1	0	1	0	1	0	**1**	1	**IDN**
49	1	1	0	0	0	0	0	0	cmr
51	1	1	0	0	1	0	0	0.667	gha,**UGA**,**TZA**
55	1	1	0	1	1	0	0	0.5	**GMB,**ken
61	1	1	1	1	0	0	0	0	nzl
63	1	1	1	1	1	0	0	0	zmb

Table 6-8 Truth-table for membership to the Pragmatic set in 1965

Unlike the characteristic HPUR (no MOI choice in the pre-independence education system) which was often a sufficient condition for Purist MOI policies, the relationship between HPRA (there was MOI choice in primary school during the pre-independence era) and the use of Pragmatic MOI policies is much looser. In 1965 there were only five countries using a Pragmatic MOI policy and only two of these are in consistent rows (OUT=1), so I have not produced a Boolean solution for this wave of analysis.

The cases in consistent rows are Indonesia (row #43) and the Philippines (row #25). In 1965 they did not have very low levels of literacy (LITCUR=1) and their citizens had little political freedom (CDEM=0). Although both used Pragmatic MOI policies their language planning goals were quite different. After a violent

transition to independence, Indonesia was using its MOI policy to replace the language of colonial power, Dutch, with a new national language, bahasa Indonesia. In contrast, in the Philippines MOI policy was used to strengthen and reproduce the position of English, the language of its last colonial power, the USA, as the dominant language of its linguistic market – reflecting the strong influence that the USA had in shaping the Philippines post-war education system. The Philippines is one of the cases which sees the most change to its MOI policy and I discuss its journey from Pragmatic, to Purist, to dual, and back to Pragmatic later in this chapter.

6.6.2   1975: Pragmatic

#	HPRA	INTL_MOI	LITCUR	CDEM	POOR	DUAL_MOI	OUT	incl	cases
9	0	0	1	0	0	0	0	0	kor
17	0	1	0	0	0	0	0	0	civ,gab
19	0	1	0	0	1	0	0	0	ben,tgo
20	0	1	0	0	1	1	0	0	rwa
21	0	1	0	1	0	0	0	0	sen
23	0	1	0	1	1	0	0	0	bfa
24	0	1	0	1	1	1	0	0	lso
26	0	1	1	0	0	1	0	0	phl
27	0	1	1	0	1	0	0	0	gnq
29	0	1	1	1	0	0	0	0	jam,sgp,tto
47	1	0	1	1	1	0	**1**	1	**IDN**
51	1	1	0	0	1	0	**1**	1	**GHA,UGA**
52	1	1	0	0	1	1	0	0	tza
53	1	1	0	1	0	0	0	0	bwa,cmr
55	1	1	0	1	1	0	**1**	1	**GMB**
61	1	1	1	1	0	0	0	0	mus,nzl
63	1	1	1	1	1	0	0	0.5	**KEN**,zmb

Table 6-9 Truth-table for membership to the Pragmatic set in 1975

1975: conservative Boolean solution for membership to the Pragmatic set

Solution consistency=1.00, solution coverage=0.80 (4/5 positive cases)

solution terms	cases covered by solution terms
HPRA*INTL_MOI*~LITCUR*POOR*~DUAL_MOI +	GHA, UGA; GMB
HPRA*~INTL_MOI*LITCUR*CDEM*POOR*~DUAL_MOI	IDN
-> PRA	

In 1975 there was still only a handful of cases using Pragmatic MOI policies. A comparison of rows #51, #55 and #63 between 1965 and 1975 shows that the 1975 truth-table is more consistent because some of the cases that had a history of a British Pragmatic colonial MOI policy had changed their MOI policies. Both Kenya and Ghana returned to supporting MOI choice in early primary school. In contrast, Tanzania's government had restructured its education system to support its policy of African socialism ("Ujamaa") and had introduced a dual MOI policy to create a shared national linguistic identity through the use of Kiswahili, whilst still promoting the acquisition of the economically useful international language, English.

6.6.3 1985: Pragmatic

#	HPRA	INTL_MOI	LITCUR	CDEM	POOR	DUAL_MOI	OUT	incl	cases
9	0	0	1	0	0	0	0	0	kor
19	0	1	0	0	1	0	0	0	ben,bfa,tgo
20	0	1	0	0	1	1	0	0	rwa
21	0	1	0	1	0	0	0	0	civ, sen
25	0	1	1	0	0	0	0	0	gab
26	0	1	1	0	0	1	0	0	phl
27	0	1	1	0	1	0	0	0	gnq
29	0	1	1	1	0	0	0	0	jam,sgp,tto
32	0	1	1	1	1	1	0	0	lso
43	1	0	1	0	1	0	**1**	1	**IDN**
55	1	1	0	1	1	0	**1**	1	**GMB**
57	1	1	1	0	0	0	0	0	cmr
59	1	1	1	0	1	0	1	1	**GHA,KEN**
60	1	1	1	0	1	1	0	0	tza
61	1	1	1	1	0	0	0	0	mus,nzl
62	1	1	1	1	0	1	0	0	bwa
63	1	1	1	1	1	0	0	0.5	**UGA**,zmb

Table 6-10 Truth-table for membership to the Pragmatic set in 1985

1985: conservative Boolean solution for membership to the Pragmatic set

Solution consistency=1.00, solution coverage=0.80 (4/5 positive cases)

solution terms	cases covered by solution terms
HPRA*LITCUR*~CDEM*POOR*~DUAL_MOI +	IDN; GHA,KEN
HPRA*INTL_MOI*~LITCUR*CDEM*POOR*~DUAL_MOI	GMB
-> PRA	

During the 1970s and 1980s many of the cases using Pragmatic MOI policies experienced coups, revolutions and non-democratic transitions of government but these had little impact on MOI policies. Cases shifted rows in the truth-table due to changes in literacy rates (LITCUR) and political freedom (CDEM) but there was no change to the cases (Indonesia, Kenya, Ghana, Uganda and the Gambia) using Pragmatic MOI policies.

6.6.4 1995: Pragmatic

#	HPRA	INTL_MOI	LITCUR	CDEM	POOR	DUAL_MOI	OUT	incl	cases
9	0	0	1	0	0	0	0	0	kaz,tkm
11	0	0	1	0	1	0	0	0	tjk
13	0	0	1	1	0	0	0	0	blr,hrv,cze,est, lva,ltu,kor,svk, svn,mkd,ukr
15	0	0	1	1	1	0	0	0	kgz
19	0	1	0	0	1	0	0	0	civ,tgo
23	0	1	0	1	1	0	0	0	ben,bfa,sen
27	0	1	1	0	1	0	0	0	gnq
28	0	1	1	0	1	1	0	0	rwa
29	0	1	1	1	0	0	0	0.2	gab,jam,**NAM**, sgp,tto
30	0	1	1	1	0	1	0	0	lso,phl
41	1	0	1	0	0	0	0	0	idn
51	1	1	0	0	1	0	**1**	1	**ERI,GMB**
55	1	1	0	1	1	0	**1**	1	**GHA,UGA**
59	1	1	1	0	1	0	0	0.5	cmr,**KEN**
61	1	1	1	1	0	0	0	0	mus,nzl
62	1	1	1	1	0	1	0	0	bwa
63	1	1	1	1	1	0	**1**	1	**ZMB**
64	1	1	1	1	1	1	0	0	tza

Table 6-11 Truth-table for membership to the Pragmatic set in 1995

1995: conservative Boolean solution for membership to the Pragmatic set

Solution consistency=1.00, solution coverage=0.714 (5/7 positive cases)

solution terms	cases covered by solution terms
HPRA*INTL_MOI*~LITCUR*POOR*~DUAL_MOI	ERI,GMB; GHA,UGA
+	
HPRA*INTL_MOI*CDEM*POOR*~DUAL_MOI	GHA,UGA; ZMB
-> PRA	

In the 1990s the number of cases in this study nearly doubled and two of these newly independent states, Eritrea and Namibia, used Pragmatic MOI policies as

part of their strategy to reduce the status of official colonial-era languages and create new national linguistic identities.

The 1995 truth-table shows the beginnings of the impact of the EFA movement on MOI policy with the number of countries using Pragmatic MOI policies increasing. The use of community languages as MOI was given increased international promotion as a model of educational best-practice for ensuring more equitable access to education. Zambia (row #63) is one of the cases where the arguments for the introduction of more choice in early primary MOI were based on the principle that it would make education more effective and more relevant to children from lower socio-economic groups.

6.6.5 2005: Pragmatic

#	HPRA	INTL_MOI	LITCUR	CDEM	POOR	DUAL_MOI	OUT	incl	cases
9	0	0	1	0	0	0	0	0	blr,kaz,tkm
11	0	0	1	0	1	0	0	0	tjk
13	0	0	1	1	0	0	0	0	hrv,cze,est,lva, ltu,kor,svk,svn, mkd,ukr
15	0	0	1	1	1	0	0	0	kgz
19	0	1	0	0	1	0	0	0	civ tgo
20	0	1	0	0	1	1	0	0	rwa
23	0	1	0	1	1	0	0	0	ben,bfa,sen
25	0	1	1	0	0	0	0	0	gnq
29	0	1	1	1	0	0	0	0.4	gab,jam,**NAM**, sgp,**TTO**
30	0	1	1	1	0	1	0	0.5	lso,**PHL**
45	1	0	1	1	0	0	0	0	idn
51	1	1	0	0	1	0	1	1	**ERI**
55	1	1	0	1	1	0	0	0.5	**GMB**,gha,tls, **ZMB**
57	1	1	1	0	0	0	0	0	cmr
61	1	1	1	1	0	0	0	0.25	bwa,**KEN**,mus, nzl
63	1	1	1	1	1	0	1	1	**UGA**
64	1	1	1	1	1	1	0	0	tza

Table 6-12 Truth-table for membership to the Pragmatic set in 2005

At the beginning of the Twenty-first Century the MOI policies of many of the Purist and Pragmatic cases were experiencing change. Countries which had no pre-independence tradition of using Pragmatic MOI policies (HPRA=0) began to allow the limited use of community languages as MOI as a strategy to support the more effective acquisition of the dominant MOI. With my Purist-Pragmatic coding this change is only evident for Trinidad and Tobago (row #29), but other "traditionally Purist" countries also engaged with this idea. Whilst globally-promoted models of educational best-practice, such as the use of community languages as MOI, can influence government decisions on MOI policy, they do not dictate them. As a case in point, in 2002 Ghana returned to using a Purist all-English MOI policy, justifying the move as supporting the more effective acquisition of the country's

official language. Due to this mixed policy movement, only two Pragmatic cases (Eritrea, row #51 and Uganda, row 63) are in consistent truth-table rows, so I have not produced a Boolean solution for this truth-table.

6.6.6 2015: Pragmatic

#	HPRA	INTL_MOI	LITCUR	CDEM	POOR	DUAL_MOI	OUT	incl	cases
9	0	0	1	0	0	0	0	0	blr,kaz,tjk,tkm
13	0	0	1	1	0	0	0	0	hrv,cze,est,kgz, lva,ltu,kor,svk, svn,mkd,ukr
21	0	1	0	1	0	0	0	0	civ
23	0	1	0	1	1	0	0	0	ben,bfa,sen,tgo
25	0	1	1	0	0	0	0	0	gnq,gab
28	0	1	1	0	1	1	0	0	rwa
29	0	1	1	1	0	0	**1**	0.8	**JAM,LSO,NAM**, sgp,**TTO**
30	0	1	1	1	0	1	**1**	1	**PHL**
45	1	0	1	1	0	0	0	0	idn
47	1	0	1	1	1	0	0	0	tza
51	1	1	0	0	1	0	**1**	1	**GMB,UGA**
54	1	1	0	1	0	1	**1**	1	**TLS**
57	1	1	1	0	0	0	0	0	cmr
59	1	1	1	0	1	0	**1**	1	**ERI**
61	1	1	1	1	0	0	**1**	0.8	**GHA,KEN,MUS**, nzl,**ZMB**
62	1	1	1	1	0	1	0	0	bwa

Table 6-13 Truth-table for membership to the Pragmatic set in 2015

2015: conservative Boolean solution for membership to the Pragmatic set

Solution consistency=0.867 (2 inconsistent cases), solution coverage=1.00

solution terms	cases covered by solution terms
~HPRA*INTL_MOI*LITCUR*CDEM*~POOR +	JAM, LSO, NAM, sgp, TTO; PHL
HPRA*INTL_MOI*~CDEM*POOR*~DUAL_MOI +	GMB, UGA; ERI
INTL_MOI*LITCUR*CDEM*~POOR*~DUAL_MOI +	JAM, LSO, NAM, SGP, TTO; GHA, KEN, MUS, nzl, ZMB
HPRA*INTL_MOI*~LITCUR*CDEM*~POOR*DUAL_MOI <-> PRA	TLS

In 2015, the end of the Millennium Development Goal era, more cases were using Pragmatic MOI policies that in 2005. The first term in the Boolean solution (which includes the inconsistent case Singapore) highlights the adoption of Pragmatic MOI policies by countries that had not used them previously (HPRA=0) as a strategy for improving the acquisition of the dominant official language. This row includes Namibia, for which the use of a Pragmatic MOI policy was also a strategy for lowering the status of the dominant language of the colonial era, Afrikaans.

There are just two cases, The Gambia and Uganda (row #51) which have been members of the Pragmatic set throughout the period of this study. Whilst their MOI policies always included the use of community languages as MOI in early primary school, there was often little practical support for their use. The Twenty-first Century saw increased efforts to change this as a strategy for improving the effectiveness of schooling and raising literacy levels in these two low income countries.

Although all of the terms in this Boolean solution indicate that using a language with high status within the international linguistic market (INTL_MOI=1) is a necessary condition for adopting a Pragmatic MOI policy, this is not the case. In 2015 Indonesia continued to offer MOI choice in lower primary school but, because it also adopted the Opportunistic strategy of allowing some use of international languages as MOI in secondary school, it was no longer coded as belonging to the Pragmatic set.

6.7 MOI policy pathways between the Purist and Pragmatic policy types

This longitudinal QCA of movement between Purist and Pragmatic policy types has shown that changes to MOI policy types cannot be understood simply in

terms of which combinations of truth-table case characteristics are present in a particular country at a particular time, even though those characteristics are frequently invoked in discussions of MOI policy choice within the academic literature. The types of MOI policy adopted are also dependent upon the linguistic state-building goals of the state and the beliefs of policy makers as to how MOI policy can be used to achieve those goals. These beliefs are shaped to an extent by levels of language use and literacy within the state but are also influenced by established traditions of MOI policy and influences external to the state, such as the Education For All era and real or perceived demands for access to literacy in high-status international languages.

The (limited) influence of all of these factors can be seen in the Venn diagram on the next page (Figure 6-1) which gives an overview of the amount of MOI choice supported in state primary schools in 2015 by the cases which have ever used a Purist or Pragmatic type MOI policy.

The cases are grouped into sets using three of the case characteristics from the truth-tables: CDEM (administrations with at least some political freedom); POOR (low income countries); and HPUR (a pre-independence tradition of not allowing MOI choice in primary school). Within each of the eight segments of the Venn diagram the presence of the characteristic is indicated with its name being written in upper case, and its absence by it being written in lower case.

The country codes for states with Purist MOI policies are shown in upper case, and those with Pragmatic MOI policies (or other policies which allow MOI choice) are shown in lower case. The number in square brackets [ ] following the country code shows the amount of MOI choice. This ranges from 0 = no choice, to 4 = full primary education is available through more than one language. An asterisk * demotes that the country uses a dual-language MOI policy.
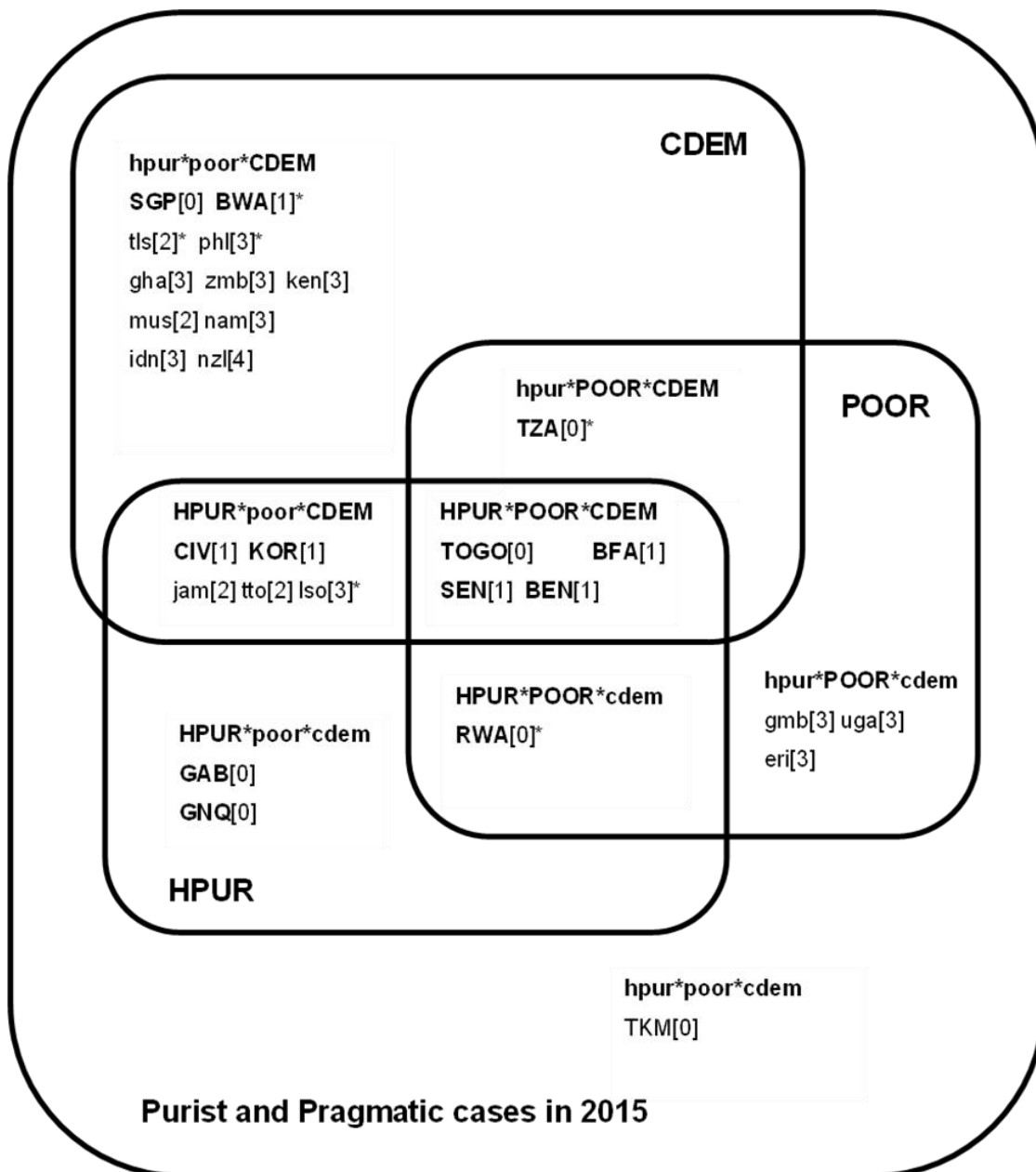
Figure 6-1Venn diagram showing membership to Purist [BOLD, UPPERCASE] and Pragmatic [lowercase] sets in 2015

The Venn diagram shows that most of the cases classified as HPUR have retained Purist MOI policies. Though it is noticeable that nearly all of the states which are also classified as CDEM (at least some political freedom) have introduced a little MOI choice. For the low income countries (POOR), inherited MOI traditions still appear to have a strong influence on MOI policy type, though Tanzania is a notable exception to both of these trends.

On their own these case characteristics provide limited insight into the MOI policy trajectories of individual cases; however, they do provide a useful context for understanding the diversity of MOI choice seen over the course of this longitudinal QCA. I identified four distinct MOI strategies which have been used by states to implement a "no-choice" secondary school MOI policy.

These strategies are: the "softening" of traditionally Purist MOI policies; Purist strategies which use "dual language" MOIs – teaching using both a national and an international language; oscillation between Purist and Pragmatic strategies linked to debate over whether Pragmatic MOI policies "help or hinder" the acquisition of international languages; and states which experienced "violent transitions" to independence using their MOI policies to create a new national linguistic identity. In the second part of this chapter I discuss these strategies in greater detail.

6.7.1 Softening of traditionally Purist MOI policies

The table of MOI policy changes in Chapter 5 shows that several of the countries which inherited Purist MOI policy traditions (HPUR=1) have allowed, on paper at least, some use of community languages as MOI in primary school. This strategy has been promoted by regional as well as international bodies, not only to improve access to basic education, but also for social and cultural reasons. This can be seen in the African Union (AU), (successor body to the Organization of African Unity, OAU), which all of the African cases are members of. The OAU's 1976 *Cultural Charter for Africa* called for *"the introduction and intensification of the teaching in national languages in order to accelerate the economic, social, political and cultural development in our states"* (Organization of African Unity, 1976, pts. III, Article 6). This was updated in 2006 and Article 18 of the new *Charter for African Cultural Renaissance* makes an explicit link between the development of African languages and the cultural, economic and social development of African states, recommending that: *"The African States should prepare and implement the reforms necessary for the introduction of African languages into education."* (African Union, 2006). These charters created a regional policy making environment which was officially welcoming to the use of community languages in school. But this seems to have had little impact on the amount of MOI choice supported by states in practice. For example, in 1975, as

part of its New School Model (école nouvelle), Benin's socialist government legislated that national languages would be used in schools (first taught as subject and then used as MOI) as part of a strategy of creating a political and linguistic identity distinct from that of France. This MOI policy goal was reiterated in democratic Benin's 2003 Education Law (Article 8). Despite work being put into corpus planning for Benin's national languages, in 2013 Benin's Ministry of Education conceded that national languages had yet to be used in any significant way within the education system, but recommitted itself to their implementation (David-Gnahoui, 2002, p. 103; Ministeres en Charge de l'Education: Benin, 2013, p. 13; Orientation de l'Education Nationale En République Du Bénin, 2003b).

In the Twenty-first Century there is a trend for more inclusion in education laws of the right to use community languages within schools and the introduction of mother-tongue MOI pilot studies in countries with traditionally Purist MOI policies. This aligns with a change, identified by Albaugh (2009) in the French as a second language learning strategy promoted by French language planners from the late Twentieth Century onwards. During the 1989 Francophonie summit, rather than continuing to exclude community languages entirely from Francophone Africa's schools, it was recommended that they should be used as tools to improve the effectiveness of teaching French in school. The aim of teaching initial literacy through a student's first language was not to raise the status of these community languages by using them in schools, but, rather, to promote a more efficient strategy for creating French speakers. This would, in turn, reinforce the status of French as the dominant language of these Francophone states' linguistic markets. This change in language acquisition methodology was then promoted through French-funded bilateral aid projects for education in Africa (la Francophonie, 1989, p. 214) (Albaugh, 2009).

There is evidence that the international shift to promoting equitable, rather than equal, educational opportunities has led to greater awareness by policy makers, on paper at least, of the impact that MOI policies can have on learning, and not just in Africa. In 2008 UNESCO's International Bureau of Education's (IBE) *International Conference on Education* had the theme "*Inclusive education: the way of the future".* Many of the papers presented by states which are usually portrayed as having rigid single-language MOI policies made some mention of adapting their MOI policies for certain groups of students. Even South Korea, a

country with considers its population to be linguistically and culturally homogeneous gave some consideration to the use of MOIs other than Korean for its national students which do not speak Korean as their first language, conceding as a last resort that, *"If it is impossible for the student to speak and write in Korean, learning in their native language should also be considered"* (Republic of Korea, 2008, p. 73). Again, the aim of the use of community languages as MOI is to facilitate acquisition of the official language. It remains to be seen whether this recognition of the benefits to some students of a more flexible MOI policy is ever translated into classroom practice.

A distinct strand in the softening of Purist MOI policies is seen in the Caribbean islands of Trinidad and Tobago and Jamaica. They inherited from their British colonial past an MOI tradition of teaching and using English as a first language and disparaging local languages as being merely ungrammatical forms of the official language, English. There was academic recognition from the 1960s of "non-standard" Caribbean languages, such as Jamaican Patois and Trinidad Creole, being grammatically complete languages in their own right. But it was not until the EFA era that these community languages were promoted by policy makers as languages of education (Devonish & Carpenter, 2007).

The introductory notes of Trinidad and Tobago's 1999 primary school syllabus for language arts recognised that Standard English was not the first language of the majority of students and that this affected learning, ". . *. In the Trinidad and Tobago context, the teaching of Standard English, which is the second language of most of our learners, must take account of the Trinidad vernacular of Trinidad Creole. Relevant strategies must be employed*. . ." (MoE (Trinidad and Tobago), 1999). These "relevant strategies" included the use of Trinidad Creole "*as needed*" to make teaching more efficient.

In Jamaica, the language education policy developed by the Ministry of Education in 2001 recognised that *"the Jamaican language situation is a bilingual one, English being the official language, and Jamaican Creole (JC) an English-lexicon creole, being the language most widely used in the general speech community"* (Brown-Blake, 2007). This led to primary education reforms in 2006 where Standard Jamaican English (SJE) and Jamaican Creole (JC) were recognised and treated as two different languages; and literacy and oracy skills in both languages were promoted (Devonish & Carpenter, 2007; Government of

Jamaica, n.d.). In both of these cases, the recognition and use of community languages was introduced to raise school standards by improving the acquisition of Standard English, thus maintaining its position as the dominant language within each state's linguistic market.

6.7.2 Dual Language MOI strategy

I identified six countries which used a dual language Purist MOI strategy (DUAL=1). Whilst offering no choice of MOI, they used two languages for teaching and learning in their schools, a national language and an international language. Which language is used for teaching may depend upon the subject being taught (as with the use of Filipino and English in the Philippines between 1974 and 1999) or the level of schooling (as with the use of Kiswahili in primary school and English in secondary school in Tanzania since 1967) (Roy-Campbell, 1992, p. 144; Symaco, 2017, p. 94). This sub-type does not cover the MOI policies of countries such as Kenya where the National Language, Kiswahili, is a compulsory language-as-subject in primary and secondary school but is not used as a compulsory MOI at any point (A. Mazrui, 2012, p. 146).

This dual language approach to linguistic state building is designed to create a distinct national linguistic identity for the independent nation, whilst at the same time promoting the acquisition of a high-status international language. It is used by countries with high (Tanzania, Timor Leste, Philippines), medium (Botswana) and low (Lesotho and Rwanda) linguistic diversity. For the countries with lower linguistic diversity (Lesotho, Rwanda, and to a lesser extent, Botswana) the dual language strategy had already been well established in the pre-independence era as a way of developing literacy whilst restricting access to the dominant language of the colonial power. In Tanzania, the Philippines, and most recently in Timor Leste, the dual MOI strategy has been used in spite of, or perhaps because of, the countries' were linguistic diversity. I discuss the "Opportunistic" nature of linguistically homogeneous Rwanda's manipulation of its dual language MOI strategy in Chapter 8. Here, I focus on how Tanzania used the dual language strategy in its schools to promote the use of Kiswahili as its national language, whilst ensuring the continued acquisition of the economically useful international language English.

Before independence, in East Africa the use of Kiswahili in official domains, including basic education, was most developed in Tanzania (then Tanganyika and Zanzibar). Although widely used as a working language of the British colonial administration, and having a higher status than other community languages, it had a lower status within the colonial linguistic market than the official language, English. As part of in the implementation of President Nyerere's policy of Ujamaa (African Socialism) in 1967 Tanzania's school system was reformed, with a vocational, eight-year, primary school programme for the majority of students and access to academic secondary education deliberately restricted. Kiswahili was made the language of primary education and English, as in the colonial era, remained the language of secondary education (Trudell, 2016, pp. 76–79). Unlike Indonesia, which chose to remove the use of the language of its colonial power, Dutch, from its education system completely to support the creation of a new, independent, linguistic identity, in Tanzania the decision was made to use a dual language MOI strategy in order to maintain the acquisition of English, whilst establishing Kiswahili as the shared national language.

President Nyerere justified his government's decision to do this by highlighting the social and economic opportunities, both for individuals and for the country as a whole, that could be accessed through English. In 1974 President Nyerere declared *"Tanzanians would be foolish to reject English. We are a small country. English and French are African languages . . . It is a very useful language"* (Abdulaziz, 1991, pp. 399–400) and in 1984 he described English as "*the Kiswahili of the world"* (Yahya-Othman & Batibo, 1996, p. 379).

The decision of independent Tanzania to introduce Kiswahili as the common language for primary education contrasts with the MOI choices of Kenya, where Kiswahili is also the national language and English is the language of secondary education. The first President of Kenya, Kenyatta, and his political party, the Kenya Africa National Union (KANU) strongly promoted the use of Kiswahili as unifying language and also as a symbol of Kenya's identity as an independent African country. Whilst there was some popular and political resistance to this, Kiswahili was taught as a compulsory, examinable, subject in all schools from independence and in 1974 it was given the status of national language and allowed to be used in parliamentary debate (A. M. Mazrui & Mazrui, 1996). However, the government of newly-independent Kenya did not follow the same African Socialism path as Tanzania, with its associated education reforms that

gave priority to vocational primary education. In addition, the promotion through schools of the acquisition of Kiswahili in pre-independence Kenya was stalled in the 1950s when the report of the British Government's Binns Commission recommended against the use of Kiswahili in schools outside of areas where it was the community language. This recommendation was made on the grounds that using Kiswahili as a lingua franca would damage tribal identity (which the commission members considered essential for the development of sound morals) and impede the learning of English (Sheffield, 1973). Whilst this policy was reversed under the recommendations of the independent Kenyan government's 1964 Ominde Commission, Kiswahili was never used as a common MOI. Instead, Kenya's language-in-education programme emphasised the goal of promoting the acquisition of English – the language of international opportunity (Eshwani, 1990; Gachukia, 1970). Although making Kiswahili a compulsory subject throughout primary and secondary education raised its status in Kenya above that of community languages, because it was not used as a compulsory MOI, the use of Kiswahili in formal domains is less well established than it is in Tanzania. Even when Kenya adopted a new constitution in 2010 and the *National Language*, Kiswahili was declared an *Official Language* – giving it the same legal status as English – English remained the sole medium of secondary and higher education (Kenya's Constitution of 2010, 2010, para. 7) (Kenya Institute of Curriculum Development (KICD), 2019). In Kenya the MOI debate centres around the most efficient way to ensure the acquisition of English, rather than whether English or Kiswahili should be the dominant language of education.

To establish Kiswahili as the shared national language of linguistically diverse Tanzania, its acquisition through the education system needed to be promoted. This was done in two ways. Soon after independence the English- and Asian-language primary streams were removed from the state-funded education system. This meant that all but the wealthiest families in a very poor country had to send their children to Kiswahili-medium primary schools. In addition, reflecting the "Purist" nature of this dual language MOI policy, no other community languages were allowed to be used as MOI. Effectively access to the opportunities available through education was conditional upon becoming literate in Kiswahili, thus ensuring that Kiswahili had a status above that of all other community languages within the national linguistic market. Tanzania's low levels

of political freedom (cdem=0) until the 1990s contributed to the establishment of Kiswahili as the sole medium of primary education because dissent by non-Swahili speakers was suppressed (Blommaert, 2014; Cameron, 1980; Roy-Campbell, 1992). Despite Tanzania adopting a more participatory form of democracy from the 1990s onwards, this exclusion of other community languages from use as MOI in primary school has remained. It is estimated that up to 15% of the community speak neither English, nor Kiswahili but this issue has been given little attention by Tanzania's education policy makers (Trudell, 2016, pp. 76–79). In a 2008 government assessment of the characteristics of children excluded from education, no mention was made of language as a barrier to accessing primary education (Tanzania MOEVT, 2008, p. 22).

Tanzania's continued exclusion of non-official languages from use as MOI is in contrast to the situation in the Philippines where the use of community languages as MOI in early primary school has been increasingly promoted since 1987, with the use of community languages as the MOI for the first three years of primary education being formalised in Section 4 of the 2013 Basic Education Act. The Philippines also used a dual language MOI system (Filipino and English) but, unlike Tanzania, there was not pre-independence tradition of using the national language as an MOI in state funded schooling. Instead, the US administration promoted the use of English as the sole MOI. It wasn't until 1974, under the authoritarian rule of President Marcos (1965-1886) that Filipino was introduced as a compulsory MOI for certain subjects across both primary and secondary education (Tupas, 2015). The Philippines is a highly linguistically and culturally diverse country and the use of Filipino as a national language was never fully accepted in the poorer Islamic South of the country which, until the signing of a peace agreement in 2014 was the site of severe internal conflict. This is in contrast to Tanzania, where Kiswahili is the first language of most people in the semi-autonomous Islamic region of Zanzibar, so the use of Kiswahili as an MOI in this region is widely accepted (The Fund for Peace, 2017). The introduction of support for the use of community languages as MOI in early primary school in the Philippines can be seen as an example of Ferguson's description of language rights as a "soft right" – a token acknowledgement of minority identity, granted to ensure wider acceptance of the legitimacy of the dominant national identity. Particularly in the South of the country, which had lower levels of literacy and

school attendance, by deferring the use of the two official languages (Filipino and English) as MOI to the end of primary school the Philippines' government could hopefully improve students' early educational experiences, making them and their families more inclined to accept and participate in other state institutions – thus contributing to overall state stability (Metila et al., 2016; Pe Symaco, 2013). Comparing both Tanzania and the Philippines to Botswana – another country which uses a dual language MOI policy, supports Ferguson's idea that MOI policies changes are driven more by potential benefit to the state than they are by benefit to individuals or particular community groups. Botswana is one of the most stable African states and has a mid-level of linguistic diversity. Setswana, the national language of Botswana is spoken as a first language by about three quarters of the population and used as the MOI for initial primary education. In the EFA-era Botswana's government has recognised that its policy of not using other community languages as MOI has had a negative impact on the schooling of non-Setswana speakers (Botswana MoEaSD, 2015). However, it has yet to make any concerted effort to support the provision of a wider choice of MOI in primary school (Bagwasi, 2017; Kamwendo & Mooko, 2006).

Considering the international language part of the dual language MOI policy, whilst the continued acquisition of English by Tanzanian students could have been implemented by teaching it as a compulsory subject, it has remained the MOI of Tanzania's secondary schools. The balance between the status and usage of Kiswahili and English as MOI within Tanzania's education system has been debated repeatedly (Trudell, 2016, pp. 76–79). Despite Kiswahili being increasingly used as the language of political debate and government business, English remained the MOI for secondary education. Tanzania's Institute of Education submitted a proposal in 1977 for the gradual, subject by subject, Kiswahilization of the secondary school curriculum. In 1982, citing the low standards of English ability of both teachers and students, a Presidential Commission appointed to study the language-in-education situation of Tanzania's schools made the recommendation that both secondary schools and universities should transition on a year-by-year basis to using Kiswahili as the dominant MOI, with English taught as a compulsory subject. In response to these recommendations, in 1984 the Ministry of Education made commitments to improve the teaching of both English and Kiswahili as subjects. However,

Kiswahili remained the MOI of primary education and English the MOI of secondary education (Mtesigwa, 2001; Roy-Campbell, 1992). This conflict between a desire, on the one part to raise the status of Kiswahili within the linguistic market so that the national language becomes, in practice as well as in law, the dominant language of the linguistic market, and on the other to maintain competence in the international language English, is just as pronounced in the Twenty-first Century. In 2014 the Ministry of Education and Vocational Training published a new language policy which, whilst promoting the learning of English, would make Kiswahili the MOI of secondary as well as primary education:

> *3.2.19. The national language of Kiswahili will be used for teaching and learning at all levels of education and training and the Government will put in place mechanisms to enable the use of this language to be sustainable and effective in providing productive education and training productively nationally and internationally.*
> *3.2.20. The government will continue with the process of strengthening the use of the English language in teaching and learning, at all levels of education and training.*

(Tanzania UR. Ministry of Education and Vocational Training (MoEVET), 2014, p. 37)

This recent policy change, which referenced the importance of Kiswahili as a regional language to support its use as an MOI in higher levels of education, was widely reported in the Tanzanian media but it remains to be seen whether it will be effectively implemented (Citi FM, 2015; Lugongo, 2015; Mjamba, 2015). One significant factor which may make its implementation less likely is the liberalization of access to English-medium primary education in Tanzania (Sakata et al., 2021). In the first decades of Tanzania's independence an authoritative style of government, combined with the population's poverty and low levels of literacy created conditions where widespread access to Kiswahili medium state education and restricted access to more advanced English medium education was a successful strategy for managing language acquisition because nearly all of the population saw benefit in acquiring literacy in both Kiswahili and English. From the end of the Twentieth Century onwards, whilst Tanzania remained a poor country, literacy rates rose, and a growing middle class increasingly saw English alone as the language of opportunity. Rather than accommodating this demand within the state education system, the Tanzanian government allowed the

development of a parallel, private, English-medium primary education system whose graduates could take the Tanzanian Primary School Leaving Examination, which includes a Kiswahili examination, and qualify for entry to state secondary schools. The development of this fee-paying English-medium primary school route effectively creates an econo-linguistic divide with richer families able to by-pass the state-building Kiswahili-medium primary school system (Shank Lauwo, 2020) (Qorro, 2013).

6.7.3   Violent transitions to independence and new official languages

Education systems, like many social institutions can be slow to change their policies as their characteristics both represent, and work to maintain, cultural capitals which are to the benefit of élite groups (Bourdieu, 1990). Although the majority of Purist and Pragmatic cases have used MOI policies to maintain the national linguistic markets established before independence, five countries – all of which experienced violent transitions to independence – have sought to change their official language identities as part of the process of creating a new independent national identity. The new governments of Indonesia, South Korea, Namibia, Timor Leste, and (to a lesser extent) Eritrea made legal changes to which languages had official status. They then used language-in-education policies to support the remaking of their linguistic markets by removing or reducing the use of languages associated with the pre-independence power in formal state-controlled domains; and to promote the acquisition and use of their new official language(s) so that its official status would not be merely symbolic (Kymlicka & Grin, 2003, p. 25) (Bourdieu & Wacquant, 1992, pp. 94–114).

 In all five countries the new national language was established as a symbol of independent national identity before independence was attained. In South Korea, the Korean language was reinstated as the sole MOI, reversing the imposition of Japanese during the colonial period (Federal Research Division: Library of Congress, 1992, pp. 111–115). In Indonesia, the colonial language, Dutch, was replaced by bahasa Indonesia, which had been chosen as a unifying language for the Indonesian independence movement in 1928.

The type of MOI policy used to promote the acquisition and use of the new national language depended upon existing patterns of language use and literacy in each country. In linguistically homogeneous Korea, where the Korean language has a long history of being used as a literary language in all formal

domains, a Purist MOI policy was used. In linguistically diverse Indonesia, where only a few community languages had traditions of being used as literary languages, Bahasa Indonesia had been deliberately chosen to provide a unifying national linguistic identity and so it was taught using a Pragmatic MOI policy, with community languages used as MOI for the first years of primary education.

The influence of circumstances both within and outside the country on these programmes to remake the national linguistic market is clearly seen in the changing MOI policies of Timor Leste, which was colonized first by Portugal and then by Indonesia (see Chapter 3). At independence Timor Leste adopted two official languages: the international language Portuguese and the lingua franca Tetum – both of which were used as languages of resistance to Indonesia's occupation of Timor Leste. English and bahasa Indonesia were given the status of working languages - used to facilitate communication between the government and The United Nations Transitional Authority for East Timor (UNTAET) which was responsible for coordinating the efforts of the international development community to rebuild state infrastructure after the violent and destructive withdrawal of Indonesia's forces. In Timor Leste's schools, however, the decision was made to transition rapidly to an all-Portuguese MOI policy – completely removing the pre-independence MOI, bahasa Indonesia, as an MOI but allowing it to be taught as a subject in secondary school. The other official language, Tetum, was to be taught as a compulsory subject (Shah, 2012; Timor Leste Ministry of Education & UNESCO, 2015, p. 5).

This Portuguese-language acquisition policy was supported by Portugal and Brazil, who provided teaching resources and teacher training, but its implementation ran into many practical difficulties. Although Portuguese had been used as the language of Timor Leste's exiled resistance movement, it was only the older members of the population, educated under the Portuguese administration, who could use it fluently. In addition, Timor Leste had very few trained teachers and school attendance and national literacy levels were low. In 2004, in an effort to improve the effectiveness of Timor Leste's primary schools, some use of the lingua franca, Tetum, was introduced as a transitional MOI in early primary school. The results of Timor Leste's 2006 national census (Table 6-14) showed that knowledge of Tetum was more widespread than of

Portuguese, but it was not universal. At least 13% of census respondents had no knowledge of either Tetum or Portuguese (Taylor-Leech, 2008, 2009).

Languages	number of respondents	proportion of population
Tetum only	192,692	26
All four official and working languages	143,684	19
Portuguese, Tetum and Indonesian	113,008	15
Portuguese and Tetum	12,522	2
Tetum and Indonesian	158,001	21
Tetum and English	963	<1
Indonesian and English	644	<1
None of these	96,703	13

Table 6-14 Proportion of respondents able to speak, read or write at least one of the official or working languages (n=741,530). Data from national census 2006, Timor Leste. Source, Taylor-Leech (2009)

In 2006, starting in the capital Dili, there was a breakdown in law and order which spread across Timor Leste and resulted in the government requesting the establishment of a UN peacekeeping mission. The UN Integrated Mission in East Timor (Unmit) remained in Timor Leste until 2012 (BBC, 2018a). During this period of state stabilisation, Timor-Leste's state-building MOI policy was further modified in an effort to improve educational attainment and increase levels of school attendance, particularly in rural communities – which had the lowest levels of knowledge of the two official languages. In 2008 the Basic Education Act introduced a dual-language MOI policy. Tetum became the MOI for the first three years of primary school, before all students transitioned to using Portuguese as the MOI for upper primary and secondary education. This change still did not lead to a marked improvement in educational attainment in rural areas. So, reflecting the fact that Timor Leste was developing its education policy in close consultation with the international educational development community in the EFA-era, from 2011 onwards pilot projects were carried out to investigate the effectiveness of using community languages as MOI. The findings from these pilot studies, which were published at the end of the period of time covered by this study, showed that using community languages improved school attendance and student performance, including acquisition of the official languages. However, it remains to be seen whether Timor Leste's government will support the wider

implementation of more MOI choice in early primary education, or reject it as hindering the achievement of their linguistic state-building goals (Caffery et al., 2014, 2016; Komision Nasional Edukasaun Timor Leste & UNICEF, 2011; National Education Commission, 2011; The World Bank Office Dili, 2013).

6.7.4 Disagreement over whether Pragmatic MOI policies help or hinder the acquisition of official languages

This analysis showed more movement between MOI policy types amongst the states which inherited a pre-independence tradition of using community languages as MOI in early primary school (HPRA=1) than for the traditionally Purist (HPUR=1) states. This movement can be attributed to two main sources. First, a difference in opinion over whether the use of Pragmatic MOI strategies facilitates or hinders the effective acquisition of the dominant language of the national linguistic market; and second, the use of language-in-education policies as political bargaining chips. Ghana's frequent changes of MOI policy illustrate both of these points (Bamgbose 1991: 115-117). After independence Ghana first used an all-English MOI policy. Following the start of one-party military rule in 1964, formal support for the use of community languages as MOI in early primary school was reinstated, in line with recommendations made by Ghana's 1966 *Education Review Committee* (Agbedor, 1994, p. 153). Since the restoration of multiparty democracy in 1992, Ghana's MOI policy for early primary has changed several times. In 2002, following elections won by the New Patriotic Party, an all-English MOI policy was introduced, with the justification that the previous, Pragmatic, policy of using community languages as the MOI of initial education was responsible for Ghana's students' poor performance in English examinations. This Purist all-English policy was then criticised in the Ghanaian media for increasing educational disadvantage within the country (Ansah, 2014). In 2007, following the recommendations of the *Anamuah-Mensah Education Reform Review Committee Report* of 2004, the use of community languages as MOI in the first three years of primary school was reintroduced (Owu-Ewie, 2006, pp. 154–155).

Kenya' s early MOI policies followed a similar trajectory to Ghana's, beginning with the recommendations of the 1964 *Ominde Report* which called for a transition to an all-English MOI as soon as possible. The recommendations of this report were never fully implemented, and community languages continued to

be used for teaching and learning, particularly in more rural areas where English was not commonly spoken in the community. Official support for the use of community languages as MOI in early primary school as a stepping-stone to learning the official language, English, was reinstated following the recommendations made in Kenya's 1976 *Gachathi Report* and Kenya has retained an officially Pragmatic MOI policy to the present day (Powell, 2002, p. 244; Trudell & Piper, 2014).

As with Ghana, in Kenya all of the MOI policy changes had the aim of supporting eventual acquisition of the dominant language, English. In common with other ex-British colonies, one of the motivations for retaining English as the dominant MOI of the Kenyan education system, despite its associations with colonialism, was the potential benefit to the state of having a workforce which was fluent in the dominant language of the international linguistic market. This motivation is seen in the supporting documentation for the 1977 school curriculum. In the primary school English syllabus the first aim given for teaching English in primary school is that students should achieve *"a pronunciation of international intelligibility".* And in the introduction to the document for teachers *"Teaching English in Kenya Secondary Schools"* the need for an English-speaking workforce to support Kenya's growing role as a service centre for regional and international organisations working across Eastern Africa is stated explicitly (Kanyoro, 1991, pp. 404–405). As in Tanzania, in the Twenty-first Century the advantages perceived as being linked to the acquisition of a strong competence in English has contributed to an increase in the number of Kenyan families choosing to send their children to low-fee private primary schools which use English, rather than community languages, as their MOI (Zuilkowski et al., 2018). This opting out of the use of community languages as MOI by better off families reinforces the image, established during the pre-independence era, of community languages being associated with lower-quality education (Roy-Campbell, 1992, p. 116) and contributes to the maintenance of English's status as the dominant language within Kenya's national linguistic market.

Looking beyond the wording of policy documents, to their implementation, provides additional evidence that increased international promotion of using community languages as MOI in early primary school in the EFA-era has affected the MOI policy choices of individual states. A closer look at the MOI policies of

Uganda and the Gambia, both classified as having Pragmatic MOI policies in every wave of analysis, shows that whilst their official written MOI policies have not changed, the actuality of government support for, and promotion of, the use of community languages as MOI in early primary school has increased since the 1990s.

In Uganda a review of the education system was commissioned just before independence. The report of the *Castle Commission* recommended that *"unless circumstances make it impossible, children should normally be taught in their own vernacular language in the early years of schooling"* and that English should be used as a common language to provide a *"unifying factor in a country where the peoples are of different race and language".* These recommendations were adopted by the Ugandan government in 1965 but never practically supported and early primary education tended, in practice, to be delivered through English (Namyalo & Nakayiza, 2015, p. 413; Uganda Education Commission, 1963, paras. 36–38). In 1989 *The Education Review Commission* of the Ugandan Ministry of Education, citing language policy recommendations from UNESCO and the OAU's Inter-African Bureau on Languages, again made the recommendation that community languages be the MOI for the first four years of primary school (Education Policy Review Commission, 1989, p. 32). These recommendations were taken up in 1992 in a government white paper on education (Ward et al., 2006, p. 412) but the curriculum reform which finally enacted these recommendations began in 2007 (Trudell, 2016, pp. 80–81).

Similarly, in the Gambia since independence the MOI policy for early primary school has been to begin by using local languages for teaching, introducing English as the MOI from the second year of primary school (Richmond, 1980, p. 417) but this policy of early-exit mother-tongue policy was generally ignored on the ground (Juffermans & McGlynn, 2010, p. 343). Between 1988 and 2003 the Gambian Ministry of Education developed and piloted the use of some teaching materials to support the use of community languages as MOI (Igboanusi, 2014, p. 562). This Pragmatic MOI strategy was adopted as national standard-practice in the Gambia's 2004 – 2015 Education Policy document, the aims of which were stated as being: *"synchronised with the education-related Millennium Development Goals (MDGs), Education for All (EFA) goals, the New Partnerships for African Development (NEPAD) education-related goals and the country's*

Poverty Reduction Strategy Paper (PRSP)." (Department of State for Education - Gambia, 2004, p. 8).

Both Uganda and the Gambia are poor states with low levels of literacy (POOR*litcur). It can be inferred that the renewed promotion of Pragmatic MOIs in their primary schools, supported by reference to international recommendations on education policy best practice is driven by a desire to attain the internationally-set goal of universal access to primary education. This revitalization of Pragmatic MOI policies in the EFA era is also seen in Indonesia, where since independence, all community languages have been permitted for use as MOI in early primary school before students transition to learning through the official language, bahasa Indonesia. In practice, it is only languages with a large number of speakers, such as Javanese and Sundanese, whose use as an MOI is adequately supported with government and commercially-produced resources – smaller languages are neglected (Musgrave, 2014). However in the second decade of the Twenty-first Century, the Indonesian Ministry of Education and Culture has made a concerted effort to promote the use of community languages (MTB-MLE) in marginalised regions such as Papua. Commenting that:

> *"While the challenges may be formidable and the initial costs of implementing MTB-MLE [mother tongue-based multilingual education] will be significant, there is compelling evidence to suggest that if there is sufficient political commitment and if MTB-MTE is implemented well, it is a wise investment which in the long run will secure many educational, social, political and developmental payoffs."* (ACDP Indonesia, 2014)

As with the introduction of MOI choice in the South of the Philippines, Indonesia's investment in MOI choice in early primary school is not only promoted as a strategy for making access to state education systems more equitable. It is also presented as contributing to state stability by improving the satisfaction of marginalised, and potentially volatile, communities with the state education system. This is an advantage to states of investing in MOI choice which has been increasingly promoted by the international education development community during the EFA-era (UNESCO, 2014). At the same time Indonesia has also been using its language-in-education policy to increase the acquisition of the high-status international language English, which has become seen in South-East Asia as increasingly necessary for facilitating both individual and national

economic opportunity (Kirkpatrick, 2012; Kirkpatrick & Liddicoat, 2017). I discuss this in Chapter 8.

6.8 Conclusion

The changes to primary school MOI policy and resultant movement between Purist and Pragmatic MOI strategies discussed in this chapter all had a common goal –to support a uniform secondary school MOI environment – where every student uses the same MOI – thus contributing to linguistic state-building. Within my case data I identified four significant MOI policy pathways: the "softening" of traditionally Purist MOI policies; Purist strategies which use "dual language" MOIs – teaching using both a national and an international language; oscillation between Purist and Pragmatic strategies linked to debate over whether Pragmatic MOI policies "help or hinder" the acquisition of international languages; and states which experienced "violent transitions" to independence using their MOI policies to create a new national linguistic identity.

It would be easy to assume that the choice between adopting a Purist or a Pragmatic MOI policy just involved deciding whether or not to support the use of under-developed community languages in schools, but this is not always the case. Some community languages, particularly those that have official status in other countries (kin-states), are considered a potential threat to the status of a country's official language if they are used for schooling as they offer an alternative educational route to accessing social and economic advantage and can open up access to opportunities in other countries. Following the same logic of minimising threats to the development of national languages from community languages which was seen in the countries with dual MOI policies, the use of community languages with associated kin-states can also be restricted. This is seen in Eritrea which, since independence from Ethiopia, has a strong Pragmatic MOI policy – using nine community languages as MOI in primary school grades 1-5 and English as the medium of secondary education (Asfaha, 2015). One of the community languages used in primary school is Arabic. Due to Eritrea's large Muslim population, Arabic was used as an MOI and language of administration in both the British and Italian colonial administrations, and as a language of resistance in the movement to gain independence from Ethiopia. Alongside

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English and Tigrinya, Arabic is one of the lingua franca of independent Eritrea and all three languages are taught as subjects in primary school (Bereketeab, 2010; Hailemariam et al., 1999). Whilst Arabic is the home language of only a small fraction of the population, because of its association with access to opportunity (there is a large Eritrean diaspora living in Arabophone countries) many parents would prefer for their children to attend Arabic-medium primary schools, rather than those that use their designated ethnic language. There are also parents who would prefer Tigrinya-medium education to schooling through one of the other, lower-status, community languages. Eritrea's authoritarian government justifies its close regulation of the language used in each community's primary school by saying the development of all vernacular languages is essential for national unity and for avoiding a split along religious (Arabic-Islam, Tigrinya-Christian) lines. However, access to Arabic-medium education is restricted more than access to Tigrinya-medium education is (Asfaha, 2015; Mohammad, 2016). This indicates that Arabic, which has a high status within the international linguistic market is perceived as more of a threat to Eritrea's management of language identities than Tigrinya, which has a relatively high status within Eritrea but not internationally. In the next chapter I explore the MOI policy trajectories of cases which inherited pre-independence MOI policies that allowed the use of several different high status languages as MOI in both primary and secondary education.

7 The Accommodating MOI strategy: an elaboration

The focus of this chapter is MOI policies which "accommodate" the use of more than one language as MOI, not just in primary school, but also in the high-status domain of secondary education. Consequently, it is not necessary to use the official language to complete secondary education. Using the coding strategy which I described in Chapter 5, I defined Accommodating MOI policies as ones where:

- **Accommodating (ACC):** Community languages (which often have a relatively high status within the international linguistic market) are used as MOI within both primary and secondary school. Or there is some choice in the MOI used for secondary schooling.

This choice of MOI is not limitless and is often restricted both in terms of the languages permitted to be used as MOI and the regions of the country in which MOI choice is supported. Often, the additional languages in Accommodating MOI policies are those used by established minority groups that have an associated external kin-state – meaning the language has official status in at least one other country.

In modern states, where literacy is a prerequisite for all but the most menial types of employment, the language(s) used as MOI for secondary education are usually the language(s) used in other high-status fields (Blommaert, 2005, pp. 76, 167). In a country with an Accommodating MOI policy, access to further education and formal employment is not solely dependent on acquiring and using the language-of-state as opportunities are available through other languages – either in the state itself, or in other countries. This situation results in a national linguistic market in which two or more languages are accepted (either as a result of legislation, or through established patterns of usage) for use in high-level fields, including education. In such a situation the dominant legal status of the official language may not be matched by its actual value within the national linguistic market, and this could lead to education through languages other than the language-of-state being preferred by parents for their children – thus weakening the status of the official language (Csergo, 2007).

In this chapter I explore why some states maintain Accommodating MOI policies, whilst others adopt policies which restrict the amount of MOI choice available at

the secondary school level. The majority of the incidences of Accommodating MOI policies occur in the newer post-1990 countries, so in this chapter I compare across the 1995, 2005 and 2015 waves to explore movement in MOI choice across these countries.

7.1 Common characteristics of "ever Accommodating" countries

The majority of cases that have used Accommodating MOI policies are the new Eurasian countries, formed after the break-up of the Soviet Union and its satellite states. Due to their late dates of independence and their well-developed, pre-independence education systems, at independence these all reported near-universal levels of literacy – suggesting that MOI policies before independence would be strongly linked to the structure of each country's linguistic market. These high levels of literacy also suggest that patterns of access to both primary and secondary education through different language paths would be strongly established. A post-independence linguistic state-building policy which entailed restrictions being made to the use of a particular language as MOI might be resisted by community groups which have previously benefitted from the opportunities associated with education through that language. So a new government would need to take into account, not only the reactions of the section of the population directly affected by this (who have an expectation of being able to use their community language to access education), but also the reactions of that community group's kin-state before making such restrictions. This differs from the restriction of MOI choice when a country moves from a Pragmatic to a Purist-type MOI policy as, in general, though those excluded languages may be used in more than one country, they rarely hold official status in those other countries. So, whilst in all countries language policies may be influenced by the relative values given to languages within the international linguistic market and internationally promoted models of language-in-education best-practice, there are additional pressures when these language policies involve language groups with kin-states (Blommaert, 2005, pp. 218–219).

I found no relationship between the overall level of linguistic diversity in a country and the use of Accommodating MOI policies. Rather, as I will show, the use and modification of Accommodating MOI policies in all of the cases is better

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understood by exploring the current and historical politico-economic relationships associated with the different languages used in each country's education system and how linguistic state-building strategies are devised to work within these contexts.

Key to Table 7-1

Table 7-1 below shows all of the countries which have *ever* used an Accommodating MOI policy (coded as ACC).

It shows their independence dates, a measure of linguistic diversity, the literacy rate at independence, and their population in 2015.

The three right-hand columns in the table summarise the amount of MOI choice allowed by each of these country's education policy in 1995, 2005 and 2015.

MOI choice coding [p,s] = [choice in primary school, choice in secondary school]

* countries with Opportunistic MOI strategies (see Chapter 9)

Full MOI policy descriptions are given in Chapter 5. The table shows that there has been movement in all directions – with countries that increase, decrease and maintain the choice allowed by their MOI policies.

country	Independence date	Index of linguistic fractionalization	literacy rate at independence	population in 2015 (millions)	MOI policy choice		
					1995	2005	2015
Cameroon CMR	1961	0.975	20	22.8	[4,2]	[4,2]	[4,2]
Croatia HRV	1990	0.104	99	4.2	[4,2]	[4,2]	[4,2]
Czech Republic CZE*	1993	0.072	99	10.5	[4,2]	[4,2]	[4,2]
Kazakhstan KAZ*	1991	0.514	98	17.5	[4.2]	[4.2]	[4.2]
Kyrgyzstan, KGZ	1991	0.459	98	6.0	[4.2]	[4.2]	[4,2]
Lithuania, LTU*	1991	0.416	99	2.9	[4.2]	[4.2]	[4,2]
New Zealand NZL	1947	0.291	98.5	4.6	[4,1]	[4,1]	[4,2]
Slovenia SVN	1991	0.166	100	2.0	[4.2]	[4.2]	[4,2]
North Macedonia MKD	1991	0.495	93	2.1	[4.2]	[4.2]	[4,2]
Ukraine UKR	1991	0.497	99	45.2	[4.2]	[4.2]	[4,2]
Belarus BLR	1991	0.382	98	9.5	[4,2]	[4,2]	[4,1]
Estonia EST	1991	0.471	100	1.3	[4,2]	[4,2]	[4,1]
Indonesia IDN*	1945	0.816	6.75	258	[3,1]	[3,1]	[3,1]
Latvia LVA	1991	0.534	100	2.0	[3,2]	[3,1]	[3,1]
Slovakia SVK*	1993	0.246	99	5.4	[4,1]	[4,1]	[4,1]
Tajikistan TJK	1991	0.276	98	8.5	[4,2]	[4,1]	[4,1]
Rwanda RWA*	1961	0.09	17	11.6	[0,0]	[0,2]	[0,0]
Turkmenistan TKM	1991	0.457	98	5.6	[4,1]	[0,0]	[0,0]
Singapore SGP	1965	0.773	62	5.5	[0,0]	[0,0]	[0.0]

Table 7-1 MOI policy trajectories of "ever Accommodating" cases.

7.1.1 Truth-table to identify common characteristics of "ever Accommodating" states

To explore how the at-independence conditions of countries which have *ever* used Accommodating MOI policies differ from those which have never offered MOI choice within their secondary schools. I constructed a truth-table (Table 7-2) using the following four case characteristics:

- **HACC:** there is a pre-independence tradition of more than one language being used as the MOI of secondary education. Suggesting

that after independence the needs and expectations of more than one language community would need to be managed when planning any change to secondary school MOI policy.

- **MOI_CHANGE:** at, or in the period shortly before independence the official language of the country, and the dominant MOI of the education system, was changed. After independence, MOI policy changes may be made to strengthen the status of the new official language.

- **MIXED:** the state experienced more than one pre-independence administration during the Twentieth Century. This could affect a country's at-independence linguistic market either by (when the administrations are sequential) causing a change in MOI policy, so there is less time for a dominant MOI to be established, or (when different parts of the country have had different pre-independence histories) leading to the inheritance of two or more different MOI traditions.

- **INTERNATIONAL MOI:** the dominant MOI is a language with high status within the international linguistic market. If this is not the case, other languages which are more widely used in regional or international fields may also have been used as MOI during the pre-independence era. After independence, the continued use of such languages in schools may be perceived as threatening the status of the official MOI and this could lead to more restrictive MOI policies being introduced.

These four case characteristics produced a truth-table with sixteen rows, nine of which contained cases, and the "ever Accommodating" cases are spread across seven of these. None of the conditions are necessary for introducing an Accommodating MOI policy. There being a precedence for secondary schooling being available through more than one language before independence (HACC=1) is a near-sufficient condition for adopting an Accommodating MOI policy (CovS=0.94). The only deviant case being Namibia, which abandoned its apartheid-era MOI policy before independence.

The majority of the "ever Accommodating" cases are in rows #6 and #8. These are the new Eurasian states which share many similar characteristics. They all experienced changes of rule during the Twentieth Century before becoming

independent (MIXED=1), which contributed to the use of many languages in high status domains. So at independence they had to manage the inheritance of a pre-independence tradition of using more than one language as MOI in secondary education (HACC=1). These states also use a non-international titular language (int_moi=0) as their official language and MOI (in some an additional, international language is used as a co-official language), For the cases in row #6 (formerly part of Yugoslavia or Czechoslovakia) their new official language was the official, dominant, MOI of each state's education system before independence (moi_change=0), though this language may not have been the politically dominant language of the federation of which they were a part. In the countries in row #8 (formerly part of the USSR) the official MOI was changed just before independence (MOI_CHANGE=1) with each country adopting a new language law which made their titular language the official state language. Together, these two rows imply that the combination of characteristics *HACC*MIXED*int_moi* is sufficient for the outcome "ever Accommodating" and all of these states did have Accommodating MOI policies at independence. In this chapter I focus on these cases, exploring why the MOI policies of some of these states became much less Accommodating over time.

There are five other cases which I classified as "ever Accommodating". Three (New Zealand, Rwanda, and Indonesia) adopted novel Accommodating MOI policies in the late-Twentieth and early-Twenty-first Centuries – I discuss these later. The other two (Cameroon and Singapore) had Accommodating MOI policies at independence but, unlike the Eurasian Accommodating cases, used international languages as their dominant MOI. By 1987 Singapore had abandoned its Accommodating MOI policy and adopted a unique Purist language-in-education strategy. This used English as its sole MOI (justified as being the language of international social and economic opportunity) but, alongside this, implemented a compulsory "mother tongue" programme to support the inculcation of "Asian values" (Wee, 2003).

row #	HACC	MOI_CHA	MIXED	INT_MOI	never Accommodating	ever Accommodating
#1	0	0	0	1	BEN,BFA,BWA,CIV, GNQ,GAB,GMB,JAM, KEN,LSO,MUS,PHL, SEN,TTO,UGA,ZMB	**NZL**
#2	0	0	1	1	ERI,GHA,TGO,TZA	**RWA**
#3	0	1	0	0		**IDN**
#4	0	1	1	0	KOR	
#5	0	1	1	1	TLS	**CMR**
#6	1	0	1	0		**HRV,SVK,SVN,MKD, CZE**
#7	1	1	0	1		**SGP**
#8	1	1	1	0		**BLR,EST,KAZ,KGZ, LVA,LTU,TJK,TKM,UKR**
#9	1	1	1	1	NAM	

Table 7-2 Truth-table to explore differences between "ever Accommodating" and "never accommodating" states.

Unlike Singapore, Cameroon has retained its Accommodating MOI policy since Independence. Like the Eurasian states, independent Cameroon had a mixed pre-independence history (MIXED=1), but of a very particular type. Cameroon was a German colony at the beginning of the Twentieth Century. After WW1 it was divided into two protectorates, one administered by France and the other, smaller part administered by Britain. The territory of modern Cameroon formed in 1961 when part of the British protectorate was "spliced" onto the French protectorate, first as a federation and then, in 1972, as a unitary state, which used French and English as its co-official languages (Anchimbe, 2013; Constable, 1974; Fonlon, 1969; Kouega, 2007). The situation in modern Cameroon, where different regions have different colonial histories, is different to the other case in

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row #5, Timor Leste and the other "mixed" cases in row #2. In those countries the whole of the modern independent state had a common history of colonial administration change, and these "layers" of administration created a uniform MOI policy across the entire country pre-independence. The only exception to this is Ghana, which is technically a "spliced" state like Cameroon but was formed from the union of two British-administered territories, Gold Coast and British Togoland, so did not inherit two different MOI traditions at independence.

Cameroon's "spliced" colonial history resulted in an education system in which either French or English may be used as the MOI for all levels of education. Whilst the Cameroonian government has implemented a range of educational initiatives to foster French-English bilingualism in its students, most students only use the dominant language of their region as their MOI and learn the other official language as a compulsory subject – the French and English medium schools even have different external examinations (Nana, 2013). This situation gives modern-day Cameroon an MOI policy landscape which resembles the federal MOI polices of Yugoslavia and Czechoslovakia – with each region using a different one of the country's official languages as the dominant MOI of its regional education system. Although no longer a political federation, Cameroon's MOI policy has retained its federal quality. In consequence, I feel that a detailed exploration of its MOI policy changes, in particular efforts to introduce the use of community languages as MOI in primary school (Alidou, 2011; Kouega, 2007), would be better done by comparing Cameroon to other federal states rather than to the unitary states in this study – so I will not discuss the situation in Cameroon any further in this chapter.

7.2 Exploring the management of inherited Accommodating MOI policies by the new Eurasian states

The success of the decision by Singapore's government in the 1980s to abandon its four-language Accommodating MOI policy in favour of an all English MOI policy has been attributed to two factors – the authoritarian nature of the administration, and that the changes to language use went in the direction of patterns of language status in both the national and the international linguistic market. The wider range of opportunities available to English-educated students had already led to highly reduced enrolment in Tamil- and Malay-medium streams

and some reduction in enrolment in the higher-status Mandarin-medium stream. Whilst this decision to discontinue Mandarin-medium state-education was unpopular with members of communities which had traditionally benefitted from investing in the acquisition of literacy in Chinese-languages, the authoritarian government of the time did not allow any criticism of its overall language-in-education policy (Gopinathan, 2013).

In contrast, at the end of the Twentieth Century many of the new Eurasian states were using their language-in-education policies to support the implementation of new patterns of language status and usage in formal domains which went against both their inherited national linguistic market (established through pre-independence MOI policies) and also the wider international linguistic market, by making a previously marginalised, non-international language the country's official language. To do this policy makers not only needed to make policies which altered the relative official status of particular target languages, they also needed to develop strategies to ensure that individual patterns of language usage in formal domains also changed. School language-in-education policies can support such aims by making demonstrating knowledge of the new official language a necessary part of completing primary and secondary schooling. The intention of such policies is to alter the types of linguistic capitals which are necessary for success within the country's educational field (Blommaert, 2005, pp. 219–220).

This linguistic state-building activity was partly driven by the "one-nation, one-language" meme which presents a shared formal linguistic identity as being necessary for the development of a strong and cohesive sense of national identity. But it also had a much-less abstract ambition, to support the movement of political and economic power within the state from groups associated with the old colonial regime, to those associated with the new political regime (Janmaat, 2008). A consequence of the successful implementation of a change to the dominant MOI of a state's education system is a reduction in the status and utility of previously dominant languages – though, not necessarily, their total removal from the education system. So it might be presumed that such changes may be resisted by community groups which had previously benefitted from social and economic opportunities associated with education through these high status languages (Tollefson, 2013, p. 3). On the other hand, if there is seen to be significant benefits to being educated through the new official language, then policy change may be better accepted.

I use this concept of the management of resistance to MOI change by policy makers to create a truth-table to unpack why by 2015 some of the new Eurasian states' MOI policies have become more restrictive, allowing less MOI choice in primary and secondary education, whilst others have not. To do this, I created a new outcome:

- **VACC:** "very Accommodating" MOI policies (secondary choice = 2, primary choice = 0, 1, 2, 3 or 4)

Since independence, cases coded as "very Accommodating" (VACC=1) have maintained (or even added to) the range of languages supported for use as MOI in secondary education and it is possible to complete a full course of secondary education in a non-official language (though it may be compulsory to learn the official language as a subject). In contrast, in "not very Accommodating" (vacc=0) cases, the official language must be used by all students as the MOI of secondary education for at least some subjects.

Drawing on patterns that emerged from my analysis, I created a truth-table (Table 7-3) using five characteristics representing the influence of factors from outside as well as inside states that may account for the pattern of change to the Accommodating MOI policies of the new Eurasian states by 2015.

7.2.1 Case characteristics: LANG, RICH, EU, CDEM, EAEU

- **LANG**: The official language is well established within the national linguistic market (according to census data more than 80% of the population report that the official, titular, language is their first language)

This characteristic represents the relative strength of the official language within the linguistic market. I initially looked to identify the presence within a country's population of a "linguistic threat", which I defined as "an established minority group which is associated with the use of a high status administrative language other than the country's official language(s)". The presence of such a group would account for why Accommodating MOI policies had been present in the pre-independence school system (HACC=1) and it could also contribute to

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explanations of why certain countries have restricted the amount of choice in their secondary school MOI policies since independence.

Whilst I still consider the concept of "linguistic threat" is important, it was very difficult to operationalize it as a meaningful binary characteristic for several reasons. First, as discussed in the previous chapter there is a limited amount of good quality, up to date, comparative data on language use. For comparing Accommodating MOI policies the lack of consistent data on multilingualism and the conflating of language use with ethnic group is particularly inconvenient. Second, there is no consistent pattern between the relative number of speakers of the official language and other languages and the maintenance or restriction of Accommodating MOI policies. Third, some countries, such as Kazakhstan and Belarus have more than one official language, so using either official language as MOI could be construed as supporting linguistic state-building.

Taking all this into account, I decided that the most reliable way to represent language use in formal domains for these cases was to identify countries where census data shows that the official titular language is used as a first language by a large majority of the population. I use additional data available on language use to support my discussion of case groupings within the truth-table rows.

- **RICH:** In 2015 the country was classified by the World Bank as being a "high income country" (per capita GNI > 12,735 USD) (World Bank, 2018a)

This characteristic represents the influence that a well-developed economy may have on a country's approach to promoting the use of its official language as the dominant MOI of its education system (Grin, 2006). Putting aside the importance attached to links between language and identity, might parents of children in minority language streams be more willing to accept (or even actively seek out) the use of the language-of-state as the MOI for all or part of their child's education, if it is seen as leading to access of the best social and economic opportunities? If this is the case, then there may be less need to legislate for the compulsory use of the language-of-state as MOI, as the structure of the linguistic market would incline parents towards voluntarily choosing the official language as the MOI for their child's education.

- **EU:** The country is a member of the European Union (EU) or an official candidate for membership to the EU

The European Union is considered to have a very robust legal framework for the protection and promotion of the use of minority languages. On paper, Article 14 of the Council of Europe's Framework Convention for the Protection of National Minorities, 1 February 1995, (1995) and Article 8 of its European Charter for Regional or Minority Languages (1992) (both of which entered into force in 1998) provide strong legal support for education through the medium of minority languages (de Varennes, 2008, p. 127; McGroarty, 2013, p. 39). It is European policy to promote a positive attitude towards multilingualism, and compliance with the conditionalities attached to qualifying for EU membership in the late 1990s are held to have had some effect in liberalising policies towards minority groups in new member states (Gelazis, 2004) (Agarin & Regelmann, 2012) (Duina & Miani, 2015).

However, the provisions of both of these pieces of legislation have been criticised as being easily circumvented by the state's which ratify them (de Varennes, 2008, p. 133; Skutnabb-Kangas, 2008, p. 110). It is interesting to note that both contain limiting clauses which seek to negate the links often presumed between formal recognition of a language and demands for independent statehood (Kymlicka & Grin, 2003, p. 14). Article 14 of the 1995 Framework Convention for the Protection of National Minorities states that provision of education in a minority language "*shall be implemented without prejudice to the learning of the official language or the teaching of this language.*" and Article 5 of the 1992 European Charter for Regional or Minority Languages declares: *"Nothing in this Charter may be interpreted as implying any right to engage in any activity or perform any action in contravention of the purposes of the Charter of the United Nations or other obligations under international law, including the principle of the sovereignty and territorial integrity of States".*

The new EU member states of the Twenty-first Century were strongly encouraged to ratify these two pieces of legislation, though doing so was not a compulsory part of the EU accession criteria (Kacarska, 2012; Schulze, 2010). Latvia, Lithuania, Estonia, Slovenia, Slovakia and the Czech Republic joined the EU in 2004 and Croatia joined in 2013. North Macedonia has been an official candidate

since 2004 (with formal negotiations beginning in 2000) and Ukraine has been an official candidate since 2022 (with formal negotiations beginning in 2008). All of the countries which I have coded as EU=1 have signed and ratified the Framework Convention for the Protection of National Minorities. The Czech Republic, Croatia, Slovakia, Slovenia and Ukraine have signed and ratified the European Charter for Regional or Minority Languages and North Macedonia has signed it.

- **CDEM:** In 2015, Freedom House's "Freedom in the World" report rates the country as "partly free" or "free"

As I discussed in the previous chapter, links have been made between the presence of authoritarian regimes in African states and the successful introduction of the use of non-European languages as national languages (A. Mazrui, 1996, pp. 107–109), so here I explore whether governments which are more accountable to their electorate take a different approach to managing the use of language choice within their education systems than more authoritarian regimes do. Freedom House's annual "Freedom in the World" report rates states according to the levels of political rights and civil liberties which their citizens enjoy (Freedom House, 2021). I coded cases as CDEM=1 if, in 2015 their regimes were classified as "free" or "partly free". Given the conditions for EU membership, all cases coded as EU=1, are also coded as CDEM=1.

- **EAEU:** Member, candidate, or observer of the Eurasian Economic Union (Russian influence)

I used membership to the Eurasian Economic Union (until 2014, known as the Eurasian Economic Community) to represent the influence that a commitment to maintaining economic and diplomatic relationships with the Russian Federation may have on the treatment of the use of Russian as an MOI within the education systems of the post-Soviet states. The EAEU is a transnational economic organisation that aims to develop a customs union and common economic space. Russia, Belarus, Kazakhstan, Tajikistan, and Kyrgyzstan are members and Ukraine has observer status. (Yesevi, 2014). Ukraine is also an official candidate for membership to the EU and since independence has been politically divided over whether it would be more beneficial to pursue closer economic ties with

Russia or Europe. In 2009 a customs union was established between Russia, Belarus and Kazakhstan. A major commodity traded within this union is fuel, with Belarus being dependent upon Russia for nearly all of its oil and gas. In contrast, although Kazakhstan is not rated as a high income country by the World Bank, it is a major international supplier of hydrocarbons in its own right, meaning that it is less politically dependent upon Russia than Belarus , which gives it leverage when dealing with Russia and other countries (BBC, 2019) (Heller, 2019; Yesevi, 2014).

For this analysis, in 2015 membership to EAEU=1 is not the perfect inverse of membership to EU=1 as Ukraine had both observer status with the EAEU and was also involved in formal negotiations to join the EU.

	LANG	RICH	EU	CDEM	EAEU	still v.accom (VACC=1)	less accom (vacc=0)
#1	1	1	1	1	0	SVN, HRV, CZE, LTU	
#2	1	0	0	0	1		TJK [4,1]
#3	0	1	1	1	0		EST [4,1], LVA [3,1] SVK [4,1]
#4	0	0	1	1	0	MKD	
#5	0	0	1	1	1	UKR	
#6	0	0	0	1	1	KGZ	
#7	0	0	0	0	0		TKM [0,0]
#8	0	0	0	0	1	KAZ	BLR *[4,1]*

Table 7-3 Truth-table for the outcome "very Accommodating" (VACC) in 2015

The 14 cases in this analysis cover 8 of the 32 combinations of cases characteristics possible with this truth-table. Four rows (#1, #4, #5, #6) are sufficient for the outcome VACC = 1.

For this solution, consistency = 1, coverage = 0.875

(Kazakhstan is not covered)

The conservative solution for this truth-table is:

LANG*RICH*EU*CDEM*eaeu +   SVN,HRV,CZE,LTU

lang*rich*CDEM*EAEU +   UKR,KGZ

lang*rich*EU*CDEM -> VACC   MKD,UKR

I now discuss the characteristics of the "very Accommodating" cases covered by this Boolean solution and contrast them with the properties of states which have restricted their MOI policies in secondary school.

7.3 Truth-table analysis

7.3.1 Rich, democratic European countries: Lithuania, Estonia, Slovenia

Rows #1 and #3 both contain high income, democratic countries, that are members of the EU. The difference between them being that the countries in row #1 (Slovenia, Croatia, Czech Republic and Lithuania), which have retained very Accommodating MOI policies, are coded as LANG=1, whilst those in row #3 (Estonia, Latvia and Slovakia) are coded as LANG=0. Suggesting that, in these small countries, full choice of MOI in secondary school will only be retained if the official, titular language is considered to be firmly established as the dominant language of the national linguistic market. This difference can be seen by comparing two of the Baltic states – Lithuania and Estonia.

During the Soviet-era asymmetric multilingualism was common in the Baltic states. Though speakers of the titular languages could access schooling and public services through their own language, they needed to learn Russian if they wanted to increase their access to social and economic opportunities, both in their own state and in the USSR as a whole. In contrast, native Russian speakers resident in the Baltic states could use Russian without restriction in all areas of public life, so had little incentive to learn the titular language of the state in which they lived (E. G. Lewis, 1972, pp. 209–214). The post-independence language polices of the Baltic states are designed to raise the status of their titular languages by making competency in them a requirement for employment and citizenship and also ensuring that all students use them as MOI for at least part of their school career. These policies have the aim of restructuring each state's linguistic market by protecting its titular language from competition from the internationally dominant language, Russian (Vihalemm & Hogan-Brun, 2013a).

When the Baltic states were part of the USSR the composition of their populations changed dramatically, which affected their linguistic markets. Many of the Baltic people were transported to Siberia and, as part of a deliberate process of Russification, ethnic Russians moved to the Baltic states to work in industry and military installations (Coulby, 1997). Lithuania was least affected by these changes. The proportion of ethnic Lithuanians in its population was 80% in 1923 and 81% in 1993. In contrast, in Estonia the proportion of ethnic Estonians in the population dropped from 88% in 1934 to 62% in 1989 (Solska, 2011). At independence both countries (Lithuania in 1990, and Estonia in 1995) adopted language laws which replaced Russian with the country's titular language as the official language and dominant MOI of the education system and also re-introduced the right to use other community languages as MOI (Vihalemm & Hogan-Brun, 2013b; Solska, 2011). The differences in the implementation strategies for these policies can be understood by considering the linguistic markets of the two countries.

In Lithuania, the general population census of 2011 recorded that 84.2% of residents were Lithuanians, 6.6% were Poles and 5.8% were Russians. It was estimated that 82% of the population spoke the official language, Lithuanian, at home and 8% used Russian, with a further 7% using Polish (European Commission, n.d.). In contrast, in Estonia, according to its 2011 census, only 68.7% of the population identified as ethnic Estonians and 68.5% claimed that their first language was Estonian. 24.8% of the population identified as ethnic Russian and 29.6% of the population reported that their first language was Russian. At independence the relatively weak position of the Estonian language within the Estonian linguistic market was illustrated by the languages used for teaching and learning in schools. In 1993, of the 215,000 primary and secondary school students in Estonia, 142,000 were studying in Estonian-medium schools and 70,000 in Russian-medium schools, with the rest studying through other minority languages – so nearly a third of all students were learning through a language which was not the language-of-state (Iwaskiw, 1996, pp. 4, 33; Central Intelligence Agency (CIA), 2017).

This difference in the proportion of speakers of the official language in each country accounts for the different legislative approaches which Estonia and Lithuania have taken to issues relating to citizenship and language use.

Lithuania's 1989 citizenship law gave citizenship to all people who were permanent residents at independence, including ethnic Russians. After independence the Lithuanian language became a compulsory subject for all students, but no legislation was put in place to limit the use of other languages as MOI in secondary school and Lithuanian universities provided training and qualifications for teachers at minority MOI schools. In 2001 the Ministry of Education began an opt-in bilingual education project to provide support for non-Lithuanian MOI schools to transition to using a bilingual Lithuanian+minority MOI and the 2002 education guidelines for national minorities encouraged, but did not enforce, the teaching of some subjects in Lithuanian. In the 2006-07 academic year there were 1,240 Lithuanian MOI schools and 106 using other MOI (mostly Russian and Polish). 34 of the minority MOI schools used Lithuanian for some teaching. Research by Hogan-Brun into attitudes towards language use in Lithuania suggests that this voluntary approach to using the state language as MOI has been successful because of Lithuania's strong economy. Parents from minority groups feel that there is a potential economic advantage to their children learning Lithuanian. But Hogan-Brun also points out that the Lithuanian government has supported this transition by providing easy access to language training for all members of society (T. Bulajeva & Hogan-Brun, 2008; Hogan-Brun & Ramonienė, 2003; Hogan-Brun & Ramoniene, 2005). The 2011 Education Law (Article 30) continued this voluntary approach to the use of Lithuanian as an MOI. It confirmed the right for national minority languages to be used as MOI but also gave the right for all children to be taught in the state language if their parents requested it. (European Commission, n.d.; Republic of Lithuania. Law Amending the Law on Education, 2011).

In contrast to Lithuania, Estonia adopted a citizenship policy in which only citizens of pre-Soviet Estonia and their descendants were automatically awarded citizenship. Other Estonian residents had to go through a naturalization process, meaning that, for the first years of independence ethnic Russians were effectively excluded from participating in political decision making, including the nature of language-in-education policies (Vihalemm & Hogan-Brun, 2013b) (Cianetti, 2014) (Duina & Miani, 2015). Knowledge and use of the new language-of-state became a condition for citizenship and for employment in certain areas of the labour market (Vihalemm & Hogan-Brun, 2013b). In 1992 Estonia's Law on

Education established Estonian as the dominant language of the education system and a compulsory subject for all students. Whilst permitting other languages to be used as MOI, all Russian-medium schools were required to use Estonian as the MOI for more than half of their teaching, and all upper-secondary schools were required to transition to using all-Estonian MOI by 2000 (Berg & van Meurs, 2002, p. 58). Estonia's 1992 Law on Education (Hogan-Brun et al., 2008, pp. 557–558). These measures indicated the strong role given to the Estonian language in creating a new independent national identity for Estonia, including an ambition for Estonian to replace Russian as the language of inter-ethnic communication – reversing the USSR's policy of confining the use of Estonian to the ethnic Estonian population only (Ministry of Education and Research. Estonian Language Council, 2004) (Vihalemm & Hogan-Brun, 2013a)

In 1995 when Estonia applied to join the European Union, one of the conditions for qualifying for membership was to address issues relating to citizenship and statelessness for its minority ethnic groups and, indirectly, its policies around the use of the Estonian language in public domains, including education (Agarin & Regelmann, 2012; Ozolins, 2003). These conditions are considered to have resulted in a liberalization of all of Estonia's policies towards minority groups (Solska, 2011) (Schulze, 2017). In 1998 it was announced that Russian-medium education would be funded in perpetuity and the requirement for all upper secondary education to become Estonian-medium was postponed and softened – becoming a requirement to use Estonian for 60% of all teaching (Hogan-Brun et al., 2008, p. 539) (Open Society Institute, 2002, pp. 192–244; Stevick, 2015b, p. 101). Compliance with EU standards modified Estonia's approach to replacing Russian with Estonian as the dominant language of its education system but did not eliminate it. In 2007 it was announced that all Russian-medium upper secondary schools would be required to transition to using 60% Estonian MOI by 2011 and in 2004 Estonian-medium immersion classes began to be offered at all levels of schooling for students who did not speak Estonian as their first language. (Stevick, 2015a) (Hogan-Brun et al., 2008, pp. 557–558) (Khavenson & Carnoy, 2016, p. 184) . However, there is some evidence that Estonia's strong economy has also been an incentive for some traditionally non-Estonian speaking minority groups to shift towards choosing Estonian MOI education for their children (Lindemann & Saar, 2012).,

Although having a large majority of the population using a state's official language as their first language does seem to be associated with maintaining greater MOI choice, the 80% cut-off for the characteristic "LANG" should not be viewed as a fixed point at which the MOI policy decision-making of a state will change, as the composition of the minority language community will also affect the MOI policy decision-making process. This can be seen in Slovakia, where it is estimated that 78.6% of the population use the official language Slovak as their first language, a proportion which is comparable to that of Lithuanian speakers in Lithuania. However, unlike Lithuania, since 1995 Slovakia has implemented policies to restrict the use of languages other than Slovakia in all state-controlled domains – including education. These policies have been particularly targeted at the 9.4% of the population which use Hungarian – the language of the pre-WW1 colonial power (Škrobák, 2009b).

The majority of ethnic Hungarians live in municipalities along the Southern Slovak-Hungary border, rather than being distributed evenly across the country – creating a distinct Hungarian-speaking region of Slovakia. In the 1994-95 school year, separate Hungarian schools composed 90 percent of all minority schools, and minority sections in mixed schools, in Slovakia (Csergo, 2007). According to the 2011 census, 10% of the population did not use the Slovak language in public life. These factors all indicate that the Slovak language is not the undisputed dominant language of the national linguistic market (Langman, 2002; Vass, 2015).

Slovakia's 1995 state language law which proscribed the use of any language other than Slovakian in formal state-regulated domains, was seen as deliberately targeting the distinct separate identity of the country's Hungarian community. As part of Slovakia's policy to promote the use of the official language, all Hungarian-medium schools were required to switch to a bilingual Slovak+Hungarian MOI and to carry out all of their administration, including the production of school leaving certificates, in the Slovak language (Csergo, 2007). Commentators describe the policy as being driven by an ideology that made a direct link between national identity and language and saw the use of non-state languages in formal domains as a threat to state-building (Agarin & Regelmann, 2012; Langman, 2002; Vass, 2015).

Independent Slovakia's policy of promoting the use of Slovak in education and restricting the status and utility of all minority languages (not just Hungarian) in

formal domains is an extension of Czechoslovakia-era state-building language policies from the late Twentieth Century. However, rather than being focused on school-level MOI, the policies at that time controlled access to tertiary education by only conducting university admission examinations in the dual official languages, Czech or Slovak and allowing Hungarian MOI to only be used in tertiary education for teacher training courses (Csergo, 2007; Langman, 2002).

The strictness with which the 1995 policy of using only the Slovak language in formal domains was implemented varied depending on the political climate but remained in place until 2009, when the new state language law allowed for some use of minority languages (written and spoken) in public domains (Højgaard Nielsen, 2021; Vass, 2015). Pressure to relax the implementation of the 1995 policy came from outside as well as within the country, with two significant forces being the need to maintain cordial diplomatic relations with the kin-state, Hungary, and the desire of Slovakia to join the EU – with negotiations for this beginning in February 2000 (European Parliament, 2000; Vass, 2015).

Although the ethnic Hungarians (unlike the ethnic Russians in Estonia) were not disenfranchised at independence, the strictness of the 1995 State Language Law delayed the start of Slovakia's accession negotiations to join the EU and the 1999 Minority Language Law (Act No. 184/1999), which gave protection to the use of minority languages in certain circumstances (including, to an extent, in education), was a necessary part of complying with the European Commission's demands that Slovakia align its minority policies with EU ideals as part of the process of becoming a member of the EU. There was also pressure from the minority group's kin-state, Hungary, to restore pre-independence patterns of allowing the use of minority languages in state-controlled domains (Agarin & Regelmann, 2012; Vass, 2015). For MOI policy there was little change and the "alternative education" model of converting Hungarian-medium schools to bilingual Slovak+Hungarian MOI schools continued to be actively pursued. However, some additional accommodation was made for using or teaching the languages of disadvantaged minority groups, particularly Roma within schools, but not as MOI (Csergo, 2007; Škrobák, 2009b).

Although all of the cases in row #1 have retained MOI policies where it is possible to complete a full course of primary and secondary education using a language other than the official language as MOI, this does not mean that all community

languages may be used as MOI. Controlling which languages may be used as alternative MOI, and in which areas of the country, is another strategy for linguistic state-building. This is seen in independent Slovenia's continuation of the Yugoslav-era policy of supporting the use of Hungarian and Italian, in addition to the official language, Slovene, as MOI in state-schools. Multilingual education (which includes compulsory lessons in the minority language for Slovene speakers, and in Slovene for Hungarian and Italian speakers) is restricted to regions where the languages are considered indigenous – Prekmurje for Hungarian, and Slovene Istria for Italian. In all other regions Slovene is the sole MOI – which is a change from the pre-independence era when other Yugoslav languages could be used as MOI and Serbo-Croat (the dominant language of Yugoslavia) was taught as a compulsory subject. While the 2007 Elementary School Act gives the right for all children to learn their mother tongue or a community language as a subject in primary school – it does not allow any additional languages to be used as MOI (Bešter & Medvešek, 2015; Republic of Slovenia. Ministry of Education and Sport, 2008; Tollefson, 1997). By giving controlled access to education through Hungarian and Italian, but restricting the use of other regional languages, Slovenia's MOI policy contributes to linguistic state-building by maintaining good relationships with these established minority groups and their kin-states (Brubaker, 1995; Waterbury, 2020), but restricting the use of other regional languages which have previously threatened the status of the Slovene language.

7.3.2 Less stable countries seeking to join the EU: Ukraine, North Macedonia

Outside of row #1 there are four other countries (North Macedonia, Ukraine, Kazakhstan, and Kyrgyzstan) which have retained a "very Accommodating" approach to their MOI policy until 2015. Unlike the row #1 cases, their retention of full choice over the MOI to be used in secondary education cannot be explained by them being high income countries where the official, titular language has a strong position within the country's linguistic market.

The solution term *lang*rich*EU*CDEM* (rows #4 and #5) covers North Macedonia and Ukraine and the term *lang*rich*CDEM*EAEU* (rows #6 and #5) covers Kyrgyzstan and Ukraine. Kazakhstan is not covered by any solution term because it shares a row with the negative case, Belarus. In this section I compare the

retention of a very Accommodating MOI policy by the two EU candidate countries, North Macedonia (formerly part of Yugoslavia) and Ukraine (formerly part of the USSR). The two countries had democratic administrations in 2015 but, unlike the rich states in rows #1 and #2, the World Bank classified North Macedonia as an upper-middle income country and Ukraine as a lower-middle income country. The two cases occupy different rows in the truth-table because Ukraine, which was formerly part of the USSR, has observer status in the Eurasian Economic Union. For reasons of political stability, in 2015 both of these countries had retained full MOI choice in their education systems, but the reasons for this and the form that this access to MOI choice took was different.

North Macedonia was the last of the Yugoslav states to make its titular language the official MOI for its schools. As a consequence of this, at independence the status of Macedonian as the dominant language of its linguistic market was less firmly established than that of the titular languages of the other Yugoslav states. After independence, North Macedonia continued the strategy, begun in the 1980s, of restricting the use of minority languages as MOI in secondary school and in higher education as a way of forcing the assimilation of its large ethnic minority groups and raising the status of the official state language, Macedonian (Curtis, 1992; Franolic, 1980). This policy was particularly targeted at the ethnic Albanians which, according to the 1994 EU-supervised census, formed 22.9% of the population (Clément, 1997). Whilst it was not compulsory to use the official language, Macedonian, as an MOI in secondary school, the refusal of the Macedonian government to legalise the use of Albanian as an MOI for higher education was a contributing factor to the civil violence which erupted in Macedonia in 2001. Peace was restored with intervention from NATO and the adoption of the EU and USA backed Ohrid Framework Agreement (FYR of Macedonia, 2001), Article 6 of which had a major impact on Macedonia's language policy. Though this agreement did not alter the status of Macedonian as the official language-of-state, and all students are required to learn Macedonian as a compulsory subject (Sharevski, 2013), it made any language spoken by more than 20% of the population an official language and guaranteed state-funding for university level education in that language. This is an example of how a state, despite a significant proportion of its population not using the official language in everyday life, might accommodate the use of other languages

as MOI in schools as a strategy to reduce inter-ethnic tension and avert the threat of internal conflict (Azizi, 2011; Myhrvold, 2005). This use of language rights as a "soft right" to achieve state stability is in logical contradiction to the linguistic state-building meme that the use of a single shared language in all public domains is essential for achieving a stable, unified state (G. Ferguson, 2006, pp. 5–6).

In the cases discussed so far, changes to MOI policy support linguistic state-building by encouraging, or coercing, speakers of minority languages to send their children to schools where the official state language is used as the MOI for at least part of the time. In contrast, in Ukraine, the aim of changes to its MOI policy have been to encourage ethnic Ukrainians to choose an Ukrainian-medium education for their children, rather than one that used Russian – the language of the pre-independence power. Ukraine and Belarus were the most Russified of the Soviet states. Not only did the USSR encourage the migration of ethnic Russians into Ukraine, but it also pursued an official policy of downplaying the differences between Ukrainian and Russian ethnic and linguistic identity – a policy which was also carried out in Belarus (Kulyk, 2013b). A consequence of this was that a large proportion of ethnic Ukrainians received a Russian-medium education – severing the linkage between language of instruction and ethnic identity to such an extent that 25 per cent of ethnic Ukrainian children received a Russian-medium education in 1989 (Brubaker, 2011). The policy of Russification had less of an impact in the seven Western provinces of Ukraine which were controlled by Poland before being integrated into the USSR after the end of WW2 than it did in the East and South of Ukraine which had been under different forms of Russian rule since the beginning of the Twentieth century (BBC, 2020b; Brudny & Finkel, 2011).

Ukraine's 1989 Law on Language, introduced just before independence, stated that Ukrainian was the official language-of-state and Russian had the status of *"language of interethnic communication".* Ukrainian was declared to be the standard MOI of the education system but the law also allowed parents to choose the language of instruction for their child. So there was no compulsion for ethnic Ukrainian children to learn through Ukrainian (Janmaat, 2008; Kulyk, 2013b). However, after independence in 1991 the government began a concerted

programme of Ukrainianization. One strategy was to ensure that all ethnic Ukrainians were educated as Ukrainian-speakers. This was first done by ordering local authorities to ensure that the number of places in Russian- and Ukrainian-medium first grade classes were in proportion to the ethnic composition of the local population – so children would learn through the "correct" language – effectively taking away the right to choose their child's MOI from ethnic Ukrainian parents. Alongside this policy of a gradual, year-by-year transition of all Russian-medium schools attended by ethnic Ukrainians into Ukrainian-medium schools, the Ukrainian language was introduced as a compulsory subject in all schools. However, there was still no requirement for non-Ukrainians to use Ukrainian as their MOI (Janmaat, 2008). In 1996 the official status of Russian changed again. The Constitution proclaimed Ukrainian to be the sole state language and gave the status of *"national minority language"* to Russian, Hungarian, Moldovan, Crimean Tatar (considered indigenous) and several other languages (Janmaat, 2008). There then followed more than a decade of debate over whether or not Russian should be given a special status. This debate culminated, during Victor Yanukovych's pro-Russian presidency, with the 2012 Law "*On the Principles of the State Language Policy*". Article 7 of this gave a minority language the status of Regional Language in Oblasts (administrative regions) where it was spoken by more than ten percent of the population. This had the effect of making Russian an official regional language in 13 of Ukraine's 27 oblasts, including Kyiv, and there is anecdotal evidence that in some Russian-language dominant regions Ukrainian-medium schools were pressured to convert to using Russian as their MOI (Kulyk, 2013b) (Parliament of Ukraine, 2012).

During this time, when Ukraine's linguistic state-building project was being affected by its political relationship with the powerful kin-state, Russia, Ukraine was also aspiring to join the EU. As part of the process of aligning itself with the Council of Europe's standards on the protection of language rights, Ukraine signed (in 1996) and ratified (in 2003) the European Charter for Regional and Minority Languages. Ukraine's school MOI policy was in compliance with the Charter because, as well as promoting the use of the Ukrainian language, at independence the Ukrainian government had increased, when compared to the Soviet-era, support for the use of non-Russian minority languages in education (both as an MOI and as a subject). This support included funding, textbooks,

teacher training, and allowing support from kin-states (Janmaat, 2008) (Kulyk, 2013a) (Besters-Dilger, 2009, p. 9).

After independence the use of Ukrainian as an MOI increased by more than the relative increase in the ethnic Ukrainian fraction of the population due to the out-migration of other ethnic groups. In 1989 ethnic Ukrainian's formed 72.7% of the population and 47.4% of school-age children in the 1988/89 school year were enrolled in Ukrainian-medium schools. In 2001 77.8% of the population was ethnic Ukrainian and 73% of school children in the 2002/03 academic year were using Ukrainian as their MOI (Janmaat, 2008). However, this increase was not uniform. In 2005-06, though Ukrainian was the language of instruction of 96% of schools in Kyiv, in Donetsk 71% of schools were using Russian as their MOI – reflecting the influence of Ukraine's "spliced" colonial history on attitudes towards language and ethnic Ukrainian identity (Željudenko & Sabitowa, 2015, p. 865). This disconnect was also seen in the 2001 census, where only 17% of Ukraine's residents identified themselves as ethnic Russians, but 30% called Russian their native language, and over half of respondents said that Russian was the language that they used primarily in everyday life (Kulyk, 2013b). This showed that the disconnect between language and ethnicity was still present, though it could be argued that only the youngest respondents to this census would have had their education affected by the post-independence Ukrainianization policy.

This comparative study ends just as Ukraine was entering into its current period of conflict with Russia, which began in 2014 when Russian forces annexed Crimea (BBC, 2020b). The current Ukrainian crisis shows vividly that state-building MOI policy changes can be interpreted as discriminating against minority speakers by their kin-state, and that this perceived discrimination can then be used as a pretext for military action. After over 25 years of employing a Very Accommodating MOI policy which only restricted MOI choice for the titular ethnic majority, in 2017 Ukraine adopted a new Law on Education, to strengthen the position of Ukrainian as the sole official language of the state. In addition, in February 2018, the 2012 Law "On the Principles of the State Language Policy" was rendered invalid, making Ukrainian the sole official language of the country (Maksimovtsova, 2017; Ogarkova, 2018).

Article 7 of the 2017 Law on Education continued to allow the languages of national minorities to be used as MOI in primary education (grades 1-4) but made

Ukrainian the MOI for all state-funded secondary education. This restriction was softened by allowing English and other EU languages to be used as MOI for some subjects. In addition, indigenous groups (primarily Crimean Tartars) were guaranteed the right to study through their own language in both primary and secondary education – though at the time indigenous languages had only been taught as a subject and not yet been used as an MOI (The Law on Education, 2017a)   (Tulup, 2017) . In addition, there was no restriction to teaching minority languages and literature as subjects, or to the languages that could be used as MOI in privately funded education (Stormont, 2017). The target date for the transition to all-Ukrainian-medium secondary schooling was given as 2020, later extended to 2023. The changes were estimated to affect about 10% of the student population, the majority of whom were learning through Russian (about 9%) with the rest using Romanian, Hungarian, Moldovan and Polish (Stormont, 2017; (Tulup, 2017;(Kudriavtseva, 2021).

The 2017 law marked a change in Ukraine's approach to linguistic state-building – from encouraging the use of the official language, to enforcing it. It is noticeable that, without being named, the use of Russian, the language considered to pose the greatest threat to the status of the Ukrainian language within the national linguistic market, is most restricted by this new law. The change of MOI policy was justified by Ukraine's Ministry of Education as necessary in order to raise the standards of Ukrainian language ability of minority students so that they would have better integration and career prospects. The law also reflected, with its provision for using English and other official EU languages as MOI for some subjects, Ukraine's political and economic desire to form closer links with the EU and the English-speaking world (Stormont, 2017) (Maksimovtsova, 2017).

The negative reactions to this change in language-in-education policy from outside of Ukraine showed the vested interest that kin-states have in promoting the use of their official languages beyond their own borders as a strategy for raising the status of that language within the wider, international linguistic market. Not unexpectedly, a spokesperson for the Russian Foreign Ministry called the law *"linguistic genocide"* and a leading Russian academic stated that the *"law incurs disastrous effects primarily in the sphere of education for the Russian language."* (Aref'ev, 2018). However, there were also protests from kin-states which are members of the EU. The foreign ministers of Hungary, Bulgaria, Greece, and Romania jointly signed a letter to the Council of Europe and the

Organization for Security and Co-operation in Europe (OSCE) calling for the protection of minority linguistic rights in Ukraine and challenging the law on the grounds that it breached Ukraine's obligations as a signatory of the European Charter on Minority and Regional Rights – a charge which Ukraine denied (Stormont, 2017; Tulup, 2017). The Council of Europe's Venice Commission, which provides advice on constitutional law, ruled that the Legislation broke the spirit, if not the wording of the charter and advised that the discriminatory treatment towards non-EU languages be addressed (Venice Commission, 2017) (Parliamentary Assembly Council of Europe, 2017). It remains to be seen how the current conflict in Ukraine will play out and whether changes to language-in-education policy will form part of any peace treaties.

7.3.3 Languages of ethnic identity and languages of opportunity: Kazakhstan, Belarus, Tajikistan

I will now look at the remaining ex-USSR cases, focusing on Kazakhstan, Belarus, Tajikistan and Turkmenistan, to consider how economic and diplomatic relationships with the Russian Federation (the rump state of the formal colonial power, the USSR) have influenced MOI policy in these countries.

At independence, Kazakhstan, like Ukraine, inherited a heavily Russified education system. In 1989, just before independence, the proportion of ethnic Kazakhs (39.7%) was very low and nearly equal to the proportion of ethnic Russians (37.6%). In urban centres over half of the population was Russian and the Kazakh urban élite tended to be Russian educated. The overall quality of Kazakh-medium education and the teaching of the Kazakh language as a subject was poor during the Soviet-era. At independence it was estimated that 40% of the Kazakh population was not fluent in Kazakh. In addition, the children of other ethnic minority groups, if they did not learn through their own language, were more likely to attend a Russian MOI school than a Kazakh one (Pavlenko, 2008c)(Federal Research Division: Library of Congress, 1997, pp. 3–4, 15–16, 32–33; Shakira Mukashovna, 2013). Like Ukraine before 2017, linguistic state-building in Kazakhstan focused on increasing the use of Kazakh MOI education by ethnic Kazakhs, rather than reducing the use of other languages across the population in general. (Pavlenko, 2008c, p. 71). However, Kazakhstan retained much closer political and economic links to Russia than Ukraine did and this is

reflected in its MOI policy – which balances promotion of the Kazakh language with retention of the economically useful Russian language.

Using the education system as a tool for increasing the use and status of the Kazakh language began before independence with the 1987 resolution "*On improving the study of the Kazakh language*", which had the aim of ensuring that all ethnic-Kazakh children, including those in Russian-medium schools would learn Kazakh as a subject. Article 4 of the 1997 Language Law followed the patterns of official language status and use established in the 1995 constitution. It made Kazakh the state language of the Republic of Kazakhstan and stated that it is the duty of every Kazakh citizen to learn it, but Article 5 allowed Russian to be used in national and local government *"on a level with Kazakh".* Article 6 allowed for all citizens of Kazakhstan to use their language for education and Article 16 made the state responsible for providing access to all levels of education through Kazakh and Russian and "*if necessary and possible*" through other languages. Both Russian and Kazakh were made compulsory subjects. But, unlike in Ukraine, there was no systematic policy to increase the number of ethnic Kazakhs using Kazakh as their MOI (Fierman, 1998; Law On Languages in the Republic of Kazakhstan (No. 151), 1997)

The outmigration of Russian-speakers from Kazakhstan after independence led to an increase in ethnic Kazakhs as a share of the population – reaching 63% in the 2009 Census. However, despite this demographic shift, levels of Russian-language use remained high. It was reported that 63.1% of the population could speak Kazakh and 94.4% could speak Russian (Aksholakova & Ismailova, 2013) (Brubaker, 2011). This out-migration, combined with policies to promote the use of the Kazakh language in formal domains, did lead to a decrease in the number of schools using Russian as their MOI. In the 1989/90 academic year 3,916 schools used Russian MOI and 2,613 used Kazakh. By the 1999/2000 academic year 2,390 schools were using Russian and 3,366 using Kazakh (Asian Development Bank, 2004, p. 30) (UNESCO - IBE, 2011) (Landau & Kellner-Heinkele, 2001). In the 2003/04 academic year 55.3% of school students were using Kazakh MOI, 41% Russian, and the remaining 3.7% other minority languages (Smagulova, 2008; UNDP, 2004, p. 42).

However, students in Russian MOI schools still tended to perform better than those in Kazakh MOI schools. So Russian-medium education was still preferred by the urban ethnic Kazakh élite as it was seen as being of higher quality and leading to more opportunities. And, although access to Kazakh medium higher education improved, in 2004 only 32% of students in higher education studied through the Kazakh language (Pavlenko, 2008c) (Brubaker, 2011). A similar situation occurred in Kyrgyzstan (row #6) which also maintained a "very Accommodating" MOI policy. Russian was still seen as the language of opportunity because of the strong economic links between Russia and Kyrgyzstan. Although the majority of students attend Kyrgyz-medium schools, the country's highest performing schools were all Russian-medium and there was a great deal of competition for places in them (Huskey, 1995, pp. 561–562; Orusbaev et al., 2008, pp. 488–493; Pavlenko, 2008c, p. 72).

In 2007 Kazakhstan adopted a new Law on Education. This continued to support the use of Kazakh, Russian and established minority languages as MOI in both primary and secondary schools, as well the teaching of Kazakh and Russian as compulsory subjects (Zakayeva & Iskakova, 2021) (Dotton, 2016, pp. 50–52; Smagulova, 2008; The Law of the Republic of Kazakhstan On Education (No. 319-111), 2007). In 2008 the new *State Standards for Primary Education* increased the number of compulsory hours given to teaching Kazakh language (7 periods per week) compared to Russian (2 periods per week) for all students from Grade 2 who were not using these languages as MOI (UNESCO - IBE, 2011), indicating that there was still a commitment to developing knowledge and use of the Kazakh language in formal domains. (Aldashev & Danzer, 2014; Beisenova, 2013) (Aksholakova & Ismailova, 2013). The government described the 2007 Law as being international facing and aligned with Kazakhstan's desire to strengthen already developing relations with the USA and Europe. At the time Kazakhstan was in negotiations to join the WTO (achieved in 2015) and the Bologna Process to harmonize European higher education standards (achieved in 2010). In terms of MOI policy, this "international" quality was expressed by the promotion of the acquisition of economically useful multilingualism – to be achieved through students receiving a trilingual education, using Kazakh, Russian and also English as MOI. So far, uptake of this trilingual "opportunistic"

MOI model has been low, and most students continue to learn using just one language as their MOI (UNESCO - IBE, 2011) (Republic of Kazakhstan, 2011).

Although Kazakhstan retained a "very Accommodating" MOI policy, it was not included in the Boolean solution for the truth-table because it shares a row (row #8) with the negative case, Belarus. Like Kazakhstan, Belarus is not democratic and has maintained close political ties with Russia. Unlike Kazakhstan, Belarus is dependent on Russia for the majority of its hydrocarbon needs (Central Intelligence Agency (CIA), 2017; Leshchenko, 2004). I coded Belarus as "less Accommodating" due to its pro-Russian implementation of its MOI policy.

Belarus was the state which experienced the most intensive Russification during the Soviet-era. The suppression of the use of the Belarusian language in formal domains during that era built on similar policies used when Belarus was part of the Tsarist Russian empire (Zaprudnik & Fedor, 1995). Even more so than in Kazakhstan and Ukraine, this Russification resulted in a severing of the link between ethnic identity and MOI as urban areas became increasingly Russified and the best education opportunities were available through Russian. By 1970 there were no urban schools using Belarusian as MOI (Bekus, 2014). A 1993 survey estimated that *"less than 25% of Belarusians knew their native tongue well"* (N. A. Brown, 2005). Despite this, at independence the new government of Belarus undertook a process of cultural Belarussification. The 1990 Language Law made Belarussian the sole official language of the state and the number of schools using Belarusian as their MOI increased. In the capital, Minsk, the percentage of first-grade children enrolling in Belarusian-medium education rose from 19.2% in the 1991-92 academic year, to 58% in the 1994-95 academic year (Sroka, 2007).

This brief rise in the status and use of the Belarusian language ended in 1994 with the election of the pro-Russian president Alyaksandr Lukashenka (Sroka, 2007). A referendum in 1995 granted Russian the status of co-official language – making it equal in all respects to Belarusian in all formal domains. Under President Lukashenka's increasingly authoritarian rule, political and economic ties with Russia were strengthened and a civic model of Belarusian identity not tied to any ethnic markers was promoted. Such markers became symbols of the political opposition. However, throughout this time both Belarusian and Russian

were taught as compulsory subjects in school (Bekus, 2014) (Giger & Sloboda, 2008). The right to free choice of MOI (Belarusian, Russian, or minority languages including Polish and Lithuanian) remained but the curriculum was re-Sovietized. In 1996 all of the textbooks which had been published between 1992 and 1995 were withdrawn and replaced by new versions which aligned with the new pro-Russian ideology. In 2006 the pro-Russian nature of the overall state language policy was emphasised when it was announced that Belarusian history in Years 9 and 10 would be taught in Russian, rather than Belarusian (Giger & Sloboda, 2008; Sroka, 2007). Despite the ostensibly free choice of MOI, after a decade of Lukashenka's pro-Russian regime, the number of students using Belarusian-medium education declined. Many of the students who had been enrolled in Belarusian-medium schooling in the years immediately after independence transferred to Russian-medium education – with whole schools changing their MOI. In the 2005-06 academic year 77% of students were enrolled in Russian-medium secondary schools and 23% in Belarusian-medium schools, with the remainder using Lithuanian or Polish as their MOI. This shift reflected the greater social and economic opportunities available through Russian-medium education, including a wider choice of higher education courses (Giger & Sloboda, 2008). The drop in the status of Belarusian within the national linguistic market is also reflected in Census data. In 1999, 36.7% of respondents stated that they used Belarusian in their daily lives. In 2009 this proportion had dropped to 21% (Bekus, 2014). Although both official languages are equal in law and all students have to learn both languages as subjects, the two languages are not equal in practice. Unlike in Kazakhstan, there are no special measures to promote the use of the titular language, Belarusian, so the forces of the free linguistic market drive MOI choice towards the international language, Russian, which is also the preferred language of the political administration (Smolicz & Radzik, 2004).

My data suggests that, whilst an economic reliance on the USSR alone is not sufficient to make a state retain a pro-Russian language school MOI policy, it does play a part in the choice of a state to continue to encourage the acquisition of Russian. This is seen in Tajikistan, another ex-Soviet country which is still economically and culturally dependent on Russia. Since independence Tajikistan has also restricted its MOI policy but with the intent of increasing the use of the titular language as MOI, rather than retaining the use of Russian. Unlike in

Belarus and Kazakhstan, during the USSR-era most ethnic Tajiks attended Tajik-medium schools – with only a small proportion attending the better resourced Russian-medium schools. In consequence, at independence for most ethnic Tajiks the Tajik language, and not Russian, was the language they used for education and in other formal domains (Niyozov & Bulbulov, 2013). Article 2 of independent Tajikistan's 1994 Constitution followed the precedence of its 1989 Language Law, in making Tajik the state language and Russian the language of inter-ethnic communication. The indigenous Pamir languages, spoken in the Gorno-Badakhchansky Autonomous Region (home to about 3% of the total population) were given special protected status. Article 21 of the Tajik Language Law gave residents the right to choose their child's MOI. In addition, the state guaranteed access to secondary school education through Tajik, Russian and Uzbek, and in other languages where there were enough children to make such provisions practicable. Both the Russian and Tajik language were compulsory subjects for all students (Pavlenko, 2008b) (Nagzibekova, 2008).

Compared to the rest of the countries in this truth-table, school attendance in Tajikistan was poor and the school system was heavily reliant on external developmental aid (Federal Research Division: Library of Congress, 1997, pp. 243–246).Tajikistan is a lower-middle income country and a five-year civil war just after it became independent (1992-97) destroyed its infrastructure, including the education system. The UN, Russia and Iran were all involved in negotiations to end the civil war (Niyozov & Bulbulov, 2013). By 2010 more than 5000 NGOs were working in different areas of development in Tajikistan, including supporting and reforming the education system. Tajikistan is a member of the World Bank and IDA and by 2015 had 13 World Bank administered projects with an education component – including a grant from the Global Partnership for Education which had a component supporting the use of mother tongue in early education (World Bank, n.d.-a) (Niyozov & Bulbulov, 2013, p. 245) (Asian Development Bank, 2004, p. 83) (Briller, 2007, p. 4). In addition, the Tajik education system was reliant on kin-states to support the state-schools which used minority languages (mostly Uzbek (13.8% of population in 2014), but also Russian and Kyrgyz) as their MOI. This support included providing textbooks and trained teachers (Niyozov & Bulbulov, 2013, p. 257) (Asian Development Bank, 2004, pp. 87–88) (Mukhtori, 2021).

As part of the reconciliation process after the civil war, the 1997 decree *"On the Programme of the Government of Tajikistan for the Development of the State Language and Other Languages"* was designed to raise the status of the Tajik language. This was done, not only by continuing the 1989 policy of making it a compulsory subject for all students, but by declaring it to be *"the language of science"* and thus to be used as the MOI for all science subjects in secondary schools and higher education. Other than this restriction to the MOI for science, parents continued to have the right to choose their child's MOI. In a concessionary gesture, primary schooling was also made available through the Pamari languages of the Gorno-Badakhchansky Autonomous Region (Landau & Kellner-Heinkele, 2001, pp. 193–196).

As a result of out-migration of non-Tajiks during the civil war, according to Census responses, the ethnic Russian population in Tajikistan reduced from 7.6% in 1989 to 1.2% in 2000 and the ethnic Uzbek population from 23.5% to 15.3% over the same period (Federal Research Division: Library of Congress, 1997, pp. 197, 233–236; Pavlenko, 2008b). Over the same period, the number of students using Russian medium education reduced from 6.8% of the student population in 1995/96 to 2.1% in 2006. This proportion, though small, is still larger than the ethnic Russian proportion of the total population – indicating that Russian is still seen as the language of opportunity and better quality education by some Tajik parents. Unlike in the affluent row #1 countries, the increase in proportion of students using the titular language as an MOI has been due to non-Tajik speakers leaving the country, rather than non-Tajik speakers viewing Tajik MOI education as a route to better social and economic opportunities (Briller, 2007, p. 4; Tajikistan. Ministry of Education, 2007) (Khudoikulova, 2015) (Asian Development Bank, 2004, pp. 87–88). In the Twenty-first Century the Tajik government continued to promote the use of the Tajik language. The 2009 *Law on the State Language of the Republic of Tajikistan* strengthened the use of Tajik in state controlled domains. For schools, the language-in-education policy remained the same as in 1997. (Niyozov & Bulbulov, 2013) (Khudoikulova, 2015) Alongside the promotion of the use of Tajik as the national language, the education system has also been used to maintain the population's competence in the Russian language – and the Russian government provides teaching

resources and teacher training to support this (Khudoikulova, 2015). Whilst, in 2015, Tajikistan was not a full member of the EAEU, it was heavily dependent on Russia, not only for economic and security issues but also within the field of academia. In 2005 a good knowledge of Russian became essential for participating in post-graduate level studies as Tajikistan aligned its higher education system to Russia's. This meant that all dissertations for doctoral and professional degrees had to be written in Russian in order to be approved by the Higher Attestation Commission (VAK) of the Russian Federation (Nagzibekova, 2008). This means that, although Arabic (since 1999) and English (since 2003) are also taught as compulsory subjects in school (Khudoikulova, 2015) (Nagzibekova, 2008) , and despite the emphasis in schools on using Tajik as the language of science and mathematics – it is still the Russian language which is most linked to high-level social and economic opportunities in Tajikistan.

7.3.4 MOI choice with limited external influence: Turkmenistan

The MOI policy changes of all except one of the cases in this truth-table have been influenced either by the EU's promotion of multilingualism, or by the country's management of its economic and political relationship with the Russian Federation, or both. The exception to this is Turkmenistan (row #7) which is the only country to have effectively removed all choice of MOI from both its primary and secondary school system – making the national language, Turkmen, the sole MOI.

Turkmenistan is described by the CIA World Fact Book as a country *"which rivals only North Korea for its isolationism"* and is ranked as one of the ten least free countries in the world by Freedom House (Central Intelligence Agency (CIA), 2017; Freedom House, 2021). An upper-middle income country (although half of the population live in poverty), it has large reserves of hydrocarbons, so, unlike Belarus and Tajikistan it is not dependent upon Russia, or any international organisations for fuel or other resources (BBC, 2018e) (World Bank, n.d.-a). Turkmenistan's removal of all choice of MOI from its education system was made possible by its authoritarian style of government, which suppressed all dissent from the population and its economic independence – freeing it from the need to make language policy concessions to ensure good relations with kin-states.

Pre-independence, Turkmenistan was one of the least Russified of the USSR states. The ethnic Russian population was relatively small, with most living in the capital, Ashgabat and the Majority of ethnic Turkmens studied in Turkmen MOI schools. According to 1989 Census returns the population was 72% ethnic Turkmen and 9.5% ethnic Russian, with the remainder consisting mainly of Uzbeks and Kazakhs. Just 28% of the ethnic Turkmen population described themselves as being fluent in Russian, which is low when compared to Kazakhstan, Belarus and Ukraine (Clark et al., 1997, pp. 293, 317; Clement, 2018, pp. 108, 118; Pavlenko, 2008a).

Just after independence 77% of primary and secondary schools used Turkmen MOI and 16% used Russian, with the remainder teaching through Uzbek or Kazakh. Although the majority of ethnic Turkmens attended Turkmen MOI schools, Russian-medium schools were considered to provide a higher standard of education (Clark et al., 1997, pp. 321–323). After independence out-migration, due to the suppression of non-Turkmen languages and culture in public domains, led to a relative increase in the proportion of the population which were ethnic Turkmen. In 2003 the population was estimated to be 85% Turkmen, 5% Uzbek, 4% Russian and 6% other (Central Intelligence Agency (CIA), 2017) (Pavlenko, 2008a).

Turkmenistan's linguistic state-building programme began in a similar manner to most of the other USSR successor states. The 1990 Law on Language made Turkmen the state language and the official MOI of the state-education system, whilst retaining the right for parents to choose their children's MOI for schooling (Meredova, 2013). This law also made Russian the language of inter-ethnic communication and in 1993 English was given the status of second official language, ahead of Russian (Clark et al., 1997, p. 294) (Clement, 2018, p. 119; Pavlenko, 2008b).

With the already high use of the Turkmen language in formal domains and the relatively small proportion of the ethnic Turkmen population that was fluent in Russian, initially there was broad support for the government's policy of raising the status of Turkmen in public domains. In 1993 a new Education Law changed the school MOI policy to support the administration's aim to *"Turkmenify"* education. Russian was removed as an MOI and Turkmen, English and Russian were made compulsory subjects for all students. In a further move to distance

independent Turkmen culture from its colonial Russian past, all education institutions were instructed to teach Turkmen literacy using the new Latin-based, "Turkmen National Alphabet", instead of the USSR-era Cyrillic orthography. The process of Latinization was completed, literally overnight, in all public domains after the Turkmen parliament adopted a resolution on 29th December 1999 mandating the change for the beginning of the new millennium (Clement, 2018, pp. 113, 128–133) (Meredova, 2013) (Clement, 2018, p. 8; Fierman, 2009). Free speech on language issues was suppressed from the mid-1990s onwards and the state-building *"Turkmenification"* programme became one of *"Nyýazowization"* – with all regulations over public life, including education, supporting the personality cult around President Niyazov (Clement, 2018, pp. 124, 138–139; Fierman, 2009).

In the 2001/02 academic year all foreign languages were removed from the state-school curriculum to make more room for Turkmen-specific subjects. So Russian and English were no longer taught, despite the fact that they retained their status as official languages. From the 2003/04 academic year all non-Turkmen MOI schools were ordered to transition to becoming all-Turkmen MOI schools. Some parents opted out of state education, instead using private Turkish (Islamic) schools or sending their children abroad for education. But, in 2004 it was announced that foreign diplomas issued after 1993 would not be recognised – so employment in Turkmenistan became dependent on participation in the Turkmen school system. By 2011 all private Turkish schools had been closed down or nationalised (Clement, 2018, pp. 145–157; Fierman, 2009) (Clark et al., 1997, p. 318; Clement, 2018, pp. 142–144) (Meredova, 2013). These actions had the effect of transforming Turkmenistan's inherited Soviet-era Accommodating MOI policy into a Purist-style MOI policy with only the official language used as an MOI in either primary or secondary education. The only other "ever Accommodating" state to do this was Singapore, which moved to using an all-English MOI policy. As well as being promoted as a "fair choice" which did not favour any one ethnic group, Singapore's government's justification of the choice of English as MOI was outward looking – emphasising the advantages (both to the state and individuals) of learning through that high status international language and reflected Singapore's economic need to engage with the wider world (Gopinathan, 1979; Wee, 2003). In contrast, Turkmenistan's highly authoritarian government's choice

of an all-Turkmen MOI policy was a symbol of economic independence and the ability to prosper without needing to invest in the acquisition of languages with a high value within the international linguistic market.

The death of President Niyazov in 2006 and the unopposed election of Gurbanguly Berdymukhamedov as his successor led to some changes to Turkmenistan's overall language policy in line with the new President's policy of limited re-engagement with the international community. This included permitting Russian and English to be used in the media again. The 2009 Law of Education reintroduced the teaching of foreign languages in state-schools and allowed more diversity in the MOIs used in non-state-schools. However, the state-school MOI policy did not change and remained all-Turkmen (Clement, 2018, pp. 160–167) (BBC, 2018e) (Meredova, 2013).

7.4 Creating a new tradition of using an Accommodating MOI policy: New Zealand

So far, I have discussed how new Eurasian states have managed and adapted inherited traditions of using Accommodating MOI policies. In these countries linguistic state-building ambitions to increase the status and use of a new official language were balanced against the expectations of minority groups to continue accessing education through the languages of their kin-states, and the potential advantages to the state of maintaining competency in the language of the pre-independence power. These decisions all related to the management of "kin-state" languages – languages used as an official language in at least one country in the world. In these language-in-education policies (with the exception of Tajikistan) lower status indigenous community languages were in some cases taught as subjects but not used as MOI. An example of this is the Latgalian language in the Latgale region of Latvia. Latgalian has been taught as an optional subject in a few state-schools in Latgale since the 1990s but, unlike other minority languages associated with kin-states, there is no government funding for the development of teaching programmes. In fact, there is resistance from the Latvian government to recognising Latgalian as a language distinct from standard Latvian. Possibly because doing so, and consequently acknowledging that standard Latvian is not the first language of all ethnic Latvians, would have a

negative impact on the continuing process of establishing Latvian as the dominant language of its national linguistic market (Mercator, 2009; Metuzāle-Kangere & Ozolins, 2005)

Stopping my analysis at this point would give the impression that, in the cases covered by this study, only languages with status as a national language in at least one country are used as MOI in secondary education, and that lower status community languages are only accepted for use as MOI in lower levels of education as part of a transitional, Pragmatic, MOI policy. However this is not the case and the example of New Zealand shows that state-school systems can accommodate the use of indigenous languages as MOI in secondary schools if it is politically expedient to do so.

At independence in New Zealand English was the official MOI for the whole of the state-funded education system and the use of other languages in schools was suppressed. But, starting with its 1989 Education Act, by the end of the Twentieth Century New Zealand had altered its MOI policy to such an extent that it was possible for students to complete their primary and secondary education, including taking their secondary school leaving examinations, using the indigenous language Te Reo Māori, instead of the dominant MOI, English (Education Act, 1989; New Zealand Qualifications Authority, n.d.). This accommodation of the use of an indigenous language as an MOI at all levels of education sets New Zealand's MOI policy change apart from the movement from Purist to Pragmatic MOI policies seen in the previous chapter, which do not affect secondary school MOI policy. New Zealand's policy change bears more resemblance to the (as yet untested) provision in Ukraine's 2017 Education Law for the indigenous language Crimean Tartar to be used as an MOI at all levels of education (NZHRC, 2008, p. 3; The Law on Education, 2017b).

In the late Twentieth Century the linguistic market situation in New Zealand was similar to the states in row #1 of the truth-table for the "very Accommodating" MOI outcome (Slovenia, Croatia, Czech Republic, Lithuania) which have maintained a high degree of choice in their secondary school MOI policies since independence because the status of the official language as the dominant MOI is considered to be secure enough to allow free use of community languages as alternative MOI. New Zealand is a high-income democratic country, where the dominant MOI (English) is the first language of the vast majority of the population.

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According to the 2018 census, 16.5% of the population identify as ethnic Māori, but only 4% of the population use Māori as their first language (Ruckstuhl, 2018). So, although the Ministry of Education funds Māori-medium schools, and the opportunity to learn Māori language and culture is open to all students (but not part of the compulsory core curriculum), and the granting of official status to Te Reo Māori had potentially positive consequences for the rights of its speakers, the use of the Māori language is unlikely to ever threaten the status of English as the dominant language of New Zealand's education system (R. A. Benton, 2015; New Zealand. Ministry of Education, 2015).

Unlike the cases in row #1, New Zealand's Accommodating MOI policy was not inherited from its pre-independence education system. However it does still have its origins in New Zealand's colonial history as the MOI policy change is a consequence of a political movement to resolve grievances related to breaches of the Treaty of Waitangi. In 1987 the Māori Language Act was passed, making Te Reo Māori an official language of New Zealand, and this added momentum to grass-roots and government initiatives to strengthen use of the Māori language, and raise the overall socio-economic status of the Māori community, through teaching Te Reo Māori in schools and using it as an MOI. The amount of effort that New Zealand's government has put into supporting the inclusion of Māori language and culture in schools reflects how socially and politically sensitive the issue of Māori rights are in the country. In common with many of the countries in this chapter, the advantages, in terms of avoiding social unrest, of allowing the controlled use of language choice in the MOI of secondary schools, outweighed the risk that it might pose to social cohesion by weakening the effectiveness of using schools as tools for linguistic state-building. (N. Benton, 1989; R. A. Benton, 2015; New Zealand. Manatū Taonga Ministry for Culture and Heritage, n.d.; Thrupp, 2001).

7.5 Conclusion

In this chapter I analysed decisions to retain or restrict pre-independence Accommodating MOI policies in terms of how the use of languages other than the official language(s) may be perceived by policy makers as impacting their overall project of developing a shared linguistic identity for their newly independent country. I considered how strategies for using MOI policy to support

linguistic state-building may be shaped by the relative strength of the official language within the national linguistic market; and also by the role that the continued inclusion of minority languages plays in maintaining economic and diplomatic relationships with kin-states.

I showed that in rich states where the national language is well-established as the dominant language of the national linguistic market (Slovenia, Croatia, Czech Republic, Lithuania) policies to encourage members of ethnic minorities to use official language MOI schooling have a more persuasive than coercive character when compared to states where the position of the national language is considered by policy makers to be less secure (Estonia, Latvia, Slovakia). For these latter cases, I demonstrated that the need to comply with European Union social policies in order to qualify for entry to the EU resulted in a softening of restrictions to the use of minority languages as MOI.

Although the meme of the use of a single shared language being essential for state-building appears to drive many of the restrictions to MOI policy seen in this chapter, there are also incidences of the use of minority languages being included in Accommodating MOI policies as a "soft language right" to increase state stability. This is seen particularly in New Zealand, where Māori rights are a significant political issue and also in countries which have experienced civil unrest (North Macedonia, Tajikistan).

Although the titular language in all of the ex-Soviet states has the legal status of official language, the Russian language has retained a stronger position within the MOI policies of countries which have retained closer economic and political ties with Russia (Kazakhstan, Kyrgyzstan, Belarus, Tajikistan). I contrasted this with oil-rich Turkmenistan's elimination of the use of any languages other than Turkmen in its schools. I also used Ukraine's 2017 decision to move to an all-Ukrainian secondary school MOI policy as an example of how MOI policies can be altered in response to a deterioration in diplomatic relations with a previously influential kin-state.

Within the cases which I coded as Accommodating, I identified a distinct sub-type: the "Opportunistic" MOI policy, where countries did not merely manage the relative status of languages which had a pre-independence history of being used as secondary school MOI. Instead, these countries also introduced the use of new high-status languages as MOI. An example of this is Kazakhstan's 2010

introduction of English as an MOI. This "Opportunistic" MOI policy type forms the subject of the next chapter.

8 The Opportunistic strategy: an elaboration

In the previous chapter I discussed cases which used "Accommodating" MOI policies, which offer MOI choice in both primary and secondary school. Most of these accommodating MOI policies are strategies for managing patterns of MOI choice established before the countries gained independence, generally involving relatively high-status languages used by community groups that have kin-states. However, there are some countries which, since independence, have **increased** the amount of choice in MOI for their secondary schools – a strategy which I refer to as **"Opportunistic".** They have introduced the use of additional languages as MOI, rather than just managing existing patterns of using community languages as MOI in secondary school. This strategy is also different to the choice of remaking the national linguistic market after independence by using a Purist or Pragmatic strategy to replace the dominant colonial-era language with a new national language as the main MOI for secondary education – as occurred in Timor Leste, Namibia, and Indonesia.

High-status foreign languages are commonly taught as subjects within state-school systems, even those with Purist MOI policies, as the acquisition of such languages is felt to have the potential to improve social and economic opportunities to the learner and, by extension, the state. For most countries, the boundaries of their national linguistic markets are permeable and the relative utility of languages within them can be influenced by political and economic relationships with other countries and the movement of people (Blommaert, 2010, Chapter 2). In consequence, for a growing number of students, future social and economic opportunity appears to be dependent upon being able to use other, internationally useful languages, in addition to achieving fluency in their state's official language. In the Twenty-first Century, the perceived necessity of knowledge of English as a prerequisite for participation in international fields has led to increasing amounts of curriculum time being given to the teaching of English as a subject and, in some circumstances, it being adopted as a MOI. This increased promotion of the acquisition of English has been seen in all of the member states of the ASEAN region, as well as in Japan and South Korea (Jeon, 2012; Kirkpatrick & Liddicoat, 2017).

The Opportunistic MOI type refers to language-in-education policies which have crossed the divide between teaching an economically useful language as a

subject and using it as a MOI – in addition to, or instead of, the dominant language-of-state. The Opportunistic category was difficult to develop a definition for that could be applied in a consistent manner simply by examining the wording of policy texts. There were several reasons for this: these policies can have considerable overlap with intensive language-as-subject initiatives (such as Singapore's SAP schools); "Opportunistic" initiatives may not be included in descriptions of mainstream education provision, or they may be conflated with bilingual dominant-minority language schemes (Eurydice Network, 2006b, 2006a); the policies (with the notable exception of Rwanda) often target a small proportion of élite, or high-performing students; the distinction between state- and privately-funded education can be unclear; and a significant proportion of the language-in-education literature seems to treat the adoption of English-medium-instruction as a phenomenon distinct to the introduction of any other new language as an MOI in the state-school sector. Given these issues and since this category emerged as a way of understanding the inconsistencies in my QCA for the accommodating strategy, I have used a case-by-case approach to exploring and understanding this category.

I defined an MOI policy as "Opportunistic" if, a new, high-status language (not typically considered to be present in the linguistic market) is introduced as an MOI after independence, particularly for students-groups who have typically used the state's official language as their sole MOI. This definition is less robust than those for the other MOI strategies as determining whether a language being introduced as an MOI is "new" or "high status" is a subjective decision which needs to take into account many case-specific factors. Also, I consider that the concept of being "Opportunistic" does not lend itself to a meaningful analysis of negative cases because many of the arguments justifying the retention of European languages as part of a Purist or Pragmatic MOI by African countries that became independent in the 1960s drew on similar ideas – related to competitive access to global fields – as those used to justify the adoption of these, newer, Opportunistic policies (see Chapter 6).

In Chapter 5's summary table of MOI policies I indicate the presence of an Opportunistic MOI policy with an asterisk * after the policy date. The countries which I identified as promoting the introduction of new, high status, languages to their secondary school MOI policies are: the Czech Republic (CZE2008); Kazakhstan (KAZ2010); Lithuania (LTU2001); Slovakia (SVK2001); Rwanda

(RWA1996 – RWA2008); and Indonesia (IDN1989). With my "amount of choice" MOI policy coding, the Opportunistic addition of languages as media of instruction is hidden in cases which already have an accommodating MOI policy. However, it can be clearly seen in Indonesia which, at the beginning of the Twenty-first Century added an international-facing Opportunistic aspect to its well-established linguistic state-building Pragmatic-type MOI policy.

8.1 Indonesia's Opportunistic MOI policy

The decision by Indonesia's government at the beginning of the Twenty-first Century to promote the use of English as an MOI within some of its state-schools marks a startling departure from its policy, since independence, of using bahasa Indonesia – the national language and symbol of national unity – as the sole MOI of all levels of education except early primary school. The effectiveness of Indonesia's policy of replacing the dominant colonial language, Dutch, with an "authentic" national language is in marked contrast to the outcome of policies with similar aims in Tanzania, the Philippines, or even the Baltic states and Ukraine – where the colonial language still plays a significant role as an MOI within their modern education systems. Indonesia's success in establishing bahasa Indonesia as the dominant language in all state-controlled formal domains has been attributed to a combination of factors which remade the national linguistic landscape. These included: the renaming of the regional lingua franca, Malay, as bahasa Indonesia and its adoption as a symbol of national unity in 1928 by the Indonesian independence movement; restricted access to Dutch-medium education during the early Twentieth Century; the banning of the use of Dutch in public domains, including education, by the Japanese occupying forces during WW2 and the development of bahasa Indonesia to replace it; the 1945-48 war of independence against the Dutch – where bahasa Indonesia was used as both a symbol of resistance and unity and as a practical tool of communication and propaganda; and the rapid expansion of the post-independence basic education system under two charismatic and increasingly authoritarian leaders – Sukarno (1945-67) and Suharto (1967-98) (Alisjahbana, 1976, pp. 39–41; de Swaan, 2001, pp. 85–92; Keane, 2003; Montolalu & Suryadinata, 2007; Watson, 1980). Together, these factors shattered the social systems which supported Dutch in its position as the dominant MOI and replaced it with a system where literacy in

bahasa Indonesia was necessary to access high-status social and economic opportunities. Dutch literacy did not immediately lost all its value, but the social conditions were remade so that (aided by the relatively low utility of Dutch as a language of inter-national communication, and a 1957 ban by Sukarno on the production or use of Dutch print media (de Swaan, 2001, p. 92)), bahasa Indonesia was unchallenged as the appropriate MOI for independent Indonesia's education system. Whilst the promise of access to social and economic opportunities through education was certainly a strong driver of the spread of literacy in bahasa Indonesia across the country, this process was not left to chance. To remove practical barriers, the government supported an intensive program of corpus planning and publishing to ensure that bahasa Indonesia could be used in all high-level domains (Alisjahbana, 1976; Nababan, 1991). To ensure the effectiveness of acquisition planning, under the Suharto-era government all Indonesian nationals were required to attend Indonesian schools. Access to international schools (which used curricula from other countries) was nearly impossible for Indonesian nationals – so even the children of the very rich (unless they were sent overseas) experienced a common national education (Coleman, 2011a). This is not to say that Indonesian's received a uniform educational experience. Independent Indonesia's education system has always been composed of a diverse mix of state and privately-run, religious and secular, high and low status schools. For all schools though, whether supervised by the Ministry of Religious Affairs or the Ministry of Education, teaching a government approved curriculum – which included using bahasa Indonesia as the MOI – was a requirement for receiving any government funding (Zuhdi, 2006). From independence to the present day, in all of Indonesia's schools, the teaching and use of bahasa Indonesia has been firmly intertwined with the promotion of a shared sense of national identity. This goal is explicitly stated in the official explanatory section of the 1950 Law on Education, which declares:

> *"What really declares the national character of education in our country is bahasa Indonesia becoming the language of education in all schools, Language is a tool for expressing thoughts, but as well as that, it is the most important tool for strengthening the sense of national unity."* (Peraturan Tentang Dasar Pendidikan Dan Pengadjaran Disekolah, 1950)*.*

In areas of conflict, where loyalty to the state was in doubt (as was the case in Timor Leste), this compulsory national schooling (whether provided by a state- or private-funded institution) was used as a mechanism to suppress problematic linguistic or cultural identities. The 1967, Suharto-era, ban of public displays of Chinese culture – justified as protecting the country against the threat of Communism – is another example of the efforts the authoritarian government went to reinforce its language policy against perceived threats. This policy effectively brought an end to private Chinese-medium education in Indonesia, with its possibility of offering an alternative route to economic or social opportunity (Purdey, 2003; Presidential Instruction about Chinese Religion and Culture [Instruksi Presiden Republik Indonesia No.14 (1967) Tentang: Agama, Kepercayaan Dan Adat Istiadat Cina], 1967; Suryadinata, 2001).

Ideologically, this linguistic state-building effort was not designed to turn Indonesia into a monolingual country. The motto "Bhinneka Tunggal Ika" (Unity in Diversity) reflects the official rhetoric that bahasa Indonesia is meant to complement, not replace community languages; and community languages still form an important part of individuals' overall linguistic capital (Goebel, 2014). The official position of community languages within Indonesia's formal linguistic market is described in the 1945 constitution, Article 36, which declares that "*The national language is bahasa Indonesia*" is accompanied by the clarifying statement:

> *"In areas that have their own language, that is valued by the citizens (for example, Javanese, Sundanese, Madurese etc.) that language will be respected and valued by the state too. Those languages form part of the living culture of Indonesia."*

The right to use community languages (in addition to, not instead of, bahasa Indonesia) in formal situations continues to be upheld in the 2009 "*Law about the National Flag, Language and Symbols and the National Anthem*" (Zentz, 2014) This official respect for community languages is also reflected in Indonesia's choice of a "Pragmatic" MOI policy - allowing the use of community languages as MOI in the first three years of primary school, as well as making space in the curriculum for teaching local language and culture (Nababan, 1991). Article 5 of the 1950 Education Law states that:

> *1. Bahasa Indonesia, as the language of unity is the language of instruction in schools throughout the Republic of Indonesia.*
> *2. In kindergarten and the three lowest classes of primary school the local language may be used as the language of instruction.*

Unfortunately, the policy of using local languages as MOI in early primary school is only effectively implemented for the more politically and economically powerful community languages, such as Javanese, Sundanese and Balinese (Alwasilah, 2013). So far, it would seem that this discussion of Indonesia's MOI policy would fit better in Chapter 6, where I explored MOI policies that use different strategies to achieve formal monolingualism in high-level state-controlled domains. However, in this chapter I want to examine the "Opportunistic" change to Indonesia's MOI policy at the turn of the Twenty-first Century and to argue that this can still be explained from a linguistic state-building perspective.

A new Education Law was introduced in 1989, which made English language a compulsory, and examinable, subject in junior and senior high schools (Article 39:3), formalizing a policy, in place since 1945, of teaching English as a first foreign language (Nababan, 1991; Zein et al., 2020). But, more dramatically, it allowed for the use of languages other than bahasa Indonesia as the MOI in Indonesia's schools:

> *Article 41*
> *The language of instruction in national education is bahasa Indonesia*
> *Article 42*
> *1. The local language may be used as the language of instruction in the early stage of education to the extent that it is needed to deliver certain knowledge or skills.*
> *2. Foreign languages may be used as the language of instruction to the extent that they are needed to deliver certain knowledge or skills.*
> (Undang-Undang Republik Indonesia Nomor 2 Tahun 1989 Tentang Sistem Pendidikan Nasional, 1989)

This relaxation of which languages could be used as MOI when teaching Indonesian nationals marked a significant change in Indonesia's state-education system, a potential softening of the linguistic state-building project, and a widening of the range of educational experiences open to the children of more affluent Indonesians – though it did not make a significant change to the use of

languages for teaching and learning in mainstream state-funded Indonesian schools. The 1989 Education Law did, however, enable the emergence of a new type of private school in Indonesia – the *"Sekolah Nasional Plus"* ("National Plus School"), These privately-funded schools, staffed by a mix of national and expatriate teachers, delivered an enriched version of the Indonesian national curriculum, with many of them offering pathways to gaining official credentials through both the Indonesian and a foreign education system (Sundusiyah, 2019; Zacharias, 2013). One such school is Sekolah Dyatmika, a privately run, fee-paying K-12 school in Bali which opened in 1996 and offers bilingual (English, bahasa Indonesia) education, following a blend of Australian, Indonesian, and English curricula. It is both an Accredited Cambridge Examination Centre and a Satuan Pendidikan Kerjasama (a school accredited by Indonesia's ministry of education), which means that the socially advantaged students which graduate from Dyatmika have the potential to access opportunities through both the domestic and foreign higher education systems (Sekolah Dyatmika, n.d.). Whilst attending a Sekolah Nasional Plus is an option open only to wealthier Indonesians, and bahasa Indonesia remained unchallenged as the language of teaching and examination with Indonesia's school system, this broadening of choice in MOI stood in marked contrast to the previous policy of forcing all citizens, however wealthy, to use a shared MOI – bahasa Indonesia – in order to reshape the country's linguistic market after independence.

The 1990s brought dramatic changes to Indonesia's political landscape. After widespread protests and rioting, President Suharto resigned in 1998, in 2004 Indonesia had its first ever presidential elections and the administration of public services, including education, was decentralized, allowing for greater diversity of provision (BBC, 2018c; Purdey, 2003). Twenty-first Century Indonesia is classified by the World Bank as a lower-middle income country. Whilst there is a growing and affluent middle class, in 2010 over 30% of the population lived below the poverty line (Coleman, 2011a). In July 2005 Indonesia introduced free basic (primary and junior high school) education, through a per-capita funding scheme for schools called Bantuan Operasional Sekolah (Suhardi, 2020). The decentralization of Indonesia's education system was codified in 2003 in a new Education Law, which included new regulations for MOI (Raihani, 2018).

Article 33
(1) Bahasa Indonesia as the National Language is the language of instruction for national education.
(2) The local language may be used as the language of instruction in the early stages of education [first and second year of primary school] if needed to deliver certain knowledge or skills,
(3) Foreign languages can be used as the language of instruction for certain subjects to develop the foreign language abilities of students.

Article 37 [clarification]
The languages studied consist of bahasa Indonesia, local languages, and foreign languages for the following reasons:
1. Bahasa Indonesia is the national language;
2. Local languages are the mother tongues of students; and
3. Foreign languages, particularly English, are international languages that are very important for using in global relations.

Article 50
[In each province] The national government and/or the local government should organize for at least one educational establishment at all levels of education to develop to become an international standard educational institution.

(Undang-Undang Republik Indonesia Nomor 20 Tahun 2003 Tentang Sistem Pendidikan Nasional [Act of the Republic of Indonesia about the National Education System], 2003)

On the surface, Article 33 of the 2003 Language Law does not appear to be significantly different to Articles 41 and 42 of the 1989 Education Law. However, when combined with Article 50 – which calls for the development of at least one *"International Standard School"* in every province (34 in number in 2003) it resulted in a significant change to the way in which languages were used as MOI within Indonesia's state-funded education sector.

In 2007 the Indonesian government launched a well-funded scheme to develop the network of international standard schools required by the 2003 Education Law. Already high-performing (socially and academically selective) state-schools could be nominated by their regional government to join the International Standard Schools (ISS) pilot project (Rintisan Sekolah Bertaraf Internasional, RSBI). The criteria for achieving ISS status included: being accredited to use an

international curriculum which led to internationally recognised qualifications alongside the Indonesian national curriculum; increasing the number of teachers with post-graduate qualifications; and using English as a MOI (Coleman, 2011a). Schools accepted into the RSBI project were given extra district, provincial and regional government funding to facilitate reaching the standards required for ISS accreditation. They were also allowed, unlike standard state-schools, to levy additional funds from students' families. In total, on a per-student basis, RSBI institutions cost four times as much as standard schools (ACDP, 2013, p. ix; Zacharias, 2013). The élite nature of the RSBI project can be seen in its relatively small scale – only 1339 schools (less than 0.5% of Indonesia's state-schools) were involved in the RSBI initiative, more than half of them in Java (ACDP, 2013, p. ix; Zacharias, 2013). To achieve SSI status schools needed to have at least 20% low-income students in their intake. The official evaluation of the RSBI scheme showed that 88% of students came from upper- and middle-income families, with the majority of low-income students being enrolled in technical schools. Although some of the RSBI funding could be used for scholarships, there is anecdotal evidence that school management and parents, in these traditionally highly-selective schools, were resistant to admitting and supporting lower-SES students (ACDP, 2013, p. ix; Coleman, 2011a).

In January 2013 the ISS pilot project (RSBI), was declared unconstitutional by Indonesia's constitutional court. This was not because a chief requirement of ISS accreditation was to teach using English instead of bahasa Indonesia, nor that students in RSBI schools did not perform better than students in equivalent non-RSBI schools. Rather, it was because the extra, preferential, government funding given to the schools involved in the RSBI pilot project went against the Pancasila principle of social justice for all (Keadilan sosial bagi seluruh rakyat Indonesia) (ACDP, 2013, p. xv; Alwasilah, 2013; Sumintono, 2013). Whilst the pilot funding programme has been wound up, the 2003 Education Law, permitting the use of foreign languages as MOI in state-schools and requiring the development of international standard schools remains in force. So élite, highly selective, Indonesian state-schools, such as SMA Negeri Unggulan M.H. Thamrin, Jakarta (a senior high school) continue to offer preparation for both international and national examinations, using both English and bahasa Indonesia as MOI (Cambridge University Press and Assessment, n.d.; SMAN MH Thamrin, 2020).

The RSBI initiative is an example of how the wider international linguistic market can affect national MOI choice. Increasing the foreign language skills, particularly English, of Indonesia's workforce, in order to facilitate participation in regional and international markets, is presented as being necessary for Indonesia's economic development both by the Indonesian government and by international commentators and investors (OECD/Asian Development Bank, 2015, pp. 68–69, 101–130, 230–231; Raihani, 2018). Their recommendations for language acquisition strategies focus on developing the language skills of graduates and white-collar professionals and ignore the needs of Indonesia's large number of low-skilled migrant workers, whose remittances make a significant contribution to Indonesia's economy (Coleman, 2011a; OECD/Asian Development Bank, 2015, pp. 68–69). Whilst English is the language most often associated with "globalisation" and "international competitiveness" and the only international language explicitly promoted for use as an additional MOI in Indonesian schools (Coleman, 2011a), learning other politically and economically useful languages is also promoted by Indonesia's government (Republik Indonesia, 2014, pp. 6–70). With the lifting in 1999 of the 1967 ban on public expressions of Chinese culture, this has included the learning and teaching of Chinese language as a subject (mostly in the tertiary and vocational sectors) as, given Indonesia's strong trade ties to China, it is a politically and economically useful language (Rakhmat, 2021). Similarly, the rising political and economic power of China in the Twenty-first Century has led to Singapore giving greater importance to the academically-selective strand of its Chinese Mother Tongue programme – though it has not led to Singapore changing its English-only MOI policy (Goh, 2017, Chapter 3; Tan, 2006).

Whilst in the Twenty-first Century Indonesia has modified its state-building MOI policy to allow for teaching using foreign languages – both as a way of developing economically useful (both for individuals and the country as a whole) language skills and to signal the development of an "international standard" education system (Sundusiyah, 2019; Zacharias, 2013), it is still committed to strengthening the status of bahasa Indonesia both nationally and internationally. Indonesia's era of "Reformasi" has been accompanied with a great deal of social, political and religious unrest (BBC, 2018c; Republik Indonesia, 2014, sec. 2.2.1). The

strategic planning documents from Indonesia's National Development Planning Agency and its Ministry of Education and Culture from 2010 – 2020 emphasise the role of bahasa Indonesia in strengthening the sense of national identity in individuals, and also the identity of Indonesia as a nation, and stress the importance of the education system for achieving this (Kementerian Pendidikan dan Kebudayaan (Kemendikbud), 2013, pp. 31, 79; Republik Indonesia, 2014, pp. 6–188).

Strategies for reinforcing the status of bahasa Indonesia include acquisition- and corpus-planning, such as: *"strengthening the use of bahasa Indonesia in all subjects – especially those which use many foreign technical terms (science, mathematics and religion)"* (Kementerian Pendidikan dan Kebudayaan (Kemendikbud), 2020, pp. 53–54). The mention of religion (a compulsory subject in all schools) is an indicator that the status of bahasa Indonesia is considered not only to be threatened by English, but also, given the trend of stricter adherence to Middle-Eastern models of Islamic observance in Muslim-majority Indonesia, by Arabic too (Burhanudin & van Dijk, 2013).

Reflecting the interconnectedness of national and educational linguistic markets, the Ministry of Education and Culture also sets out plans to, *"improve the quality of Indonesian and its use as a science and technology promoter and strengthen Indonesia's competitiveness, as well as increasing the role of Indonesian as the language of communication in the ASEAN region."* (Kementerian Pendidikan dan Kebudayaan (Kemendikbud), 2013, p. 25). Strategies for doing this include corpus planning so that bahasa Indonesia can be used in technical domains; improving teaching and testing of Indonesian as a foreign language; and monitoring the number of countries which offer Indonesian as a foreign language within their education systems. Encouraging the use of bahasa Indonesia in high status domains outside of the country would strengthen its status within Indonesia's national linguistic market because the language would maintain its value for accessing social and economic opportunity beyond the country's borders.

8.2 Opportunistic MOI policies in Europe

Indonesia's "Opportunistic" MOI policy route for its state-school sector – featuring restricted access to bilingual (national+international language) education through

academically selective schools has similar characteristics to CLIL education initiatives in Europe. Content and Language Integrated Learning (CLIL) is a term that refers to either strengthening the teaching of a foreign languages by using them as MOI for non-language subjects, or for giving more space for the use of regional or minority languages as MOI within mainstream education. The acronym CLIL was first used in 1994 at the University of Jyväskylä in Finland by David Marsh. (Díaz Pérez et al., 2018; Hanesová, 2015). The CLIL MOI strategy is a language teaching method which has been actively promoted by the European Commission since the 1990s to support its policy goal of creating a multilingual Europe (European Commission - Directorate-General for Education Youth Sport and Culture, 2006; Pérez-Cañado, 2012). CLIL is a new term for a foreign language acquisition strategy which has a long history of being used in Europe. In Estonia, for example, high-performing Russian and Estonian medium-schools were using English and German as MOI for certain subjects from the 1960s (Dvorjaninova & Alas, 2018; Stevick, 2015a). Legislation which allows for modern CLIL provision, with the Opportunistic goal of using MOI to broaden the language repertoires of students who would otherwise use their state's official language as MOI, has become more common in Europe since the end of the Twentieth Century (European Commission - Directorate-General for Education Youth Sport and Culture, 2006, p. 14).

As in Indonesia, in Europe there are also concerns that widespread use of an Opportunistic MOI policy (national language+foreign language), has the potential to reduce the use of the national language in certain domains (such as natural science research), thus weakening the overall status of the national language within the national linguistic market (Pérez-Cañado, 2012). However, as in Indonesia, in the European cases the "Opportunistic"-style CLIL initiatives affect only a small proportion of students when compared to the more-established "Accommodating" MOI policies which balance use of the official titular language with community languages. For example, in the first decade of the Twenty-first Century, Kazakhstan introduced English as an additional MOI to support the widening of its political and economic relationships beyond the Russian-speaking world (Aminov et al., 2010). However by 2012, although 2067 of Kazakhstan's nearly 8000 schools were using two or more languages as MOI, just 39 of them were following the flagship trilingual "Opportunistic" policy of teaching through

Kazakh, Russian, and English (UNESCO - IBE, 2011; Zharkynbekova et al., 2014). There were 33 trilingual (Kazakh, Russian, English) schools "for gifted children" (5000 students) and 6 highly selective "Nazarbayev Intellectual Schools" (4000 students) which were established in 2011 to provide an "international standard" education (Ministry of Education and Science of the Republic of Kazakhstan, 2014, pp. 61–62; Republic of Kazakhstan, 2010, p. 38). In addition, there were also more than 15,000 students studying in private Kazakh-Turkish lyceums, which use four languages for teaching (Kazakh, Russian, English, Turkish), reflecting Turkey's interest in influencing the education policies of the majority-Muslim Central Asian States (Landau & Kellner-Heinkele, 2001; Zharkynbekova et al., 2014). Overall, this created a situation where the majority of Kazakhstan's ethnic Kazakh students still studied through the long-established official national languages, Russian and Kazakh.

Where the European Opportunistic MOI policies in differ to Indonesia's is that they are being applied to education systems which already have a tradition of using more than one language as the MOI for primary and secondary education. This has the interesting effect that in some countries "Opportunistic" MOI strategies (which sometimes replace the use of the national language as MOI) are being promoted at the same time as more traditional "Accommodating" MOI provision is being restricted by making requirements that the national language be used as an MOI at least part of the time. As discussed in the previous chapter, in Slovakia since independence there has been a concerted policy of controlling and weakening the status of Hungarian within the national linguistic market by converting Hungarian MOI schools to bilingual Hungarian + Slovakian MOI schools (Langman, 2002). However, since 2001 there has been an increase in "Opportunistic" bilingual teaching, as well as limited initiatives to increase the number of schools using the Roma language in teaching. (Eurydice Network, 2006b; New, 2011). Since the 1990s Slovakia has had 18 selective bilingual state secondary schools (Bilingválne gymnázium) for high-performing students that use Slovak and a second European language (English, French, German, Spanish, Italian or Russian (from 2005)) for teaching and learning. Slovakia has also had pilot projects using similar Opportunistic MOI in lower levels of education since the 2001/02 school year. These bilingual secondary schools follow the Slovak mainstream curriculum and assessment regulations, enriched with

materials agreed by European partner countries. The assessment policies of these schools are described as being *"usually based on a combination of national and foreign principles geared to international approval, enabling undergraduates to pursue their higher education at home or abroad, or enter the international labour market."* – highlighting the international-facing nature of Opportunistic MOI strategies (Eurydice Network, 2006b).

In Slovakia both national language+foreign language and national language + minority first language bilingual programmes are referred to as CLIL– effectively down-playing the linguistic state-building driven reduction of the use of Hungarian-medium education by grouping it with the (European Commission approved) promotion of multilingualism (Eurydice Network, 2006b; New, 2011). A similar pattern to Slovakia is seen in modern-day Estonia, where bilingual Opportunistic (national+foreign language) MOI is permitted in "*schools with profound language study*", although there is also a policy of transitioning all Russian-medium schools to using a bilingual Estonian + Russian MOI with Estonian as the language used for most subjects. One of the reasons given for promoting the learning of foreign languages is to increase the "*international representation*" of the Estonian language by training translators and increasing the teaching of Estonian as a foreign language in other countries (*Estonia. Basic Schools and Upper Secondary Schools Act*, 2010, pp. 43–44; European Commission, 2018). As with Indonesia's extension of its national language planning beyond its borders, this is hoped to further strengthen the position of Estonian within its national linguistic market.

The adoption of CLIL-type Opportunistic MOI strategies is also used in Lithuania, where pilot projects running since 2001 for both types of bilingual MOI provision are both described as being CLIL strategies (Eurydice Network, 2006a). A difference between this use of CLIL in Lithuania when compared to the other two countries is that in Lithuania participation in the initiative to introduce the use of Lithuanian as an MOI for some subjects in minority-medium schools (mainly Russian and Polish) is optional (Verikaitė-Gaigalienė & Andziulienė, 2019). This difference can be interpreted as being due to the robust status of Lithuanian as the dominant language within Lithuania's linguistic market when compared to the status of Estonian and Slovak within their respective national linguistic markets (L. Bulajeva & Hogan-Brun, 2008; Hogan-Brun et al., 2008).

Overall, these Opportunistic MOI policies, which have increased in prominence since the end of the Twentieth Century, can be seen as contributing to linguistic state building in countries where the dominant MOI is not an international language. In such a country the dominant status of the national language within the national linguistic market could be threatened if enough people feel that they (or their children) would have more social and economic opportunities through languages other than (or in addition to) the language-of-state. The Opportunistic MOI strategy caters to the aspirations of this élite by offering them the chance to learn through an international language but maintains the status of the national language by making high academic performance (which is presumably dependent upon fluency in the national language) a requirement for entry to the programme. As has been seen, Opportunistic MOI programmes may be permitted at the same time as access to traditional Accommodating MOI policies is being restricted. Such a situation is a reminder that the goal of most linguistic state-building policies is not to create a monolingual society, but rather one in which there is no challenge to the status of the dominant language-of-state as the appropriate language for use in formal national domains.

8.3 Rwanda 1996-2008: from Purist to Opportunistic to Purist again

Rwanda's MOI policy changes do not fit neatly into any of the common patterns of movement between MOI policy types that I have identified. In 1996 Francophone Rwanda appeared to adopt an Opportunistic MOI policy, introducing the novel option of using English as the language for teaching and learning within its state-school system. However, this action of introducing a new, high-status, MOI had a very different character to the Opportunistic MOI policy of Indonesia which sought to broaden the language skills of an élite group of students whilst leaving unchallenged the status of bahasa Indonesia as the dominant language of its national linguistic market. In 2008 Rwanda restricted MOI choice again, making English the sole MOI for secondary and tertiary education – an action which had more in common with Indonesia's 1945 decision to replace Dutch with bahasa Indonesia that its 1989/2003 permission to use foreign languages as MOI. How was Rwanda's government able to change the "rules of the game" (Bourdieu & Wacquant, 1992, pp. 94–114) and establish

English as the new high-status language of its linguistic market? I would suggest that, as in Indonesia in 1945, low levels of literacy, a violent transition of power, and an authoritarian style of government were all necessary parts of achieving this.

Rwanda is unusually linguistically homogeneous (index of linguistic fractionalization = 0.09) for Africa, with more than 90% of the population (both Hutu and Tutsi) using Kinyarwanda as their first language. In contrast, estimates at the beginning of the Twenty-first Century put the number of speakers of the two international languages, French and English, used in Rwanda as between 3-5% and 1.9-5% respectively (Samuelson & Freedman, 2010). Belgian colonial rule established a dual-language Purist-type pattern of using Kinyarwanda as the MOI for basic primary education, with access to French-medium secondary education restricted to an élite Tutsi minority. A World Bank survey of educational participation as a proportion of age group showed that in 1973, whilst 52% of children participated in Kinyarwanda-medium primary education, this proportion dropped dramatically to 2.1% and 1.4% respectively for French-medium junior and senior secondary education (World Bank Group, 1975). This policy, combined with the emigration at independence of a large number of educated Tutsi (World Bank Group, 1968) resulted in a situation in independent Rwanda where Kinyarwanda became the language of everyday literacy, communication and administration, despite French being the language of the decision-making élite, a pattern which was maintained through to the 1990s (Pearson, 2014).

From independence, Rwanda was politically volatile and frequently in a state of civil conflict. The country remained poor, and many Rwandans left to live in exile in neighbouring countries. This political volatility culminated in the 1994 Rwandan Genocide, in which 800,000 Tutsis and moderate Hutus were killed, and two million Rwandans left the country as refugees. After the Genocide a new government, led by the Rwandan Patriotic Front was formed and large amounts of international aid were given to rebuild the country (BBC, 2018d; Commonwealth Secretariat, 2021b). Both of these factors increased the use of English, alongside French, in high status domains. As well as the near-ubiquitous use of English within the international development community, many influential

members of the RPF government were returning refugees and had been educated in Anglophone countries (Samuelson & Freedman, 2010).

Plans for English to be used in education started to be formed in 1994, partially to accommodate the children of refugees which had returned from exile in Anglophone countries and thus would have difficulty in accessing French-medium schooling. Introduced in 1996, the new policy of using Kinyarwanda as MOI for the first three years of primary school and then offering a choice of French or English as MOI gave flexibility. But the introduction of English to schools affected all students as both English and French were now taught as compulsory subjects from the first year of primary school (Obura, 2003, pp. 39, 88). This MOI policy was formalized in the new 2003 constitution, which made French, English and Kinyarwanda official languages and Kinyarwanda the national language.

From the mid-1990s into the first decade of the Twenty-first Century, Rwanda's authoritarian administration strengthened its diplomatic, aid, and trade relationships with the Anglophone world – joining the East African Community (which uses English and Swahili as its official languages) in July 2007 & the British Commonwealth in 2009 (Commonwealth Secretariat, 2021b; Samuelson, 2012; Spowage, 2018). At the same time, Rwanda's diplomatic relationship with France deteriorated dramatically – reaching a nadir in 2008, with Rwanda accusing France of having played an active role in inciting the genocide of 1994 (Samuelson, 2012; Samuelson & Freedman, 2010). In 2008 the policy of French-English MOI choice was revoked, and the Presidential Cabinet ordered for all state-schools to immediately transition to using an all-English MOI policy through all levels of education, though French was retained as an additional language and still permitted to be used as an MOI in private schools (Leclerc, 2022). The all-English policy was modulated by the 2011 *Law No.2 on the Structure of Education*, to allow Kinyarwanda to be used once again as the MOI for the first three years of primary school (Pearson, 2014).

One of the justifications for using an all-English MOI was that offering a choice of MOI risked becoming a new source of ethnic cleavage (Francophone Hutu and Tutsi genocide survivors, and Anglophone Tutsi and returned refugees) along language lines (Samuelson, 2012). Another was economic, President Kagame is quoted in 2008 as saying he was giving priority to the language which *would "serve our vision of the country's development"* (Leclerc, 2022). In the academic literature it is reported that the transition from French to English medium

education put a great deal of pressure on teachers, but the authoritarian, top-down nature of Rwanda's education policy-making environment did not allow for dissent (Kral, 2022; T. P. Williams, 2019). From the perspective of the national linguistic market, I feel that this change of dominant MOI was accepted, not just because it was implemented in an authoritative manner, but also because it did not have a significant detrimental effect on the effective value of the linguistic capitals of most Rwandans. This is due to the role of Kinyarwanda within Rwanda's linguistic market as the shared language of everyday literacy, media, communication and administration. Table 8-1, below, shows that whilst Rwanda has a literacy rate of 85% in 2015, given the low levels of completion of post-primary education (particularly for the poorest quintile), for most Rwandans this literacy can be assumed to be mainly in Kinyarwanda (Pearson, 2014). Changing the MOI of post-primary education changed the dominant language of high-level state-controlled domains, but this change affected only the small number of highly-educated Francophones – the national linguistic identity of the majority of Rwandans was not affected.

Indicator	average	poorest quintile	richest quintile
youth (15-24) literacy rates	85%	66%	93%
completed primary education	54%	29%	73%
completed lower secondary education	23%	7%	42%
completed upper secondary education	15%	3%	42%

Table 8-1 educational achievement indicators for Rwanda (2015) Source (UNESCO Institute for Statistics (UIS), n.d.) [accessed 10th June 2022]

Rwanda's switch from French to English as the dominant MOI for secondary education can still be understood as fitting within the logic of linguistic state-building – but it is the creation of a new state identity, rather than the maintenance or reinforcement of a previously determined policy. The post-Genocide administration of Rwanda remade the country with a new official linguistic identity to reflect its new diplomatic positioning as a member of the Anglophone world.

The remaking of the national linguistic market in Rwanda between 1994 and 2008 has much in common with the MOI changes seen in newly-independent

Indonesia in 1945 and Timor-Leste between 1999-2002. In all of these cases a violent transition of power in a country where only a small proportion of the population were well educated, made a complete change to the dominant MOI possible. However, I would suggest that this would not have been possible if these countries had not also had a second shared national linguistic identity (Kinyarwanda in Rwanda, bahasa Indonesia in Indonesia, and Tetum in Timor Leste) in addition to the language of the colonial power that was rejected. The retention and development of these languages within each country's language-in-education policy enabled the maintenance of a sense of "authenticity" to the country's new linguistic identity.

This reason may help to explain why Equatorial Guinea has not made any changes to its Purist, all-Spanish MOI since independence, despite joining the Francophone African Financial Community in 1985 and applying to join the Community of Portuguese Speaking Countries (CPLP) in 2007 (Njiale, 2014). Although it is estimated that 85% of the population speak Fang, it has never been recognised as a unifying literary language by being used as an MOI in schools (Leclerc, 2020a). And, whilst Equatorial Guinea went through a long period (1968-1979) where there was no functioning education system, all of its political administrations have been Spanish-speaking. So there have not been the conditions conducive to replacing the high-status language of the country's linguistic market.

8.4 Conclusion

In this chapter I have explored "Opportunistic" MOI policies – a sub-type of the Accommodating MOI policy type. In Opportunistic MOI policies additional languages with high status on the international linguistic market are used as MOI. I used the example of Indonesia's *International Standard Schools* project to show that these Opportunistic MOI policies are usually targeted at a small, élite, portion of the student population and are designed to facilitate the acquisition of high value bilingualism (national language + international language) which is of potential value to the state as well as individual students. I observed that similar *"CLIL-type"* Opportunistic MOI projects are used in many of the new Eurasian countries, even those which I described in the previous chapter as restricting the use of kin-state languages as MOI. Overall, Opportunistic MOI policies contribute to linguistic state-building by promoting the acquisition of additional high-value

languages by students who are already committed to accessing education through the official language. Finally, I contrast the "additional language" acquisition goal of Opportunistic MOI policies with Rwanda's introduction of the option of English-medium secondary education – which had the long-term linguistic state-building goal of removing French from its status as the dominant language of Rwanda's national linguistic market.

9 Conclusion

Inspired by my firsthand experiences of the social impact of school medium of instruction (MOI) policies, I designed this desk-based research study of the MOI policies of 42 countries to answer two questions:

RQ1: What strategies of MOI policy have been adopted by the governments of new states across primary and secondary schooling and how have these changed over time?

RQ2: Can the patterns identified be explained using the concept of national and international linguistic markets?

These two questions are interrelated and cannot be addressed separately. Answering them also requires addressing the unspoken question, "*why do the governments of these states make the MOI policy choices that they do*?" Overall, my answer to these questions is that MOI policy choices need to be contextualised within the international, as well as the national linguistic market. In addition, rather than treating MOI policies as "end goals" in their own right, they need to be understood as forming only part of a state's overall language planning strategy. Informed by these perspectives, I identified four distinctive MOI strategies (Purist, Pragmatic, Accommodating, and Opportunistic) for managing language use within the state-controlled field of school education. Together, they form a novel typology which classifies MOI policies according to the amount and type of language choice which they permit. A key factor identified which influences, but does not determine, MOI policy strategy are traditions of language use established by pre-independence education systems. There is also some evidence that post-1990 MOI policy choices have been influenced by internationally-promoted ideals of equitable access to education, and by globalisation in the form of increased social mobility. However, although these factors may modify MOI policy, they have little impact on a state's overall language planning goals. In this chapter I elaborate on these answers and summarise the theoretical and methodological innovations which this study has generated. I also consider its limitations and potential avenues for future research.

9.1 Claims to new knowledge generated by this thesis

My approach to examining the phenomenon of MOI policy choice and change is distinctive because it focuses on new states and uses a large, longitudinal, sample to provide a global, empirically based, perspective on the choices that new states make for MOI policies in their primary and secondary schools. This gives researchers and advocates of MOI policy change an additional, global, perspective on the factors which influence MOI choice, which they can use to inform and strengthen their own work. My research has generated the following theoretical and methodological innovations.

9.1.1 Theoretical innovation: Extending Bourdieu's concept of the linguistic market

In developing my theoretical framework I drew on the critical sociolinguistics and language planning and policy (LPP) literature (see section 2.7). Core characteristics of which are the treatment of language policies as mechanisms for gaining or maintaining power, and their evolution as part of a historically-situated sociological process – which includes the long-term effects and influence of colonisation (Cassels Johnson, 2013, p. 226; Cassels Johnson & Ricento, 2013, p. 12; Myers-Scotton, 1993). In this respect, it aligns with themes important to the postcolonial theoretical literature concerned with how patterns of power and social organisation established during the empire-building era of the Nineteenth and Twentieth centuries continue to have an influence over the language-in-education policies of ostensibly independent states in the present day (Brock-Utne, 2001; Phillipson, 2012, p. 205; Rizvi, 2015; Romaine, 2013, p. 6; Spolsky, 2018a, 2018b). This is not to say that states are powerless to control or change the MOI policies of their school systems or the patterns of language status within their national linguistic market. Rather, that MOI policies can only be fully understood if they are recognised as being made and implemented within a wider context over which the state has little or no direct control (R. L. Cooper, 1989, p. 163; Kymlicka & Grin, 2003, p. 19; Spolsky, 2004, pp. 6, 217–219).

To accommodate the many influences, both past and present, that may account for a state's MOI policy choices, I have used and extended Bourdieu's model of the social reproduction of the values of linguistic capitals within a linguistic market (Bourdieu, 1986, 1992a, 1992b; Bourdieu & Passeron, 1977). Bourdieu developed the concept of the linguistic market primarily to examine contemporary

issues of language usage and management within a single field - France's domestic linguistic market. I extended Bourdieu's approach in order to consider MOI policy decisions being made within the linguistic markets of multiple states. I visualised these linguistic markets as having permeable borders, and interacting with one another to create a wider, international linguistic market - with any MOI decision made within a particular country being made by policy-makers taking into consideration the status of their official languages relative to other languages outside of, as well as inside, their borders. (Bereday, 1964; Blommaert, 2005, pp. 218–220; Spolsky, 2004, pp. 219–221). This approach was inspired by Blommaert's use of the concept of a global linguistic market in his analysis of how the linguistic capitals of migrants retain or lose their value as those individuals move through the world in the current era of globalisation, which is characterised by increased mobility (Blommaert, 2010). I have adapted Blommaert's globalised perspective which he developed for use in ethnographic sociolinguistics, to suit my macro-comparative approach to exploring the MOI policy choices made for state education systems.

Through my empirical analysis I demonstrated that governments not only shape their education systems to serve their national social and economic system but also to serve their interests as participants in an increasingly globalised world – and that these two requirements do not act in isolation to one another. As well as being used as tools for state-building, MOI policy decisions need to be understood as taking into consideration the country's need to participate in the international economic market and to respond to increased levels of linguistic diversity brought about by migration (Baldauf Jr., 2012, pp. 240–241). They also need to be interpreted in the context of changes to the normalising social and educational standards promoted by transnational bodies such as UNESCO and the World Bank (Rassool, 2007, pp. 257–258). The shaping of educational policy by the interaction of national and international factors is often alluded to in the literature and can also be referred to by policy makers when justifying MOI choices (Ginsburg et al., 1990; C. H. Williams, 2013). However, as I demonstrated in the literature review, there has yet to be an empirically based study with global reach carried out to support these claims. Overall, I show that these models of international best practice can be seen to modify MOI policy approaches, but they do not have any significant impact on the state language planning goals to which they contribute.

9.1.2 Methodological innovation: Qualitative Comparative Analysis (QCA)

QCA is still a relatively young methodology and has not been widely used for education research, so using it makes this study methodologically distinct within the field of comparative education. A systematic review of journal articles published between 1987 and 2018 found 26 articles published in education journals which used QCA methodology and a further 30 articles published in non-education journals which had some relevance to the field of education (Cilesiz & Greckhamer, 2020). Of these just 3 used QCA to carry out cross-national comparisons (Birchler & Michaelowa, 2016; Lauri & Põder, 2013; Toots & Lauri, 2015). The diverse nature of these three studies (educational aid in Africa, and citizenship education and school choice in Europe) is indicative of the potential usefulness of QCA as a tool for comparative education research, whilst the small number of these studies suggests that competence in QCA methodology is not yet widespread within the field of education research.

I believe that categorization (both of case characteristics and outcomes) is a useful tool for comparative investigation, but only if the categorization process is carried out in a thoughtful manner. As well as covering a novel research subject this thesis also has value as an exemplar of how QCA methodology can be applied to unstandardised comparative data. At present there are few detailed discussions of issues related to defining and calibrating QCA case characteristics from qualitative data within the theoretical literature (de Block & Vis, 2017). Rather than relying on the mechanical processes of creating truth tables and deriving Boolean expressions to automatically deliver an "answer" to my research questions, I show how QCA can be used to structure a comparative study, enabling detailed case knowledge of many different country specialists to be combined in a transparent manner, in order to make meaningful comparisons between cases and thus reveal patterns or trends which are not evident when cases are studied in isolation from one another.

A significant driver of the choices which I made to modify the QCA approach to suit the nature of my data was the temporal component to this study (see section 3.5). A recognised limitation of standard QCA is that it is insensitive to concepts of time, which restricts its suitability for analysing the development of policy processes (Fischer and Maggetti, 2017). I use a "Multiple QCAs, Different Time Periods" approach to apply a longitudinal analysis to my data – comparing MOI policies at ten-year intervals, using truth tables constructed from a consistent set

of case characteristics. This strategy for using QCA to analyse how policy processes change over time has rarely been used in empirical studies and I am not aware of it having been used in the field of comparative education (Verweij & Vis, 2021). Therefore this thesis has the potential to make a useful contribution to the wider methodological QCA literature.

9.1.3 Development of a novel MOI policy typology

A significant output from this study was the development of a novel MOI typology which allows the overall MOI strategy of a state-school system (covering both primary and secondary school) to be described in terms of how it contributes to the state's wider language planning aims. Key to the development of this typology was identifying where MOI variation was theoretically significant, and where superficial differences obscured an underlying similarity of purpose. It became increasingly apparent, particularly after my review of pre-independence MOI strategies (see Table 4-2) that the presence (or absence) of some choice or diversity in the languages permitted to be used as MOI provided a more insightful way of classifying and comparing MOI policy choices than attempting to describe MOI policies according to the names, or relative statuses of the languages being used (see section 5.3). I used the term "language choice" to indicate the existence of more than one language route through the state education system. The term "choice" does not imply that individual students have a free choice of which languages they will learn through. Rather, "choice" indicates the existence of official sanction, on paper at least, of the possibility of some variation in the language used as MOI. I used a two-step process to categorise the degree of language choice permitted within each school system.

First, I created two multi-value scales, a five-point scale to measure the degree of language choice available in primary school (see Table 5-3) and a three-point scale for the choice of MOI available in secondary school (see Table 5-4). For both scales, 0 represents no support for any MOI choice and higher numbers indicate increasing availability of MOI choice across school years and/or subjects. To ensure consistent classification and replicability, I created a rubric for each scale point using details from the case data as exemplars. Whilst this is a policy comparison, I used additional case data to refine the application of the classification system if there was evidence of a significant mis-match between policy wording and official support for classroom implementation. The number of levels in each scale was determined by the data and indicates the finest level of

distinction that I felt I could confidently and reliably make. Determining finer graduations for secondary school MOI in particular would have necessitated integrating data on regulations surrounding teaching official languages as compulsory subjects – which is outside of the scope of this project.

I coded primary and secondary MOI policies separately, because in the case data reasons given for, and risks perceived to be associated with, offering MOI choice in these two levels of schooling are quite distinct. Often these differences are related to the relative statuses of the languages involved. In cases coded as having MOI choice in primary school only, it is likely (but not definite) that the languages being used as MOI in early primary school are low-status community languages. In contrast, cases coded as offering MOI choice in both primary and secondary school are more often associated with the accommodation of a community language which has a relatively high status because it is also the language-of-state of another country (a kin-state language). Table 5-5 summarises all of the MOI policy changes I identified, along with their coding on the "degree of choice" scales. Table 5-6 organises these "degree of choice" values longitudinally – so that the MOI policy trajectories of each case can be easily compared.

On its own, this "degree of choice" calibration does not give direct insight into the link between MOI policy and linguistic state-building. To do this, rather than being seen as stand-alone initiatives, policies supporting access to MOI choice in schools need to be understood within the wider context of how they contribute to a state's overall policy of managing its national linguistic market (R. L. Cooper, 1989, p. 97). MOI policies are a "means" not an "end" – whether that "end" is to effectively educate children, contribute to the development of a shared sense of national linguistic identity, enable individuals to acquire high-status linguistic capitals, or some other political goal.

When a language is permitted to be used as an MOI within a state's school system, it can, potentially, lead to the status of that language increasing within that state's national linguistic market. This increase is partly symbolic (recognition that the language is suitable for use in the formal domain of education) and partly due to it increasing the utility of the language – it can be used to "do" education. The higher the level of education that that language is permitted to be used in, the greater the potential increase to its status. This then leads to the question, why would a state allow additional languages to be used as MOI, particularly in

secondary education when doing this could threaten the status of the official language as the dominant language of the national linguistic market? Is the permitting of MOI choice a "soft concession" designed to appease disenfranchised groups, thus contributing to state stability (Ferguson, 2006)? Or, is the ultimate goal of language planners to develop a multilingual model of national linguistic identity where the use of many languages is accommodated in formal domains (see Table 2-1 from Fishman, 1971)? These questions informed my analysis of changes to MOI policy in chapters 6, 7 and 8.

When I examined the distributions of the scores on the primary choice and secondary choice scales I observed that, whilst for many cases their primary choice scores varied considerably over time, secondary choice scores showed much less variation. It was most unusual for a case to move from supporting no MOI choice in secondary school (secondary choice = 0), to offering MOI choice for some or all of secondary schooling (secondary choice = 1 or 2), or vice versa. I also noted that with one exception (Rwanda between 1996 and 2008) MOI choice in secondary school was always accompanied by MOI choice in primary school – but the reverse was not true. These patterns in the MOI choice scores led me to identify three distinct MOI policy strategies, "Purist", Pragmatic" and "Accommodating". The group names reflect my interpretation of MOI policies as contributing to different linguistic state-building strategies I defined the three groups as follows:

•**Purist.** Only the official state language(s) are used as MOI throughout primary and secondary education. There is no (or very little) MOI choice allowed or supported. Primary choice = 0 or 1; secondary choice = 0.

•**Pragmatic.** Community languages are used as MOI in primary schooling but only the official language(s) are used as MOI in secondary school. Primary choice = 2, 3, or 4; Secondary choice = 0.

•**Accommodating.** Community languages (which often have a relatively high status within the international linguistic market) are used as MOI within both primary and secondary school. Or there is some choice in the MOI used for secondary schooling. Primary choice = 0, 1, 2, 3 or 4; Secondary choice = 1 or 2.

The Purist and Pragmatic strategies both work to promote the use of a single dominant language within the high-status formal domain of secondary education. In contrast, the Accommodating strategy enables more than one language to be

used in secondary school and, potentially, to access further education or employment. These MOI strategies are not closed sets and there is evidence in my data set of movement between them (see Table 5-6). Overall, this two-step process classified the MOI policies in my data in a consistent, transparent and replicable manner, which is a key criteria for using QCA effectively with qualitative data (de Block & Vis, 2017). The process allowed me to match the non-uniform descriptors of MOI policy from my data to a set of well-defined, crisp-set, outcome descriptors that could then be explored and interpreted using the concept of managing linguistic markets that shapes this study.

Using this two-stage "degree of choice" classification approach, some information about the relative status of additional languages (in comparison to the official language) can be deduced from the level in the education system where choice of MOI is allowed. However, it does not explicitly identify the different types of languages used as MOI or their relative statuses within the linguistic market. In consequence, the typology does not register when an option of using additional *"international"* languages as MOI is introduced into an education system which already permits some degree of MOI choice. Because of this, I overlaid a fourth MOI strategy grouping over my data, which I labelled "Opportunistic" and defined as:

•**Opportunistic.** A new, high status language (not typically considered to be present in the linguistic market) is introduced as an MOI.

My separation of MOI policies into Purist, Pragmatic, Accommodating, and Opportunistic was not the end point of my analysis. I derived these MOI policy strategies to act as sign-posts within the complex MOI landscape, enabling a clearer exploration of how school MOI policies are used to support national linguistic state-building goals within a wider international linguistic market. In the next three sections I summarise how I used QCA to explore how states with different characteristics use and adapt these strategies to suit their overall linguistic state-building goals.

9.2 Using QCA to analyse change in the Purist and Pragmatic MOI strategies

Purist and Pragmatic MOI policies are two strategies for achieving the same linguistic state-building goal. They support the maintenance or development of a national linguistic market in which only one, official, language is recognised as

being appropriate for use in state-controlled formal domains – represented by the field of secondary schooling. The two strategies differ in whether, or not, they allow other community languages to be used as MOI during the initial years of primary education. In chapter six I used a longitudinal series of standardised QCA truth tables (see section 6.2) to examine factors associated with movement between the use of Purist and Pragmatic MOI strategies, comparing cases in 1965, 1975, 1985, 1995, 2005 and 2015. This movement between using Purist and Pragmatic MOI approaches suggests a willingness to experiment with primary school MOI policy (whether for educational or political reasons). I suggest that this is because variations in the MOI policy of the lower-status field of primary education have less of an impact on patterns of language status within a state's national linguistic market than changes to the MOI policy of secondary schooling – a higher-status field which is more closely tied (through formal educational qualifications) to the fields of employment, higher education, and state administration.

However, there are some community languages which, whilst having no official status in the state, have a comparatively high status within the international linguistic market – often due to being associated with a kin-state (see section 2.5.1). Allowing such languages to be used as MOI, even within the comparatively low-level field of primary education, may be seen as threating the status of a country's official language. This is because learning through that language (as a strategy to acquire high-status linguistic capital) may be seen as more advantageous than following the standard state-school MOI policy. This reasoning explains Eritrea's greater restriction of access to Arabic-medium primary education, compared to the other community languages which it supports for use as MOI in primary school (see section 6.8).

The absence of necessary conditions emerging from this QCA series indicates that neither MOI patterns established before independence, nor the influence of the international linguistic market, nor the global promotion of particular models of MOI best-practice dictate the MOI policy choices of post-independence governments, even though those characteristics are frequently invoked in discussions of MOI policy choice within the academic literature. However, comparing across both longitudinal series, I identified four distinctive patterns which give insight into *why* primary school MOI policies are maintained or changed. They are: a "softening" of traditionally purist MOI policies (see section

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6.7.1); oscillation between Purist and Pragmatic strategies linked to debate over whether Pragmatic MOI policies "help or hinder" the acquisition of international languages (see section 6.7.3); a distinct subset of the purist strategy which uses a "dual language" MOI – teaching using both a national and an international language (see section 6.7.2); and states which experienced "violent transitions" to independence using their MOI policies to support the creation of a new national linguistic identity (see section 6.7.4).

9.2.1 Movement between Purist and Pragmatic strategies to improve the acquisition of the dominant language

The overall increase in "primary choice" scale coding over time (see Table 6-1) suggests that even states with strongly Purist traditions have been influenced, on paper at least, by the EFA-era promotion of the use of community languages as MOI as a strategy for increasing primary school enrolment and attainment (see section 2.5.2). This was an explicitly stated objective of the changes made to the MOI policies of Jamaica (in 2001) and Trinidad and Tobago (in 1999), where Jamaican Patois and Trinidad Creole were recognised and promoted for use as languages of education as a strategy for raising school standards by improving the acquisition of Standard English. Similarly, since the 1989 Francophonie summit, even the governments of some traditionally "Purist" Francophone African states have supported pilot studies of using community languages for supporting the acquisition of French as a second language (la Francophonie, 1989, p. 214) (Albaugh, 2009). In all these cases the ultimate goal is not to raise the status of these community languages by using them in schools, but, rather, to promote a more efficient strategy for training students to become speakers of the state's official language (whether French or English), thus reinforcing its position as the dominant language of the national linguistic market.

Allied to this trend for recommending the use of community languages as MOI in early primary school as a strategy for achieving internationally agreed targets for primary school enrolment and completion, is the promotion of their use as a strategy for increasing state-stability by making education systems appear more inclusive (see section 2.5.2). In 2014, Indonesia's justification for renewed investment in community language MOI schooling in marginalised regions makes explicit mention of the *"social, political and developmental"* as well as educational payoffs that such investment could bring (ACDP Indonesia, 2014). Similarly,

improvements to state-stability in the South of the country were also a driver of the introduction of MOI choice in the Philippines (see section 6.7.2).

However, primary school MOI change has not all been in the direction of increased use of community languages. The many changes to Ghana's primary school MOI policy since the 1990s – moving between the use and exclusion of community languages (see section 6.7.4) serve as an illustration of how arguments both for and against the use of community languages as MOI in early primary school as an effective strategy for eventual acquisition of the dominant language of the state's linguistic market, English, can be used as tools for garnering political support. It should be noted though that none of Ghana's political actors have suggested changing the dominant language of their national linguistic market – they have merely made changes to the process by which that language is to be acquired.

9.2.2 Creating "dual language" national linguistic identities

There are six countries which use a distinct variant of the Purist MOI strategy to promote the uniform acquisition of two languages by all citizens. I termed this a "dual language" approach to linguistic state building. It is designed to create an "authentic" national linguistic identity for the independent state, whilst at the same time promoting the acquisition of a high-status international language. There is no MOI choice and the two target languages are used as MOI for distinct parts (academic year or subject) of the education process. This approach is used by countries with high (Tanzania, Timor Leste, Philippines), medium (Botswana) and low (Lesotho and Rwanda) linguistic diversity.

The dual language approach is a reminder that the attributes of the socially defined concept of "the nation" and the politically defined "state" were merged in the construction of the meme that the use of a (preferably unique) shared language is necessary for state stability (see section 2.1). This is seen in the case of Tanzania (see section 6.7.2) where the post-independence education policy of using Kiswahili as the language of mass primary education and providing restricted access to English-medium secondary education was intended to promote a shared, authentic, African national linguistic identity whilst maintaining competence in the, internationally useful, colonial language, English. To promote the acquisition of Kiswahili, no other community languages were permitted to be used as MOI in state schools. From the mid- to late-Twentieth Century Tanzania's poverty and low levels of political freedom contributed to the success of this dual

language linguistic state-building project. However, in the Twenty-first century, increased access to private, English-medium primary education has the potential to weaken the status of Kiswahili within Tanzania's national linguistic market. In section 9.5.2 of this chapter, I consider in more depth the potential impact of private education on the effectiveness of using state-schools as tools for linguistic state-building.

9.2.3 Remaking national linguistic markets

I was drawn to investigating the MOI policies of new states as the act of becoming independent creates the potential for a moment of rupture and the opportunity to remake social structures. However, the governments of the majority of the pre-1990 cases in this study have chosen to use the MOI policies of their state-school systems to maintain the patterns of language use and status established by their pre-independence administrations. Amongst the Purist and Pragmatic cases there are five exceptions to this – all countries which experienced violent transitions to independence (see section 6.7.3). The new governments of Indonesia, South Korea, Namibia, Timor Leste, and (to a lesser extent) Eritrea used MOI policies, to support their language planning goals of remaking their linguistic markets by removing or reducing the use of languages associated with the pre-independence power in formal state-controlled domains; and to promote the acquisition and use of the new official languages so that its official status would not be merely symbolic (Kymlicka & Grin, 2003, p. 25) (Bourdieu & Wacquant, 1992, pp. 94–114). Where necessary, additional language legislation was implemented to support the effectiveness of these MOI changes. For example, Indonesia promoted the acquisition of its new national language, bahasa Indonesia, using a Pragmatic MOI strategy. But it supported this by banning Dutch (in 1957) and Chinese (in 1967) print media – higher status languages which had the potential to act as obstructions to the acceptance of bahasa Indonesia as the dominant language of education and social opportunity (see section 8.1). These five countries are not the only ones to use MOI policy as a tool for remaking their linguistic markets after independence. In chapter 7 of this thesis I explored how the post-1990 new Eurasian states used and adapted Accommodating MOI strategies to achieve similar goals.

9.3 Managing Accommodating MOI policies within an international linguistic market

The Accommodating MOI strategy differs significantly from the Purist and Pragmatic strategies in that it supports the use of more than one language as MOI in secondary education. The use of an Accommodating MOI policy implies that, within the national linguistic market, two or more languages are accepted (either as a result of legislation, or through established patterns of usage) for use in high-level fields. In chapter 7 I used QCA to compare the post-independence MOI choices of a subset of 14 new Eurasian states whose pre-independence administrations all used Accommodating MOI policies (see sections 4.5.5 and 4.5.6). After independence many of these states introduced legislation to establish new official languages and change the patterns of language status within the national linguistic market. This, both symbolically and practically, supported the movement of political and economic power within the state from groups associated with the old colonial regime, to those associated with the new political regime (Blommaert, 2005, pp. 219–220). The purpose of this QCA was to explore why, after independence, some of these states maintained fully Accommodating MOI policies, whilst others made restrictions to the amount of MOI choice supported within their state-school systems.

As the states in this subset were formed at the beginning of the 1990s they have comparatively short post-independence histories. Rather than creating a longitudinal series of truth tables, I analysed their MOI change by contrasting the degree of MOI choice permitted in 2015 with that available shortly after independence. These MOI policy trajectories are summarised in Table 7-1. To do this, I defined a new MOI outcome set "very Accommodating" (VACC) to differentiate between cases which did (vacc = 0) and did not (VACC = 1) restrict the amount of MOI choice available to their secondary school students.

Although the governments of these states had the political authority to make MOI policy changes for their state-school systems, those changes would only be effective if they (and their consequences for the linguistic market) were accepted by all groups (see section 7.2). I used the concept of acceptance of, or resistance to, language status change to unpack the patterns of MOI change revealed by my analysis. The majority of the non-official languages used as MOI in the secondary school systems of these cases are languages associated with kin-

states (see section 2.5.1). Therefore I generated a truth-table (Table 7-3) using characteristics to represent the influence of factors from outside as well as inside the states on MOI choice, including membership to two regional bodies, the European Union (EU) and the Eurasian Economic Union (EAEU) (see section 7.2.1).

Post-QCA interpretation of the conservative Boolean solution generated from this truth table showed that there were two significant drivers of post-independence change to Accommodating MOI policies: the strength of the state's official language within its national linguistic market (represented by the case characteristic LANG); and the nature of diplomatic and economic relationships with the pre-independence power.

9.3.1   Restricting MOI choice to protect the status of official languages

Comparing the MOI trajectories of rich democratic countries which are members of the European Union (rows #1 and #3 of Table 7-3) showed that in states with strong economies, where the national language is well-established as the dominant language of the national linguistic market (Slovenia, Croatia, Czech Republic, Lithuania, LANG = 1) policies to encourage members of ethnic minorities to use official language MOI schooling have a more persuasive than coercive character. Full MOI choice is still offered but all students have the opportunity (but are not compelled) to learn using the country's official language as their MOI. The combination of the widespread use of the official language within a strong national economy may lead parents from minority language community groups to feel that there is a potential economic advantage to their children learning through the state's official language, rather than their own community language – so they do not have to be compelled to make this choice (T. Bulajeva & Hogan-Brun, 2008; Hogan-Brun & Ramonienė, 2003; Hogan-Brun & Ramoniene, 2005).

In contrast, in states where the position of the national language is considered by policy makers to be less secure (Estonia, Latvia, Slovakia, lang = 0), despite the country's strong economy, there is less incentive for parents to switch from a community language MOI policy (particularly when that language is associated with a strong kin-state) to using the official language (which may well have a lower status within the external linguistic market) as doing so may not be seen as offering any additional potential economic or social advantages. In states such as these MOI policies are more coercive, making the use of the official language

compulsory for at least some school subjects. For these latter cases, I demonstrated that the need to comply with pro-multilingualism European Union social policies as part of the process of joining the EU resulted in a softening of restrictions to the use of minority languages as MOI (Solska, 2011) (Schulze, 2017). This EU influence, which is aligned to the post-1990 global turn towards promoting language equity in education (see section 2.5.2) makes it unlikely, even in countries where the status of the official language is weak, that the use of community languages as alternative MOI will ever be removed completely from the state education system (Solska, 2011).

9.3.2 Retention or restriction of MOI choice is influenced by relationships with other states

When comparing the MOI policy trajectories of the "rich and democratic" EU member states I used the relative, international, status of the state's official language compared to that of languages used by other community groups as an explanatory tool. In doing this I viewed the international linguistic market as resulting from the sum of all countries' language planning actions, but not directly tied to the actions of any one particular country. In contrast to this, there are some ex-Soviet states whose decisions to retain or reduce the use of the language of colonial power, Russian, are directly influenced by their post-independence economic and diplomatic relationships with the Russian Federation. In section 7.3.3 I show how knowledge of the varying levels of economic and cultural dependency on the Russian Federation by the ex-Soviet states of Kazakhstan, Kyrgyzstan, Belarus, and Tajikistan can be used to enhance understanding of differences in their strategies for legislating for the continued use of Russian as an MOI. An extreme example of this is the recent changes that Ukraine has made to its, previously Very Accommodating, MOI strategy. In section 7.3.2 I stepped outside of the timeframe of this study to examine Ukraine's 2017 Law on Education – adopted after Russia's annexation of Crimea in 2014. This policy restricts the use of most languages other than the official language, Ukrainian, as MOI in secondary education , but has the harshest impact on the use of the Russian language (The Law on Education, 2017a)   (Tulup, 2017). International reactions to this domestic language-in-education policy (not only from Russia) illustrated the vested interest that kin-states have in promoting the use of their official languages beyond their own borders.

My descriptions of *why* and how Accommodating MOI policies have been maintained or restricted have shown that the linguistic state-building goals of even the most nationalistic of states have been made within a context of managing expectations, from both within and outside of the country, for continued access to education through community languages. There is one significant exception to this, Turkmenistan – which completely eliminated the use of all non-state languages as MOI within its state-school system (see section 7.3.4). Oil-rich Turkmenistan's removal of all choice of MOI from its education system was made possible by its authoritarian style of government, which suppressed all dissent from the population, and its economic independence which freed it from the need to make language policy concessions to ensure good relations with kin-states or transnational bodies. A key move in the creation of Turkmenistan's single-language educational field was the announcement in 2004 that foreign diplomas issued after 1993 would not be recognised within Turkmenistan – so employment became dependent on participation in the state-school system (Clement, 2018, pp. 145–157; Fierman, 2009) (Clark et al., 1997, p. 318; Clement, 2018, pp. 142–144) (Meredova, 2013). The effectiveness of this act (which resulted in the closure of private schools in Turkmenistan) acts as a reminder that it is by controlling access to academic qualifications (and thus future social and economic opportunity) that MOI policies gain their power as tools for linguistic state-building. By acting as a counterfactual case, the actions of closed and authoritarian Turkmenistan adds weight to the argument driving this thesis that state-school MOI policies need to be interpreted in the light of patterns of language status within the wider, international linguistic market, as well as the internal national linguistic market of a country.

However, the potential economic utility of a language cannot be separated from its identity-signalling role as a marker of membership to a community. Outside of the main truth table analysis for this chapter, in section 7.4 I describe how New Zealand took the unusual decision (unique within this dataset) of adopting a new Accommodating MOI policy – offering a choice of using Māori or English as MOI – as part of an overall social and political strategy for increasing state stability by giving formal support to Māori rights (N. Benton, 1989; R. A. Benton, 2015; New Zealand. Manatū Taonga Ministry for Culture and Heritage, n.d.; Thrupp, 2001). The action of New Zealand – transitioning from a Purist to an Accommodating MOI strategy - demonstrate that these are not closed categories. Movement

between them is possible, but the inclusion of more community languages within the high-level domain of secondary education MOI needs to be seen as being politically advantageous for it to occur. This is the case in North Macedonia where, despite the relatively small number of citizens who consider the official language, Macedonian, to be their first language (lang = 0) the country has retained a very Accommodating (VACC = 1) MOI policy, Full MOI choice is retained as a "soft language right" strategy to reduce inter-ethnic tension (thus increasing state-stability), even though doing so weakens the status of the official language (see section 7.3.2).

9.4 Interpreting Opportunistic MOI policies within a linguistic state-building framework

The boundaries of nearly all national linguistic markets are permeable and the relative utility of languages within them can be influenced by political and economic relationships with other countries and the movement of people (Blommaert, 2010, Chapter 2). In consequence, for a growing number of students, their future social and economic opportunities (and, by extension, those of the state) appear to be dependent upon being able to use other, internationally useful, languages in addition to achieving fluency in their state's official language. I developed the Opportunistic MOI type to describe language-in-education policies which have crossed the divide between teaching an economically useful language as a subject and using it as an MOI – in addition to, or instead of, the state's official language(s).

I defined an MOI policy as being "Opportunistic" if, a new, high-status language (not typically considered to be present in the linguistic market) is introduced as an MOI after independence, particularly for student-groups that have traditionally used the state's official language as their sole MOI. This definition is less robust than those for the other MOI strategies, as determining whether a language being introduced as an MOI is "new" or "high status" is a subjective decision which needs to take into account many case-specific factors. However, this Opportunistic approach to MOI policy can be clearly seen in Indonesia which, at the beginning of the Twenty-first Century added an international-facing Opportunistic aspect to its well-established Pragmatic-type MOI policy (see section 8.1).

Indonesia's introduction in 2007 of the International Standard Schools (ISS) pilot project opened up in state-schools a possibility, which had existed in the private-school sector since the 1990s, of studying through an internationally accredited curriculum (in addition to the standard Indonesian national curriculum) and using high status international languages (predominantly English) in addition to the official language, bahasa Indonesia, as MOI (Coleman, 2011a). This transition from promoting the acquisition of the economically useful linguistic capital of English by teaching and examining it as a compulsory school subject, to using it as an MOI appears, on the surface, to be at odds with Indonesia's carefully nurtured linguistic state-building project which used a tightly controlled Pragmatic MOI policy to make bahasa Indonesia the dominant language of its highly diverse national linguistic market. However, it needs to be remembered that most MOI policies are designed to contribute to an ultimate state-building language planning goal of ensuring that a country's official language is the dominant language of the national linguistic market – a status which is achieved when the official language's use is expected and uncontested in all high-level formal domains. Their aim is not (apart from in the most oppressive of circumstances) to remove the use of all other languages within the country as whole.

Indonesia's "Opportunistic" MOI policy route for its state-school sector provides restricted access to bilingual (official + international language) education, through academically selective schools, to an élite group of Indonesian students who would be expected, due to their family background, to already be competent users of bahasa Indonesia. This potentially promotes a form of high-level multilingualism which is compatible with both linguistic state-building and the acquisition of competency in an additional, high-status language. The achievement of this type of multilingualism, which works on the assumption that international linguistic capital is being acquired *in addition to* competence in the official language is different to the management of Accommodating MOI strategies discussed in chapter 7. In those the state-language planning goal, (for minority community groups) is to develop (community + official language) bilingualism, where competence in the official language is added to the students' linguistic repertoire.

Although the use of Opportunistic MOI policies as a foreign language acquisition strategy is not new (Dvorjaninova & Alas, 2018; Stevick, 2015a), discussion of the use, and social and educational impact, of Opportunistic MOI strategies within

the academic literature has increased in the Twenty-first Century (Díaz Pérez et al., 2018; Hanesová, 2015). In this era of increased global mobility, particularly in countries where the official language has a relatively low status within the international linguistic market, the dominant status of the official language within a national linguistic market may be threatened if enough citizens feel that they (or their children) would have more social and economic opportunities from learning through languages other than (or in addition to) the language-of-state. The Opportunistic MOI strategy caters to the aspirations of this élite by offering them the chance to learn through an international language but maintains the status of the national language by making high academic performance (which is presumably dependent upon fluency in the national language) a requirement for entry to the programme. Of course, this strategy will only be compatible with linguistic state-building if it is structured in such a way that significant use of the official language as part of state-schooling cannot be avoided.

9.5 Limitations to this study

This study, which had the goal of exploring the role of state-school MOI policies as tools for linguistic state-building has two significant limitations. The first is that it compares policy, not practice; and the second it that it does not formally address the impact of private-schooling. In this penultimate section I review these two issues

9.5.1 Advantages and disadvantages of policy studies

To answer my research questions, which involve exploring MOI trends on a global scale, I made the pragmatic decision to carry out a desk-based comparison of MOI policy. Whilst the way in which MOI policies are implemented and supported in classrooms cannot be assessed from policy documents alone, it is important to understand that policies have power, even when they are not wholeheartedly implemented (Cassels Johnson, 2013, pp. 54, 75; Williams, 2013, p. 296). School MOI policies are a tangible expression of a state's formal linguistic identity and the roles that other languages are permitted to play in relation to this in state-controlled domains (Blommaert, 2005, pp. 215–8). They set the "rules of the game" for the field of education – determining which linguistic capitals it is necessary to possess in order to participate fully – and form the context against which attitudes towards particular languages and their speakers are formed (Ball, 1993; Tollefson & Tsui, 2014).

The global policy comparison goal of my analysis entailed the sacrificing of intimate case knowledge, but did not mean that cases were treated in a superficial manner. By gathering data from a diverse range of high-quality sources, using (where necessary) information on classroom practices to adjust my classification processes, and presenting case-studies of selected countries to elaborate on my findings, I ensured that my analysis was accurate and meaningful. The global perspective on MOI policy choice produced by this study is not intended to replace detailed, fieldwork-based case-studies, rather its aim is to provide an additional perspective against which such work can be carried out.

As a result of my research process I produced a comprehensive summary of the MOI policy changes made by the 42 cases in this study (see section 5.6) and generated a country-by-country bibliography of the sources which I consulted to do this (see section 11). Both of these may serve as useful reference sources for other researchers interested in comparing MOI policy change as they contribute to the updating of similar databases, such as that published by Kaplan and Baldauf Jr. in 1997.

9.5.2 Considering the impact of private-schooling

In this thesis I have presented state school systems as being effective tools for linguistic state-building because they make access to the potential social and economic opportunities that formal educational qualifications can provide dependent upon learning and using the language of state. However, many countries have significant private-school sectors – so the state does not have full control over access to education. Did not including private schooling in my formal analysis weaken my findings?

I would argue that it did not. Whilst my formal QCA comparison of MOI policies focused on state-schools, I used my wider case knowledge to interpret the patterns of MOI policy revealed by my truth tables by considering potential threats to linguistic state building – including the presence of, and regulations pertaining to, private schooling. From doing this, I concluded that private schooling has a detrimental impact on linguistic state-building only if it provides a pathway through a country's education system using a language other than the language(s) of state.

Where the Purist or Pragmatic MOI strategy is used, an increase in private schooling only threatens linguistic state-building in countries which have a dual

language MOI strategy. I illustrated this by comparing Tanzania with Kenya and Uganda (see section 6.7). In all three countries both English and Kiswahili have official status in the constitution, but the two languages are used, taught and examined differently within their state primary schools. In Tanzania Kiswahili is used as the sole MOI throughout primary education, English is taught as a compulsory subject, and both languages are compulsory subjects for Tanzania's Primary School Leaving Examination. In Kenya and Uganda, English is the sole MOI from grade 4 and Kiswahili is taught as a compulsory subject. But, whilst both languages are examined for the Kenyan Certificate of Primary Education, only English is examined for the Ugandan Primary Leaving Certificate (Amone, 2021; Ssentanda, 2022; UNESCO-IBE, 2010a, 2010b, 2010c).

In the first two decades of the Twenty-first Century all three countries have seen an increase in the proportion of primary school students educated in fee-paying private schools. In Kenya, this proportion has risen from 4% in 2005, to 16% in 2014; in Uganda, from 12% in 2008, to 20% in 2017; and in Tanzania, from 1% in 2005, to 3% in 2015 (World Bank, n.d.-b). With the exception of an élite minority, the majority of fee-paying primary school students are in private schools which prepare students to take the country's national primary school leaving examinations (Alcott & Rose, 2016; Oketch et al., 2010).

Although Tanzania has the smallest proportion of students attending private schools, it is here that private education has the more significant impact on the country's use of education as a tool for linguistic state-building. This is because Tanzania uses a dual language MOI policy – using Kiswahili as the sole MOI in state primary schools and English as the MOI of secondary school (see section 6.7.2). Allowing the development of a parallel, fee-paying, English-medium primary education system whose graduates could still take the Tanzanian Primary School Leaving Examination, created an econo-linguistic divide, with richer families able to opt-out of the use of Kiswahili as an MOI (Qorro, 2013; Shank Lauwo, 2020). Although if they wish to take the Primary School Leaving Examinations, fee-paying students still have to learn Kiswahili as a subject, it is not necessary for them to use Kiswahili to learn other subjects. This weakens the role of Kiswahili as a shared language of education for all Tanzanians, and reinforces the dominant status of English within the national linguistic market. This situation is neither particularly new, not unique to Tanzania. In 1977, when Botswana introduced a dual language MOI policy of using Setswana as the MOI

for the first four years of primary school (with English as the MOI for all higher grades), it was agreed that private schools could continue to use English as the MOI for all year groups. Again, supporting the impression that education through a higher status, international language was preferable to education through the shared national language (Botswana National Commission on Education, 1979). In contrast, in Kenya and Uganda, where English is the MOI of upper primary school in state-schools and Kiswahili is not used as a shared MOI, the expansion of the fee-paying sector does not have a negative impact on linguistic state-building as the private schools are using the same, dominant, language as MOI as the state-schools are. However, this does not mean that the increase in private schooling has no impact on Kenya and Uganda's linguistic markets. In both countries community languages are recommended to be used as MOI in lower primary school (see section 6.7.4). Although there is significant evidence that "mother tongue" based primary education is more effective than learning through an unfamiliar official language; there is a persistent image (established during the pre-independence era, and reinforced by poor investment and training post-independence) of community languages being associated with lower-quality education (Buhmann & Trudell, 2008; Trudell, 2016). If more affluent parents opt-out of community language MOI schooling, by sending their children to (usually) English-medium fee-paying primary schools, this can further reinforce the low status of these community languages within the national linguistic market.

Unlike the Purist and Pragmatic cases, for the countries which use Accommodating MOI policies the greatest "threat" to linguistic state-building is perceived as coming from within, rather than outside of, the state-funded education system (see section 7.3), and the potential impact (and consequent management through MOI policy regulation) of private schools on linguistic state-building appears to be much less significant. This can be seen in Ukraine, where there have been a number of policy initiatives to increase the use of the official language, Ukrainian, as the MOI for all levels of state-education and decrease the use of the ex-colonial language, Russian. Efforts towards this linguistic state-building goal were significantly increased with Ukraine's 2017 Law on Education (discussed in section 7.3.2) which greatly restricted the use of languages other than Ukrainian as MOI in post-primary education (Stormont, 2017). However, the law states explicitly that privately funded schools are free to use any language as their MOI. In 2009/10 (excluding the Crimea) there were nearly 4.5 million

secondary students in Ukraine. Of these, less than half of one percent (20,500 students) were studying in the private sector. 82% of secondary students were studying in Ukrainian-medium schools, 17% in Russian-medium schools, and the remaining 1% in other languages (Romanian, Hungarian, Moldavian, Crimean Tatar and Polish) (UNESCO-IBE, 2011). From this I infer that, compared to the number of students using non-Ukrainian MOI in the state-school sector, the small proportion of private students is perceived as posing relatively little threat to Ukraine's policy aim of establishing Ukrainian as the dominant language of its national linguistic market.

Under all but the most authoritarian of administrations (see section 7.3.4 on Turkmenistan), state-school MOI policies work effectively as linguistic state-building strategies only if the link between participating in state education and future economic and social opportunity is believed in and trusted. Given that MOI policy works with many other aspects of curriculum (including citizenship education, history, and literature) to make state-schooling an effective tool for state-building (educating citizens), I would suggest that it is more useful to consider the wider issue of private schooling's impact on the state's control over access to (high quality) education, than its impact on linguistic state building alone. This involves differentiating between private education which provides alternative access to the national curriculum and national examinations – often when there are not enough state school places to meet demand - and that which offers access to a different curriculum and other, internationally recognised, qualifications.

This difference can be seen in Indonesia, whose education system has always been composed of a diverse mix of state and privately-run schools (see section 8.1). This is still the case today - in the 2022/23 academic year 26% of Indonesia's more than 5 million senior high school (SMA) students were attending private schools supervised by the Ministry for Education, Culture, Research and Technology (BPS Indonesia, n.d.).The vast majority of these private schools provide access to the Indonesian national curriculum and the students attending them will be studying for Indonesian national school qualifications. However, since 1989, Indonesian parents (who can afford it) have been given increasingly more freedom to choose how their children will be educated and the qualifications that they will obtain through this education (Sundusiyah, 2019; Zacharias, 2013).

This does not mean that "international" private schools for Indonesian citizens are free from government control.

In 2014 the Ministry of Education and Culture issued regulations clarifying the operation of foreign education institutions which educated Indonesian citizens. Whilst such (generally high-cost) institutions are able to follow any approved non-Indonesian curriculum, it is mandatory for all students to learn the national language, bahasa Indonesia, and for Indonesian students to also be taught religious studies (Pendidikan Agama) and citizenship (Pendidikan Pancasila dan Kewarganegaraan). These institutions must also organise for Indonesian students to take Indonesian primary and lower secondary national examinations – the papers for which may be translated into English, if necessary – in addition to any international examinations offered by the school (No. 31/ 2014: Article 5 (1 b, c): Article 11 (2, 3); Article 13 (4)) (Indonesia Ministry of Education and Culture, 2014).

Despite these requirements, I would suggest that, by giving Indonesian citizens access to qualifications, such as Cambridge iGCSEs and A Levels and the International Baccalaureate (IB), that are more widely recognised internationally that Indonesia's own national qualifications, these "international" private schools have the potential to weaken the status of the Indonesian education system as a national institution and devalue the qualifications which it controls. Whilst the vast majority of Indonesia's school children will continue to follow the Indonesian national curriculum and take Indonesian national examinations, there will be an awareness that these might not the "best" qualifications for accessing the widest potential range of social and economic opportunities.

To summarise, in this study I have discussed the impact of private schooling where it appears to provide a pathway through a country's education system using languages other than those supported by the MOI policy for state schools. I recognise that it could be of value to carry out an investigation of the impact of private schools on government language policies – particularly with regard to initiatives to increase the use of lower-status community languages in education. However, thinking more broadly, state education systems are viewed as powerful tools for state-building (educating citizens) when acquisition of the national academic qualifications (institutionalised cultural capital) available through them is seen as necessary for accessing future social and economic opportunities (see section 2.2). Where private schooling provides an alternative route to obtaining

these national qualifications, it reinforces their value. However, if private schooling provides access to "international" qualifications (validated by bodies external to the state) it may weaken the status of the national qualifications in particular, and the national education system more generally - because the national qualifications are no longer the sole form of institutionalised cultural capital available to citizens. The increasing availability to more affluent parents of an "international qualification" pathway for their children's schooling, and the management of such pathways by governments, is a developing area of research (Engel et al., 2020; Wu & Koh, 2022, 2023). and it would be of interest to compare how different countries manage this issue.

9.6 Considering opportunities for expanding the scope of this study and its findings

As with most qualitative methodologies, rather than seeking a solution which is generalisable to a wider population, the aim of a QCA is to find a solution which gives good insight into all of the cases included within the analysis (Goertz and Mahoney, 2012, p. 46). Such solutions must be understood as having a number of necessary conditions attached to them – defined by the scope conditions used to select cases (see section 3.9). I now consider the potential for extending this study by relaxing these scope conditions and applying the analytical approach and MOI policy typology which I have developed to a wider population of cases. I used six scope conditions (see section 4.1) to identify the 42 cases included in this study: time period of interest; date of independence; state and religion; system of governance; population size and state stability.

The purpose of the first two scope conditions was to establish the temporal boundaries of this study and to identify cases which were theoretically relevant to my research interest (see section 2.5.1). I chose to compare the MOI choices of new states because the act of becoming politically independent creates a potential moment of rupture – an opportunity to "change the rules" that structure social institutions. For administrative convenience, I only included states which became independent after 1945. Since independence is not a point event where, before that date all social policy is decided by the metropolitan power, and afterwards the pre-independence power has no influence on MOI policy choice, I feel that it would be plausible to expand this study by including countries with earlier dates of independence. Whilst "independence" is not the only source of

political rupture (see section 8.3 on Rwanda, or section 7.3.2 on Ukraine), the complete removal of the requirement that cases were previously part of a larger political entity would need careful consideration.

The purpose of the final four scope conditions was to increase the homogeneity of the sample. My analysis suggests that some of these conditions could be dropped or modified to allow the inclusion of a wider range of cases. For example, I found no direct connection between MOI policy and population size. Instead, the status of official languages within the wider international linguistic market and enduring relationships of dependence (both economic and diplomatic) with ex-colonial powers were more important. So, I would feel confident that dropping the requirement that cases should have a population larger than 1 million would still result in the selection of a theoretically relevant sample.

Although not included in this study, my development of the concept of Opportunistic MOI policies was informed by my professional experience of working to support the use of English as an additional MOI for science in Abu Dhabi's state-funded schools. I was struck by the measures that were put in place to maintain the official status of Arabic as the dominant language of the national linguistic market (Dickson, 2012; Mohamed & Morris, 2021). Relaxing the "no state religion" scope condition (see section 4.1.3) would allow for the inclusion of many of the Gulf states and potentially enrich analysis of the drivers of modifications to Accommodating and Opportunistic MOI policy types. However, Abu Dhabi is in federation with six other states as part of the United Arab Emirates. Although each state has its own department of education, which each have freedom to regulate education within its boundaries, all of these state education departments are subservient to the national department of education which, amongst other things has control over the senior high school curriculum – including the language used for authorised textbooks and high school leaving examinations. In section 7.1.1 I justified my exclusion of Cameroon from my analysis of Accommodating MOI policies by showing that, whilst formally a unitary state, its MOI policy is still federal in character – and thus qualitatively different to the MOI policies of the other Accommodating cases. Given my knowledge of the characteristics of MOI policy in the UAE and Cameroon (as well as in the former Yugoslavia and Czechoslovakia) I still believe that the MOI policies of federal states need to be analysed separately to those of unitary states in order to accommodate the "nested" nature of control over their MOI policies.

The adjustments to case selection strategies discussed in this section have the potential to increase the generalisability of my research findings through wider application of the model of four MOI policy strategies and the interpretation of linguistic state-building MOI choice from the perspective of the wider, external, international linguistic market.

10 References

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12 Appendices

12.1 States excluded from study

These are the countries which were not included in this study. States were excluded by applying scope conditions in a step-wise fashion, as described in Chapter 4. Once a state was excluded, it was not considered again, so each excluded state appears in the table once only.

Was not formed after WW2

Afghanistan, Albania, Andorra, Argentina, Australia, Austria, Belgium, Bolivia, Brazil, Bulgaria, Canada, Chile, Columbia, Costa Rica, Cuba, Denmark, Dominican Republic, Ecuador, El Salvador, Ethiopia, Finland, France, Greece, Guatemala, Haiti, Honduras, Hungary, Iraq, Ireland, Italy, Japan, Lebanon, Liberia, Lichtenstein, Luxembourg, Mexico, Monaco, Mongolia, Nepal, Netherlands, Nicaragua, Norway, Oman, Panama, Paraguay, Peru, Poland, Portugal, Romania, San Marino, Saudi Arabia, South Africa, Spain, Sweden, Switzerland, Thailand, Turkey, UK, USA, Uruguay, Venezuela

Has a state religion with special status

Algeria, Bahrain, Bangladesh, Brunei Darussalam, Cambodia, Comoros, Djibouti, Egypt, Iran, Israel, Jordan, Kuwait, Libya, Malaysia, Malta, Mauritania, Morocco, Myanmar (Burma), Pakistan, Qatar, Somalia, Sri Lanka, Syria, Tunisia, UAE, Yemen

Federal states

Bosnia and Herzegovina, Germany, India, Micronesia, Nigeria, Russian Federation, Saint Kitts and Nevis

States with significant autonomous regions

Armenia, Azerbaijan, Cyprus, Georgia, Republic of Moldova, Serbia, Uzbekistan

Communist states and single party states

China, Lao, Vietnam, North Korea

Non-parliamentary constitutional or absolute monarchies

Bhutan, Swaziland (eSwatini), Tonga

Small states with a population of less than 1 million

Antigua and Barbuda, Bahamas, Barbados, Belize, Cabo Verde, Dominica, Grenada, Fiji, Guyana, Iceland, Kiribati, Montenegro, Maldives, Marshall Islands, Nauru, Solomon Islands, Suriname, Palau, Saint Lucia, Saint Vincent and the Grenadines, Samoa, Sao Tome and Principe, Seychelles

Fragile states with a FSI P2 (Public Services) indicator ≥ 9

Central African Republic, Chad, Congo, Democratic Republic of the Congo, Guinea, Guinea Bissau, Malawi, Mozambique, Niger, Papua New Guinea, Sierra Leone, South Sudan, Sudan, Zimbabwe

12.2 Case characteristics at independence

Table 12-1 below summarises factors which I investigated during my analysis as possibly explaining MOI choice. Factors which I used in my final analysis are discussed in more detail in the main text.

Key to table headings

Country: case name with ISO country code

Indep: latest date of independence

Pre-indep: either the country which the case gained independence from, or the name of the state which the case seceded from

Other C20: any other pre-independence powers which controlled the case in the twentieth Century (indep = case was independent for more than 3 years)

Literacy: literacy rate at independence (%)

Occupied: the case was occupied by a different power during WW2

Violent: the transition to independence involved significant violence

Ling-frac: index of linguistic fractionalization

Country	Indep	Pre-indep	Other C20	Literacy	Occupied	Violent	Ling-frac
Indonesia IDN	1945	NLD		6.75	yes	yes	0.816
Philippines PHL	1946	USA	ESP(1898)	58.5	yes	no	0.849
New Zealand NZL	1947	GBR		98.5	no	no	0.291
Republic of Korea (South Korea) KOR	1950	JPN	KOR	37.5	no	yes	0.008
Ghana GHA	1957	GBR	DEU	26	no	no	0.858
Benin BEN	1960	FRA		3.9	no	no	0.924
Burkina Faso BFA	1960	FRA		2.6	no	no	0.721
Côte D'Ivoire CIV	1960	FRA		5	no	no	0.902
Gabon GAB	1960	FRA		12	no	no	0.846
Senegal SEN	1960	FRA		6	no	no	0.778
Togo TGO	1960	FRA	DEU	10	no	no	0.905
Cameroon CMR	1961	FRA, GBR	DEU	20	no	no	0.975
Rwanda RWA	1961	BEL	DEU	17	no	yes	0.09
Tanzania TZA	1961	GBR	DEU	13	no	no	0.88
Jamaica JAM	1962	GBR		83	no	no	0.017
Trinidad and Tobago TTO	1962	GBR		93	no	no	0.597
Uganda UGA	1962	GBR		36	no	no	0.93
Kenya KEN	1963	GBR		26	no	yes	0.927
Zambia ZMB	1964	GBR		44	no	no	0.828
Gambia GMB	1965	GBR		16	no	no	0.776
Singapore SGP	1965	GBR	Malaya	62	yes	no	0.773
Botswana BWA	1966	GBR		35	no	no	0.397
Lesotho LSO	1966	GBR		59	no	no	0.091
Equatorial Guinea GNQ	1968	ESP		45	no	no	0.284
Mauritius MUS	1968	GBR		64	no	no	0.216
Croatia HRV	1990	YUG	AHG	96	yes	yes	0.104
Namibia NAM	1990	ZAF	DEU	75	no	yes	0.789
Belarus BLR	1991	SUN	TSR	98	yes	no	0.382

Country	Indep	Pre-indep	Other C20	Literacy	Occupied	Violent	Ling-frac
Estonia EST	1991	SUN	TSR, indep	100	yes	no	0.471
Kazakhstan KAZ	1991	SUN	TSR	98	no	no	0.514
Kyrgyzstan KGZ	1991	SUN	TSR	98	no	no	0.459
Latvia LVA	1991	SUN	TSR, indep	100	yes	yes	0.534
Lithuania LTU	1991	SUN	TSR, indep	99	yes	yes	0.416
North Macedonia MKD	1991	YUG	OTT	93	yes	no	0.495
Slovenia SVN	1991	YUG	AHG	100	yes	yes	0.116
Tajikistan TJK	1991	SUN	TSR	98	no	yes	0.276
Turkmenistan TKM	1991	SUN	TSR	98	no	no	0.457
Ukraine UKR	1991	SUN	TSR, POL	99	yes	no	0.497
Czech Republic CZE	1993	CSK	AHG	99	yes	no	0.072
Eritrea ERI	1993	ETH	ITA, GBR	34	yes	yes	0.65
Slovakia SVK	1993	CSK	AHG	99	yes	no	0.246
Timor Leste TLS	2002	IDN	PRT	40	no	yes	0.819

Table 12-1 Case characteristics at independence

12.3 Significant events

As well as collecting information on MOI policy changes, I also made note of events and circumstances which might have an impact on MOI choice. Table 12-2 below contains brief notes on issues which I felt **may have implications for MOI policy**. Where appropriate, I have expanded on these issues in the main text.

Key to table headings

"Significant Events" included but are not limited to: civil wars or major civil unrest which has occurred since independence; of major conflicts (political or violent) with other states; entry into or exit from political or economic unions with other states.

"Democratic Freedom" indicates the degree of civil and political freedom enjoyed by citizens. The main source for this data is the Freedom in the World report (Freedom House, 2021).

Political Rights & Civil Liberties: NF= not free, PF = partly free, F = free

"International Funding": WB = Date of first education project funded through the World Bank.(The World Bank, 2021)

EFA = Date of start of participation in EFA Fast Track / Global Partnership for Education initiatives. (GPE, 2019)

Country	Significant Events	Democratic Freedom	International Funding
Belarus	1994: Alexander Lukashenko elected as President – remains in office for period of study 1995: Russian restored as co-official language – closer links to Russia 2004: Beginnings of tension with EU & West	indep: PF 1996: NF	WB: 2015
Benin	1975-1990: socialist regime – one party state 1990: multiparty elections held	1973:NF 1990: PF 1991: F	WB: 1986 EFA: 2004
Botswana	1995: active discrimination against Kalahari bushmen	F 1972: PF (close to F) 1973: F (becoming more authoritarian in C21)	WB: 1976
Burkina Faso	1966: beginning of a series of transitions of government by coup 1987: beginning of Blaise Compaoré's rule 1990: President Blaise Compaoré introduces limited democratic reforms – remains in power until October 2014	PF 1978: F 1980: PF 1984: NF 1992: PF	WB: 1973 EFA: 2002
Cameroon	1972: becomes unitary state 1982: President Biya begins rule 1990-present: English region secessionists	NF 1972: PF (weak) 1976: NF	WB: 1969 EFA: 2006

Country	Significant Events	Democratic Freedom	International Funding
Côte D'Ivoire	1990: opposition parties legalised 1999-2007: civil war	1973: NF 1978: PF (weak) 1988: NF 1989: PF 1993: NF 1999: PF 2002:NF 2012: PF	WB: 1970 EFA: 2010
Croatia	1991-1998: Yugoslav (Serb) invasion 1992-1995: involvement in Bosnia Herzegovina 1999: Nationalist President Tudjman dies 2013: joined EU	PF 2000: F	WB: 2005
Czech Republic	2004: joined EU	always F	0
Equatorial Guinea	1968-1979: President Macias Nguema – education system disintegrated 1979-present: President Obiang Nguema 1985: Joins African Financial Community (Francophonie) 1991-1997: limited, ineffective, democratisation 2003: opposition leaders from self-proclaimed government-in-exile in Spain 2006, 2008: mass resignation of government 2007: begins process to join CPLP (Community of Portuguese Speaking Countries)	NF	WB: 1987
Eritrea	1998-2000: border war with Ethiopia – declared over in 2018 2002: ban on political parties	NF	WB: 1996 EFA: 2013

Country	Significant Events	Democratic Freedom	International Funding
Estonia	2004: joins EU	always 1991: F 1992: PF 1993: F	WB: 1995
Gabon	1964: suppressed military coup 1967-2009: President Omar Bongo 1991: multiparty politics introduced 2010: President Ali Bongo 2012: English declared an official language	NF 1990: PF (weak) 2010: NF	WB:1968
Gambia	1981: coup suppressed 1982-1989:Senegambia – loose federation with Senegal 1994-2016: President Jammeh – increasingly repressive regime	1972: F 1982: PF 1989: F 1994: NF 2001: PF 2011: NF	WB: 1996
Ghana	1964-1992: military rule 1992: multiparty politics reintroduced 1994, 2002-2004: violence in Northern Region	1973: NF 1977: PF 1980: F 1982: NF 1992: PF 2000: F	WB: 1986 EFA: 2004

Country	Significant Events	Democratic Freedom	International Funding
Indonesia	1949: Dutch recognise Indonesian independence 1950: Moluccas Islands 1962: West Papua 1965: failed coup – anti-communist purges 1976: annexation of East Timor 1992-2002: Timor Leste, Aceh 1967-1998: President Suharto 2002: beginning of democratic multiparty politics	1999 1972: PF 1993: NF 1998: PF (stronger) 2005: F 2014: PF (drop in civil liberties)	WB: 1970
Jamaica	1998-1999: increase in violent crime & deterioration of economy	always F	WB: 1966
Kazakhstan	Independence – March 1995: President Nazarbayev, regime becomes progressively more oppressive Regime becoming more repressive	1991: PF 1994: NF	WB: 1995
Kenya	1969: start of restriction on party politics 1982: one-party state formally introduced 1978-2002: President Moi 1991: multi-party politics re-introduced 2007: violence in arid Northern regions 2012: severe electoral violence	1973: PF 1987: NF 1992: PF 1993: NF 2002: PF	WB: 1966 EFA: 2005
Kyrgyzstan	1990, 2010: unrest with Uzbek-Kyrgyz groups in South 2005: Tulip revolution 2010: political revolution	PF 2000: NF 2005: PF 2009: NF 2010: PF	WB: 1994 EFA: 2006
Latvia	2004: joined EU	always 1991: F 1992: PF 1994: F	WB: 1999

Country	Significant Events	Democratic Freedom	International Funding
Lesotho	1970: King sent into temporary exile 1986: South Africa blocks borders, demanding expulsion of anti-apartheid activists 1990: King Moshoeshoe II goes into exile. His son is sworn in as Letsie III. 1991: General Lekhanya forced out by Colonel Elias Tutsoane Ramaema, who lifts ban on political activity. 1993: new constitution 2004: state of emergency declared with appeals for food aid 2007: state of emergency declared – severe drought 2014: Prime Minister Thabane flees to South Africa	1972: NF 1973: PF 1988: NF 1991: PF 2002: F 2009: PF 2012: F 2015: PF	WB: 1974 EFA: 2005
Lithuania	2004: joined EU	always F	WB: 2002
Mauritius		always 1972: F 1978: PF (strong) 1982: F	WB: 1974
Namibia	1998-1999: Caprivi Strip 2005: start of land reforms	always F	WB: 2007
New Zealand	1998: Waitangi Tribunal	always F	0
Philippines	1969-2012: political violence in Southern Provinces 1965-1986: President Marcos – no democratic process	1972: PF 1987: F 1990: PF 1996: F 2005: F (stronger)	WB: 1964

Country	Significant Events	Democratic Freedom	International Funding
Republic of Korea *(South)	1950-1953: Korean War, relations not normalised 1961-1979: rule by General Park 1972-1981: martial law 1988: first free parliamentary elections	before 1988 NF (with some liberalisation), F after 1988	WB: 1969
Rwanda	1963-1994: Huti-Tutsi conflict 1994: Rwandan Genocide 1996-2003: involvement with Burundi, Zaire, DRC conflict	NF	WB: 1980 EFA: 2010
Senegal	1982-1989: Senegambia – a loose federation with the Gambia 1982-2014: Secessionist struggles in Cassamance region	free before 1973: NF 1975: PF (improving) 2002: F 2008: PF 2012: F	WB: 1971 EFA: 2006
Singapore	1963-1965: In federation with Malaysia	always PF with some liberalization from 1980s	WB: 1972
Slovakia	2004: joined EU 2009: minority language laws made more restrictive	PF 1994: F 1996: PF 1998: F	WB: 2005
Slovenia	2004: joined EU	always F	0
Tajikistan	1993: opposition parties banned 1992-1998: civil war (Gorno-Badakhshan Autonomous Region)	1991: PF 1992: NF	WB: 2011 EFA: 2005

Country	Significant Events	Democratic Freedom	International Funding
North Macedonia	1994: Greek trade restrictions over name 2001: near civil-war involving Albanian minority (NATO/EU peacekeeping) 1996: use of Albanian flag restricted 2012-2017 parliament not functioning 2017: name agreed internationally	always F	WB: 1994
Timor Leste	2006-2012: civil conflict	PF(improving political rights from 2003)	WB: 2000 EFA: 2005
Togo	1963: violent coup 1967-2005: President Eyadema, one party rule early 1990s – 2004: EU broke aid ties 1991: multi-party democracy restored on paper	NF 1999: PF 2002: NF 2007: PF	WB: 1980 EFA: 2010
Trinidad and Tobago		always F 2001: PF (strong) 2005: F	WB: 1968
Turkmenistan	1991-2006: President Saparmurat Niyazov 1993-2003: dual-citizenship agreement with Russia (cancelled in 2003) 2007-present: President Kurbanguly Berdymukhamedov 2008: beginnings of multiparty politics (highly restricted)	1991: PF 1992: NF	0
Uganda	1971-1979: Idi Amin 1980-1986: political instability 1986: President Museveni elected (elections but no effective party politics) 2002 onwards: Lord's Resistance Army active	1973: NF 1980: PF 1991: NF 1994: PF 2014: NF	WB: 1967 EFA: 2011

Country	Significant Events	Democratic Freedom	International Funding
Ukraine	2004: Orange Revolution 2014-present: Crimea - Russia	always PF 2005: F 2010: PF (high)	WB: 1996
Tanzania	1967: start of Socialist Self-Reliance 1977: one-party politics 1978-1979:conflict with Uganda 1992 multi-party politics 2001-present: Zanzibar unrest	1972: NF 1995: PF	WB: 1963 EFA: 2013
Zambia	1964-1991: President Kaunda 1972-1991: one party state	1972: PF (v.restricted) 1991: F 1993: PF (closer to F)	WB: 1969 EFA: 2008

Table 12-2 Significant events related to MOI policy for cases since independence.

12.4 Data frames used for longitudinal analysis

From the documentary sources which formed the data for this study, I compiled six data frames, one for each of the longitudinal waves of analysis that I carried out. These frames were then used to construct the truth tables used in my analysis. Details of crisp-set calibration decisions are included in the main text.

Key to table:

ISO: country code

indep: date of independence

age: "age" of state – number of years since independence

LITC: current literacy rate (%)

pop: population size

income: World Bank income band (0 = low income, 1 = lower-middle, 2 = upper middle, 3 = high income)

ADEM: since independence, the country has always been democratic (Freedom House rates it as "free" or "partly-free")

CDEM: the country is currently democratic (Freedom House rates it as "free" or "partly-free")

CCON: the country is currently involved in a conflict (internal or external)

PCON: since independence the country has been involved in a significant period of conflict

choice_p: amount of MOI choice supported in primary school (see chapter 5)

choice_s: amount of MOI choice supported in secondary school (see chapter 5)

DUAL_MOI: a national language, other than the dominant MOI is used as a compulsory MOI at some stage (or for some subjects) by the majority of students

INTL_MOI: the dominant MOI is a language with high status within the international linguistic market

ling-frac: index of linguistic fractionalisation

PRE_P_max: maximum amount of MOI choice in primary school allowed by pre-independence MOI policy

PRE_S_max: maximum amount of MOI choice in secondary school allowed by pre-independence MOI policy

HPUR: in the Twentieth Century, the pre-independence administration did not support MOI choice in primary schools

HPRA: in the Twentieth Century, the pre-independence administration allowed some choice of MOI in primary schools, but not in secondary schools

HACC: in the Twentieth Century, the pre-independence administration allowed some choice of MOI in both primary schools and secondary schools

LITI: literacy rate at independence (%)

MIXED: before independence, the country had a change of administration during the Twentieth-century

WW2: the case was occupied by a different power during WW2

VIOLENT: the transition to independence involved significant violence

MOI_CH: at independence there was a change of dominant MOI

ISO	indep	age	LITC	pop	income	ADEM	CDEM	CCON	PCON	choice_p	choice_s	DUAL_MOI	INTL_MOI	ling-frac	PRE_P_max	PRE_S_max	HPUR	HPRA	HACC	LITI	MIXED	WW2	VIOLENT	MOI_CH
BEN	1960	5	7	2632356	0	0	0	0	0	0	0	0	1	0.924	0	0	1	0	0	3.9	0	0	0	0
BFA	1960	5	5	5174870	0	1	1	0	0	0	0	0	1	0.721	0	0	1	0	0	2.6	0	0	0	0
CMR	1961	4	26	5777834	1	0	0	0	0	4	2	0	1	0.975	3	0	0	1	0	20	1	0	0	1
CIV	1960	5	10	4321791	1	0	0	0	0	0	0	0	1	0.902	0	0	1	0	0	5	0	0	0	0
GAB	1960	5	20	532511	2	0	0	0	1	0	0	0	1	0.846	0	0	1	0	0	12	0	0	0	0
GMB	1965	0	16	7710549	0	1	1	0	0	2	0	0	1	0.776	3	0	0	1	0	16	0	0	0	0
GHA	1957	8	29	400861	0	0	0	0	0	0	0	0	1	0.858	3	0	0	1	0	26	1	0	0	0
IDN	1945	20	46	100308894	0	0	0	1	1	3	0	0	0	0.816	3	0	0	1	0	6.75	0	1	1	1
JAM	1962	3	88	1756266	1	1	1	0	0	0	0	0	1	0.017	0	0	1	0	0	83	0	0	0	0
KEN	1963	2	30	9504703	0	1	1	0	0	1	0	0	1	0.927	3	0	0	1	0	26	0	0	1	0
NZL	1947	18	99	2628400	3	1	1	0	0	0	0	0	1	0.291	2	0	0	1	0	98.5	0	0	0	0
PHL	1946	19	77	30913933	1	0	0	0	0	2	0	0	1	0.849	1	0	1	0	0	58.5	0	1	0	0
KOR	1950	15	80	28704674	1	0	0	1	1	0	0	0	0	0.008	0	0	1	0	0	37.5	1	0	1	1
RWA	1961	4	22	3232934	0	0	0	1	1	0	0	1	1	0.09	0	0	1	0	0	17	1	0	1	0
SEN	1960	5	9	3682876	1	1	1	0	0	0	0	0	1	0.778	0	0	1	0	0	6	0	0	0	0
SGP	1965	0	62	1886900	1	1	1	0	0	4	2	0	1	0.773	4	2	0	0	1	62	0	1	0	1
TGO	1960	5	12	1708630	0	0	0	0	1	0	0	0	1	0.905	0	0	1	0	0	10	1	0	0	0
TTO	1962	3	93	912417	2	1	1	0	0	0	0	0	1	0.597	1	0	1	0	0	93	0	0	0	0
UGA	1962	3	38	8014401	0	0	0	0	0	3	0	0	1	0.93	3	0	0	1	0	36	0	0	0	0
TZA	1961	4	23	11683528	0	0	0	0	0	3	0	0	1	0.88	3	0	0	1	0	13	1	0	0	0
ZMB	1964	1	45	3563407	0	1	1	0	0	0	0	0	1	0.828	3	0	0	1	0	44	0	0	0	0

Table 12-3 Data Frame 1965

ISO	indep	age	LITC	pop	income	ADEM	CDEM	CCON	PCON	choice_p	choice_s	DUAL_MOI	INTL_MOI	ling_frac	PRE_P_max	PRE_S_max	HPUR	HPRA	HACC	LITI	MIXED	WW2	VIOLENT	MOI_CH
BEN	1960	15	14	3265165	0	0	0	0	0	1	0	0	1	0.924	0	0	1	0	0	3.9	0	0	0	0
BWA	1966	9	47	825840	1	1	1	0	0	1	0	0	1	0.397	2	0	0	1	0	35	0	0	0	0
BFA	1960	15	9	6154545	0	1	1	0	0	0	0	0	1	0.721	0	0	1	0	0	2.6	0	0	0	0
CMR	1961	14	40	7457362	1	0	1	0	0	4	2	0	1	0.975	3	0	0	1	0	20	1	0	0	1
CIV	1960	15	20	6608609	1	0	0	0	0	0	0	0	1	0.902	0	0	1	0	0	5	0	0	0	0
GNQ	1968	7	55	259747	0	0	0	0	0	0	0	0	1	0.284	0	0	1	0	0	45	0	0	0	0
GAB	1960	15	34	649716	2	0	0	0	1	0	0	0	1	0.846	0	0	1	0	0	12	0	0	0	0
GMB	1965	10	22	9831407	0	1	1	0	0	2	0	0	1	0.776	3	0	0	1	0	16	0	0	0	0
GHA	1957	18	37	521070	0	0	0	0	0	3	0	0	1	0.858	3	0	0	1	0	26	1	0	0	0
IDN	1945	30	61	130724115	0	0	1	1	1	3	0	0	0	0.816	3	0	0	1	0	6.75	0	1	1	1
JAM	1962	13	86	2027737	1	1	1	0	0	0	0	0	1	0.017	0	0	1	0	0	83	0	0	0	0
KEN	1963	12	49	13486629	0	1	1	0	0	3	0	0	1	0.927	3	0	0	1	0	26	0	0	1	0
LSO	1966	9	43	1150635	0	0	1	0	0	0	0	1	1	0.091	0	0	1	0	0	59	0	0	0	0
MUS	1968	7	66	892000	1	1	1	0	0	1	0	0	1	0.216	3	0	0	1	0	64	0	0	0	0
NZL	1947	28	94	3083100	3	1	1	0	0	0	0	0	1	0.291	2	0	0	1	0	98.5	0	0	0	0
PHL	1946	29	83	41295124	1	0	0	1	1	0	0	1	1	0.849	1	0	1	0	0	58.5	0	1	0	0
KOR	1950	25	91	35280725	2	0	0	1	1	0	0	0	0	0.008	0	0	1	0	0	37.5	1	0	1	1
RWA	1961	14	35	4359092	0	0	0	1	1	0	0	1	1	0.09	0	0	1	0	0	17	1	0	1	0
SEN	1960	15	17	4936209	1	0	1	0	0	0	0	0	1	0.778	0	0	1	0	0	6	0	0	0	0
SGP	1965	10	76	2262600	2	1	1	0	0	4	2	0	1	0.773	4	2	0	0	1	62	0	1	0	1
TGO	1960	15	25	2410446	0	0	0	0	1	0	0	0	1	0.905	0	0	1	0	0	10	1	0	0	0
TTO	1962	13	94	1011490	2	1	1	0	0	1	0	0	1	0.597	1	0	1	0	0	93	0	0	0	0
UGA	1962	13	44	10827147	0	0	0	1	1	3	0	0	1	0.93	3	0	0	1	0	36	0	0	0	0
TZA	1961	14	41	15980301	0	0	0	0	0	0	0	1	1	0.88	3	0	0	1	0	13	1	0	0	0
ZMB	1964	11	51	4964831	0	1	1	0	0	0	0	0	1	0.828	3	0	0	1	0	44	0	0	0	0

Table 12-4 Data Frame 1975

ISO	indep	age	LITC	pop	income	ADEM	CDEM	CCON	PCON	choice_p	choice_s	DUAL_MOI	INTL_MOI	ling_frac	PRE_P_max	PRE_S_max	HPUR	HPRA	HACC	LITI	MIXED	WW2	VIOLENT	MOI_CH
BEN	1960	25	26	4278501	0	0	0	0	0	1	0	0	1	0.924	0	0	1	0	0	3.9	0	0	0	0
BWA	1966	19	71	1189114	1	1	1	0	0	0	0	1	1	0.397	2	0	0	1	0	35	0	0	0	0
BFA	1960	25	13	7727907	0	0	0	0	0	0	0	0	1	0.721	0	0	1	0	0	2.6	0	0	0	0
CMR	1961	24	56	10050023	1	0	0	0	0	4	2	0	1	0.975	3	0	0	1	0	20	1	0	0	1
CIV	1960	25	43	10222558	1	0	1	0	0	0	0	0	1	0.902	0	0	1	0	0	5	0	0	0	0
GNQ	1968	17	67	358896	0	0	0	0	0	1	0	0	1	0.284	0	0	1	0	0	45	0	0	0	0
GAB	1960	25	62	830085	2	0	0	0	1	0	0	0	1	0.846	0	0	1	0	0	12	0	0	0	0
GMB	1965	20	25	12716228	0	1	1	0	1	2	0	0	1	0.776	3	0	0	1	0	16	0	0	0	0
GHA	1957	28	53	732096	0	0	0	0	0	3	0	0	1	0.858	3	0	0	1	0	26	1	0	0	0
IDN	1945	40	74	165012196	0	0	0	1	1	3	0	0	0	0.816	3	0	0	1	0	6.75	0	1	1	1
JAM	1962	23	81	2338638	1	1	1	0	0	0	0	0	1	0.017	0	0	1	0	0	83	0	0	0	0
KEN	1963	22	59	19651225	0	0	0	0	0	3	0	0	1	0.927	3	0	0	1	0	26	0	0	1	0
LSO	1966	19	74	1472192	0	0	1	0	0	0	0	1	1	0.091	0	0	1	0	0	59	0	0	0	0
MUS	1968	17	77	1020528	1	1	1	0	0	1	0	0	1	0.216	3	0	0	1	0	64	0	0	0	0
NZL	1947	38	87	3247100	3	1	1	0	0	1	0	0	1	0.291	2	0	0	1	0	98.5	0	0	0	0
PHL	1946	39	86	54323648	1	0	0	1	1	0	0	1	1	0.849	1	0	1	0	0	58.5	0	1	0	0
KOR	1950	35	97	40805744	2	0	0	1	1	0	0	0	0	0.008	0	0	1	0	0	37.5	1	0	1	1
RWA	1961	24	47	6120107	0	0	0	1	1	0	0	1	1	0.09	0	0	1	0	0	17	1	0	1	0
SEN	1960	25	28	6484738	1	0	1	1	1	1	0	0	1	0.778	0	0	1	0	0	6	0	0	0	0
SGP	1965	20	86	2735957	3	1	1	0	0	0	0	0	1	0.773	4	2	0	0	1	62	0	1	0	1
TGO	1960	25	41	3252994	0	0	0	0	1	0	0	0	1	0.905	0	0	1	0	0	10	1	0	0	0
TTO	1962	23	96	1170928	2	1	1	0	0	1	0	0	1	0.597	1	0	1	0	0	93	0	0	0	0
UGA	1962	23	57	14646624	0	0	1	1	1	3	0	0	1	0.93	3	0	0	1	0	36	0	0	0	0
TZA	1961	24	56	21836999	0	0	0	0	1	0	0	1	1	0.88	3	0	0	1	0	13	1	0	0	0
ZMB	1964	21	76	6955212	0	1	1	0	0	1	0	0	1	0.828	3	0	0	1	0	44	0	0	0	0

Table 12-5 Data Frame 1985

ISO	indep	age	LITC	pop	income	ADEM	CDEM	CCON	PCON	choice_p	choice_s	DUAL_MOI	INTL_MOI	ling_frac	PRE_P_max	PRE_S_max	HPUR	HPRA	HACC	LITI	MIXED	WW2	VIOLENT	MOI_CH
BLR	1991	4	99	10194000	1	1	1	0	0	4	2	0	0	0.382	4	2	0	0	1	98	1	1	0	1
BEN	1960	35	29	5905558	0	0	1	0	0	1	0	0	1	0.924	0	0	1	0	0	3.9	0	0	0	0
BWA	1966	29	73	1569094	1	1	1	0	0	0	0	1	1	0.397	2	0	0	1	0	35	0	0	0	0
BFA	1960	35	16	10089878	0	0	1	0	0	1	0	0	1	0.721	0	0	1	0	0	2.6	0	0	0	0
CMR	1961	34	63	13460994	0	0	0	1	1	4	2	0	1	0.975	3	0	0	1	0	20	1	0	0	1
CIV	1960	35	36	14540820	0	0	0	0	0	0	0	0	1	0.902	0	0	1	0	0	5	0	0	0	0
HRV	1990	5	97	4669000	2	1	1	1	1	4	2	0	0	0.104	4	2	0	0	1	96	1	1	1	0
CZE	1993	2	99	10327253	2	1	1	0	0	4	2	0	0	0.072	4	2	0	0	1	99	1	1	0	0
GNQ	1968	27	85	504871	0	0	0	0	0	0	0	0	1	0.284	0	0	1	0	0	45	0	0	0	0
ERI	1993	2	38	3090159	0	0	0	0	0	3	0	0	1	0.65	4	0	0	1	0	34	1	1	1	0
EST	1991	4	100	1436634	1	1	1	0	0	4	2	0	0	0.471	4	2	0	0	1	100	1	1	0	1
GAB	1960	35	73	1086137	2	0	1	0	1	0	0	0	1	0.846	0	0	1	0	0	12	0	0	0	0
GMB	1965	30	35	16760467	0	0	0	0	1	3	0	0	1	0.776	3	0	0	1	0	16	0	0	0	0
GHA	1957	38	51	1066223	0	0	1	0	1	3	0	0	1	0.858	3	0	0	1	0	26	1	0	0	0
IDN	1945	50	85	196957849	1	0	0	1	1	3	1	0	0	0.816	3	0	0	1	0	6.75	0	1	1	1
JAM	1962	33	81	2537440	1	1	1	0	0	0	0	0	1	0.017	0	0	1	0	0	83	0	0	0	0
KAZ	1991	4	99	15815626	1	0	0	0	0	4	2	0	0	0.514	4	2	0	0	1	98	1	0	0	1
KEN	1963	32	61	27346456	0	0	0	0	0	3	0	0	1	0.927	3	0	0	1	0	26	0	0	1	0
KGZ	1991	4	99	4560400	0	1	1	0	1	4	2	0	0	0.459	4	2	0	0	1	98	1	0	0	1
LVA	1991	4	100	2485056	1	1	1	0	0	3	2	0	0	0.534	4	2	0	0	1	100	1	1	1	1
LSO	1966	29	77	1761359	1	0	1	0	0	0	0	1	1	0.091	0	0	1	0	0	59	0	0	0	0
LTU	1991	4	99	3629102	1	1	1	0	0	4	2	0	0	0.416	4	2	0	0	1	99	1	1	1	1
MUS	1968	27	82	1122457	2	1	1	0	0	1	0	0	1	0.216	3	0	0	1	0	64	0	0	0	0
NAM	1990	5	79	1655359	1	1	1	0	0	3	0	0	1	0.789	3	2	0	0	1	75	1	0	1	1
NZL	1947	48	81	3673400	3	1	1	0	0	4	1	0	1	0.291	2	0	0	1	0	98.5	0	0	0	0
PHL	1946	49	94	69835715	1	0	1	1	1	1	0	1	1	0.849	1	0	1	0	0	58.5	0	1	0	0
KOR	1950	45	95	45092991	3	0	1	1	1	0	0	0	0	0.008	0	0	1	0	0	37.5	1	0	1	1
RWA	1961	34	61	5928078	0	0	0	0	1	0	0	1	1	0.09	0	0	1	0	0	17	1	0	1	0
SEN	1960	35	33	8746606	0	0	1	1	1	1	0	0	1	0.778	0	0	1	0	0	6	0	0	0	0
SGP	1965	30	91	3524506	3	1	1	0	0	0	0	0	1	0.773	4	2	0	0	1	62	0	1	0	1

ISO	indep	age	LITC	pop	income	ADEM	CDEM	CCON	PCON	choice_p	choice_s	DUAL_MOI	INTL_MOI	ling_frac	PRE_P_max	PRE_S_max	HPUR	HPRA	HACC	LITI	MIXED	WW2	VIOLENT	MOI_CH
SVK	1993	2	99	5361999	1	1	1	0	0	4	1	0	0	0.246	4	2	0	0	1	99	1	1	0	0
SVN	1991	4	99	1989872	2	1	1	0	0	4	2	0	0	0.166	4	2	0	0	1	100	1	1	1	0
TJK	1991	4	99	5764712	0	0	0	1	1	4	2	0	0	0.276	4	2	0	0	1	98	1	0	1	1
MKD	1991	4	94	1983252	1	1	1	0	0	4	2	0	0	0.495	4	2	0	0	1	93	1	1	0	0
TGO	1960	35	50	4274024	0	0	0	0	1	0	0	0	1	0.905	0	0	1	0	0	10	1	0	0	0
TTO	1962	33	97	1255001	2	1	1	0	0	1	0	0	1	0.597	1	0	1	0	0	93	0	0	0	0
TKM	1991	4	99	4207840	1	0	0	0	0	4	1	0	0	0.457	4	2	0	0	1	98	1	0	0	1
UGA	1962	33	60	20550291	0	0	1	0	1	3	0	0	1	0.93	3	0	0	1	0	36	0	0	0	0
UKR	1991	4	99	51512299	1	1	1	0	0	4	2	0	0	0.497	4	2	0	0	1	99	1	1	0	0
TZA	1961	34	65	29960776	0	0	1	0	1	0	0	1	1	0.88	3	0	0	1	0	13	1	0	0	0
ZMB	1964	31	67	9137077	0	1	1	0	0	3	0	0	1	0.828	3	0	0	1	0	44	0	0	0	0

Table 12-6 Data Frame 1995

ISO	indep	age	LITC	pop	income	ADEM	CDEM	CCON	PCON	choice_p	choice_s	DUAL_MOI	INTL_MOI	ling_frac	PRE_P_max	PRE_S_max	HPUR	HPRA	HACC	LITI	MIXED	WW2	VIOLENT	MOI_CH
BLR	1991	14	100	9663915	1	0	0	0	0	4	2	0	0	0.382	4	2	0	0	1	98	1	1	0	1
BEN	1960	45	30	7982225	0	0	1	0	0	1	0	0	1	0.924	0	0	1	0	0	3.9	0	0	0	0
BWA	1966	39	82	1855852	2	1	1	0	0	1	0	0	1	0.397	2	0	0	1	0	35	0	0	0	0
BFA	1960	45	24	13421930	0	0	1	0	0	1	0	0	1	0.721	0	0	1	0	0	2.6	0	0	0	0
CMR	1961	44	70	17420795	1	0	0	1	1	4	2	0	1	0.975	3	0	0	1	0	20	1	0	0	1
CIV	1960	45	46	18336303	0	0	0	1	1	1	0	0	1	0.902	0	0	1	0	0	5	0	0	0	0
HRV	1990	15	99	4442000	2	1	1	0	1	4	2	0	0	0.104	4	2	0	0	1	96	1	1	1	0
CZE	1993	12	99	10211216	2	1	1	0	0	4	2	0	0	0.072	4	2	0	0	1	99	1	1	0	0
GNQ	1968	37	91	757317	2	0	0	0	0	0	0	0	1	0.284	0	0	1	0	0	45	0	0	0	0
ERI	1993	12	59	3969007	0	0	0	0	1	3	0	0	1	0.65	4	0	0	1	0	34	1	1	1	0
EST	1991	14	100	1354775	2	1	1	0	0	4	2	0	0	0.471	4	2	0	0	1	100	1	1	0	1
GAB	1960	45	79	1403126	2	0	1	0	1	0	0	0	1	0.846	0	0	1	0	0	12	0	0	0	0
GMB	1965	40	39	21542009	0	0	1	0	1	3	0	0	1	0.776	3	0	0	1	0	16	0	0	0	0
GHA	1957	48	65	1444204	0	0	1	0	1	0	0	0	1	0.858	3	0	0	1	0	26	1	0	0	0
IDN	1945	60	91	226712730	1	0	1	0	1	3	1	0	0	0.816	3	0	0	1	0	6.75	0	1	1	1
JAM	1962	43	83	2744673	1	1	1	0	1	1	0	0	1	0.017	0	0	1	0	0	83	0	0	0	0
KAZ	1991	14	100	15147029	1	0	0	0	0	4	2	0	0	0.514	4	2	0	0	1	98	1	0	0	1
KEN	1963	42	75	36048288	1	0	1	0	0	3	0	0	1	0.927	3	0	0	1	0	26	0	0	1	0
KGZ	1991	14	99	5162600	0	0	1	0	1	4	2	0	0	0.459	4	2	0	0	1	98	1	0	0	1
LVA	1991	14	100	2238799	2	1	1	0	0	3	1	0	0	0.534	4	2	0	0	1	100	1	1	1	1
LSO	1966	39	80	1949543	1	0	1	0	0	1	0	1	1	0.091	0	0	1	0	0	59	0	0	0	0
LTU	1991	14	100	3322528	2	1	1	0	0	4	2	0	0	0.416	4	2	0	0	1	99	1	1	1	1
MUS	1968	37	87	1228254	2	1	1	0	0	1	0	0	1	0.216	3	0	0	1	0	64	0	0	0	0
NAM	1990	15	79	2032196	1	1	1	0	1	3	0	0	1	0.789	3	2	0	0	1	75	1	0	1	1
NZL	1947	58	89	4133900	3	1	1	0	0	4	1	0	1	0.291	2	0	0	1	0	98.5	0	0	0	0
PHL	1946	59	94	86274237	1	0	1	1	1	2	0	1	1	0.849	1	0	1	0	0	58.5	0	1	0	0
KOR	1950	55	97	48184561	3	0	1	1	1	0	0	0	0	0.008	0	0	1	0	0	37.5	1	0	1	1
RWA	1961	44	65	8991735	0	0	0	0	1	0	2	1	1	0.09	0	0	1	0	0	17	1	0	1	0
SEN	1960	45	41	11251266	0	0	1	1	1	1	0	0	1	0.778	0	0	1	0	0	6	0	0	0	0
SGP	1965	40	94	4265762	3	1	1	0	0	0	0	0	1	0.773	4	2	0	0	1	62	0	1	0	1

ISO	indep	age	LITC	pop	income	ADEM	CDEM	CCON	PCON	choice_p	choice_s	DUAL_MOI	INTL_MOI	ling_frac	PRE_P_max	PRE_S_max	HPUR	HPRA	HACC	LITI	MIXED	WW2	VIOLENT	MOI_CH
SVK	1993	12	98	5372807	2	1	1	0	0	4	1	0	0	0.246	4	2	0	0	1	99	1	1	0	0
SVN	1991	14	96	2000474	3	1	1	0	0	4	2	0	0	0.166	4	2	0	0	1	100	1	1	1	0
TJK	1991	14	100	6854176	0	0	0	0	1	4	1	0	0	0.276	4	2	0	0	1	98	1	0	1	1
MKD	1991	14	97	2060272	1	1	1	0	1	4	2	0	0	0.495	4	2	0	0	1	93	1	1	0	0
TLS	2002	3	46	1026484	0	1	1	0	0	0	0	0	1	0.819	2	0	0	1	0	40	1	0	1	1
TGO	1960	45	56	5683268	0	0	0	0	1	0	0	0	1	0.905	0	0	1	0	0	10	1	0	0	0
TTO	1962	43	98	1296934	2	1	1	0	0	2	0	0	1	0.597	1	0	1	0	0	93	0	0	0	0
TKM	1991	14	99	4754641	1	0	0	0	0	0	0	0	0	0.457	4	2	0	0	1	98	1	0	0	1
UGA	1962	43	71	28543940	0	0	1	1	1	3	0	0	1	0.93	3	0	0	1	0	36	0	0	0	0
UKR	1991	14	100	47105150	1	1	1	0	0	4	2	0	0	0.497	4	2	0	0	1	99	1	1	0	1
TZA	1961	44	69	39410545	0	0	1	1	1	0	0	1	1	0.88	3	0	0	1	0	13	1	0	0	0
ZMB	1964	41	65	12052156	0	1	1	0	0	2	0	0	1	0.828	3	0	0	1	0	44	0	0	0	0

Table 12-7 Data Frame 2005

ISO	indep	age	LITC	pop	income	ADEM	CDEM	CCON	PCON	choice_p	choice_s	DUAL_MOI	INTL_MOI	ling_frac	PRE_P_max	PRE_S_max	HPUR	HPRA	HACC	LITI	MIXED	WW2	VIOLENT	MOI_CH
BLR	1991	24	100	9489616	2	0	0	0	0	4	1	0	0	0.382	4	2	0	0	1	98	1	1	0	1
BEN	1960	55	36	10575952	0	0	1	0	0	1	0	0	1	0.924	0	0	1	0	0	3.9	0	0	0	0
BWA	1966	49	88	2209197	2	1	1	0	0	1	0	1	1	0.397	2	0	0	1	0	35	0	0	0	0
BFA	1960	55	35	18110624	0	0	1	0	0	1	0	0	1	0.721	0	0	1	0	0	2.6	0	0	0	0
CMR	1961	54	75	22834522	1	0	0	1	1	4	2	0	1	0.975	3	0	0	1	0	20	1	0	0	1
CIV	1960	55	45	23108472	1	0	1	0	1	1	0	0	1	0.902	0	0	1	0	0	5	0	0	0	0
HRV	1990	25	100	4203604	3	1	1	0	1	4	2	0	0	0.104	4	2	0	0	1	96	1	1	1	0
CZE	1993	22	99	10546059	3	1	1	0	0	4	2	0	0	0.072	4	2	0	0	1	99	1	1	0	0
GNQ	1968	47	95	1175389	2	0	0	0	0	0	0	0	1	0.284	0	0	1	0	0	45	0	0	0	0
ERI	1993	22	73	3343000	0	0	0	0	1	3	0	0	1	0.65	4	0	0	1	0	34	1	1	1	0
EST	1991	24	98	1315407	3	1	1	0	0	4	1	0	0	0.471	4	2	0	0	1	100	1	1	0	1
GAB	1960	55	83	1930175	2	0	0	0	1	0	0	0	1	0.846	0	0	1	0	0	12	0	0	0	0
GMB	1965	50	51	27582821	0	0	0	0	1	3	0	0	1	0.776	3	0	0	1	0	16	0	0	0	0
GHA	1957	58	76	1977590	1	0	1	0	1	3	0	0	1	0.858	3	0	0	1	0	26	1	0	0	0
IDN	1945	70	95	258162113	1	0	1	0	1	3	1	0	0	0.816	3	0	0	1	0	6.75	0	1	1	1
JAM	1962	53	87	2871934	2	1	1	0	1	2	0	0	1	0.017	0	0	1	0	0	83	0	0	0	0
KAZ	1991	24	100	17542806	2	0	0	0	0	4	2	0	0	0.514	4	2	0	0	1	98	1	0	0	1
KEN	1963	52	80	47236259	1	0	1	0	1	3	0	0	1	0.927	3	0	0	1	0	26	0	0	1	0
KGZ	1991	24	99	5956900	1	0	1	0	1	4	2	0	0	0.459	4	2	0	0	1	98	1	0	0	1
LVA	1991	24	100	1977527	3	1	1	0	0	3	1	0	0	0.534	4	2	0	0	1	100	1	1	1	1
LSO	1966	49	76	2174645	1	0	1	0	0	3	0	0	1	0.091	0	0	1	0	0	59	0	0	0	0
LTU	1991	24	98	2904910	3	1	1	0	0	4	2	0	0	0.416	4	2	0	0	1	99	1	1	1	1
MUS	1968	47	93	1262605	2	1	1	0	0	2	0	0	1	0.216	3	0	0	1	0	64	0	0	0	0
NAM	1990	25	90	2425561	2	1	1	0	1	3	0	0	1	0.789	3	2	0	0	1	75	1	0	1	1
NZL	1947	68	98	4595700	3	1	1	0	0	4	2	0	1	0.291	2	0	0	1	0	98.5	0	0	0	0
PHL	1946	69	98	101716359	1	0	1	0	1	3	0	1	1	0.849	1	0	1	0	0	58.5	0	1	0	0
KOR	1950	65	98	51014947	3	0	1	1	1	1	0	0	0	0.008	0	0	1	0	0	37.5	1	0	1	1
RWA	1961	54	71	11629553	0	0	0	0	1	0	0	1	1	0.09	0	0	1	0	0	17	1	0	1	0
SEN	1960	55	47	14976994	0	0	1	0	1	1	0	0	1	0.778	0	0	1	0	0	6	0	0	0	0
SGP	1965	50	97	5535002	3	1	1	0	0	0	0	0	1	0.773	4	2	0	0	1	62	0	1	0	1

ISO	indep	age	LITC	pop	income	ADEM	CDEM	CCON	PCON	choice_p	choice_s	DUAL_MOI	INTL_MOI	ling_frac	PRE_P_max	PRE_S_max	HPUR	HPRA	HACC	LITI	MIXED	WW2	VIOLENT	MOI_CH
SVK	1993	22	98	5423801	3	1	1	0	0	4	1	0	0	0.246	4	2	0	0	1	99	1	1	0	0
SVN	1991	24	94	2063531	3	1	1	0	0	4	2	0	0	0.166	4	2	0	0	1	100	1	1	1	0
TJK	1991	24	100	8548651	1	0	0	0	1	4	1	0	0	0.276	4	2	0	0	1	98	1	0	1	1
MKD	1991	24	98	2079308	2	1	1	0	1	4	2	0	0	0.495	4	2	0	0	1	93	1	1	0	0
TLS	2002	13	64	1240977	1	1	1	0	1	2	0	1	1	0.819	2	0	0	1	0	40	1	0	1	1
TGO	1960	55	64	7416802	0	0	1	0	1	0	0	0	1	0.905	0	0	1	0	0	10	1	0	0	0
TTO	1962	53	99	1360092	3	1	1	0	0	2	0	0	1	0.597	1	0	1	0	0	93	0	0	0	0
TKM	1991	24	100	5565284	2	0	0	0	0	0	0	0	0	0.457	4	2	0	0	1	98	1	0	0	1
UGA	1962	53	67	40144870	0	0	0	1	1	3	0	0	1	0.93	3	0	0	1	0	36	0	0	0	0
UKR	1991	24	100	45154029	1	1	1	1	1	4	2	0	0	0.497	4	2	0	0	1	99	1	1	0	1
TZA	1961	54	78	53879957	0	0	1	1	1	0	0	0	0	0.88	3	0	0	1	0	13	1	0	0	0
ZMB	1964	51	85	16100587	1	1	1	0	0	3	0	0	1	0.828	3	0	0	1	0	44	0	0	0	0

Table 12-8 Data Frame 2015

Fiona Victory, 2022