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Table of Contents

Review of Business Books for Educators: How to Praise Others

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Abstract

This review paper introduces five Japanese businessmen who stated the critical importance in praising others in their business. It also describes their backgrounds, philosophies, and recommendations for effective practices in praise. Praising is an essential teaching skill for any teacher in any grade and any school. Therefore, I assume it may be beneficial for many teachers to learn the claims of these Japanese businessmen.

Key Words: Praise, Japan, Business, Teacher

Although educational psychology textbooks (e.g., Santrock, 2008; Snowman & McCown, 2013) teach the importance of praising one's students as examples of positive reinforcements, praising others cannot be restricted within school settings to its effectiveness. Thus, I would like to introduce the readers to five Japanese businessmen who emphasize the critical importance in praising others in their business in this review paper. As a teacher, I usually do not read any business books and I expect not many teachers regularly read business books. Thus, I hope this review paper will be useful for educators in Japan and other places in the world.

Businessman 1: Takayoshi Nishimura

Mr. Takayoshi Nishimura (2019) is the third-generation president of his family business, real estate companies and hotels. He studied about his family business and worked very hard in his early career. He evaluated himself that he used to be a master of pointing out mistakes and problems of his employees. In 2005, he established a new company of mystery shoppers. At the beginning, mystery shoppers of his company went to the client's store or restaurant and bought something as customers and wrote up the reports that contained only deficient points of the store or the restaurant. Then, he lost many clients due to the reports that pointed out so many problems with harsh words. Because he lost many of his clients, he decided to take the opposite way of doing business: finding out what the employees could do well at the client's store or restaurant and writing a report with positive feedback and a positive outlook. After changing his way of doing business, the first client's restaurant had a 161% increase in sales figures in six months. From this shocking incident, he had an insight: humans grow and do better jobs when we acknowledge what they did and believe they can do better in the future.

In 2010, he established a general incorporated association, Japan Praise Masters Association (*nihon homeru tatsujin kyokai* in Japanese), and now he is working as its chairman.

According to him, you must not use praise in order to manipulate others. We praise others in order to organize our own mind. In order to praise others correctly, we must have emotional leeway in our mind so that we can spend our psychological energy to find hidden value of the people, things, and events surrounding ourselves. By finding the hidden value of others, and informing them of these, we improve our own psychological well-being. Thus, we must not expect any response from the target person who received our praises. He defines praising others as a self-sufficient activity that enriches oneself, not others.

He stated that a correct way to praise includes (a) the thing that the target person did, (b) the contribution to someone of what the target person did, and (c) praising the target person with your subjective judgments. For example, you can say, "You always greet me cheerfully in the morning. Your greetings inspire me to work hard every day. Thank you very much." In this example, your target person actually greets you every morning as a matter of fact. Then, you inform him or her how much what he or she did contributed to the welfare of others by your subjective judgments. Your target person cannot deny your subjective judgment that his or her greeting is inspiring to you. If you can add other's praise to the target person, it will become better.

In addition, you should not be reluctant to praise. For example, you have an employee who made three big failures in your organization. Then, the employee did something good, maybe by chance. Then, if you do not praise the person because his contribution was smaller than his past damages to the organization or the success was made by chance, you probably cannot praise the person ever. You should praise someone who did something good, even if it was done by chance, as soon as you notice such an occurrence.

He also said, "We do not praise others because they did good jobs but they can do good jobs because we praised them." Imagine you have an employee who can accomplish 60% of the work that an average worker does in a particular time. You think 70% is the lowest acceptable level of job performance. When the employee improves to 63% from 60%, you probably would not praise him or her because it does not reach the lowest acceptable level. But it is very important to acknowledge such a small improvement and praise it. If you do so, such an employee will make more improvement and eventually reach 70% of the job performance.

He also introduced a small technique to shorten the psychological distance between you and someone who is unfamiliar to you. You ask a small favor and then thank him or her for

doing such a small favor for you. According to him, this technique is one of the useful ways in praising others.

Businessman 2: Koichi Kato

Mr. Koichi Kato (2018) succeeded his family business: a driving school in Mie prefecture, Japan. When he started to work at his driving school around 1990, his school was filled with Japanese baby-boomers. However, due to the low birth rate in Japan, the number of graduates of all the driving schools in Japan significantly decreased from approximately 2.55 million in 1992 to 1.56 million in 2016, and also more than 200 driving schools closed their business during that time.

One day, he found a newspaper article that reported an empirical study that found receiving praise improved finger-tapping performances, like playing a piano, of the participants (Sugawara et al., 2012). After reading it, he started to wonder how he can incorporate praising practices into his school's teaching curriculum. Then, he invited guest speakers (e.g., Mr. Takayoshi Nishimura in the previous section) and they had several similar workshops. When he asked his employees about a new idea of praising education in his driving school, many of them claimed that they were not confident with their praising skills of others. So, he started a pair-work of praising one's partner during every morning assembly of his school. In this practice, every employee must praise his or her partner for a minute. He noticed that these employees first praised external characteristics (e.g., hair style, clothes, decorations) of others. But later, they started to praise internal characteristics (e.g., actions, statements). After receiving such praises from the colleagues, they felt that other colleagues observed them carefully and could build trustful and friendly relationships with one another. Later, he introduced two different types of praising exercises. The first one was praising a particular object (e.g.,

whiteboard, tissue paper) in turns. The second one was group work of approximately ten

people. Each person in the group received praise from other group members in order. After

these practices, he noticed the atmosphere of his school changed significantly. Many employees

used to wear grim faces, but now they looked relaxed and smiled often. Indeed, the employee

turnover also decreased.

His school started a new curriculum of acknowledging and praising students to the

skies (*homechigiru* in Japanese) in February 2013. After introducing such a curriculum, three

major benefits emerged at this school. First, the number of student enrollment increased

significantly from 1748 students in 2013 to 2177 students in 2016. Second, the passing rate of

driving tests increased from 81.4% in 2014 to 85.9% in 2016. Third, the accident rate of the

graduates decreased from 1.57% in 2013 to 0.76% in 2015.

He emphasized that his school used to teach students by informing them what they

lack to satisfy the acceptable standard of the test criteria but the new curriculum teaches

students by informing them how much they have already achieved such criteria. In other words,

it means informing what students have already achieved and acknowledging students' efforts

and progress from the past.

I would like to end this case by introducing his recommendations. First, it is important

to praise others as soon as you find something good in others in order to make your praise

efficient. Second, he recommends praising others when you meet them for the first time. If you

praise him or her at the first meeting, it is easier to make a good human relationship with that

person in the future. Third, he recommends asking questions to the students about why he or

she succeeded or failed in a particular task. If a student knows the reasons for his or her success

or failure in a particular task, he or she will be motivated to try it more. Fourth, when you notice

a tiny, good deed that someone did, you should say thanks which include the deed and the

benefit that was made from the deed. For example, if someone made a copy for you, you could say, "Thank you for making a copy. I can ask you this task with full confidence because you always make a crisp copy." Fifth, he recommends praising someone in comparison with the general public or yourself. You can say, "Your achievement cannot be reached by other ordinary people." But you must not make a comparison statement with a particular person, except yourself. You can say, "You had much better performances than I did when I was in your situation." Sixth, he recommends praising someone's skills like a professional. If a person is praised for achieving a particular skill at a professional level, it would be the greatest praise. Seventh, he recommends praising any questions from the students. As long as you praise any questions, it shows your appreciation to the students who are more motivated to study more than other students. Eighth, he suggests informing people that someone else has praised them. Indirect praise, such as "Our section chief praised you." is effective. However, you must not tell a lie. Try to share the good deeds of your praising target with others always and remember the praises of others. Ninth, instead of giving direct praise, you can give positive responses, such as, "Wow!" or "I never had such an idea!" This results in indirect praise. Humans tend to talk to themselves when they express what they really think. Tenth, he recommends ending the lessons with praise, even though the lesson did not work well. You can give positive messages to the students so that they can keep higher motivation for further learning.

Businessman 3: Hideo Matsumoto

Although Mr. Hideo Matsumoto (2020) inherited his family business of a gas station, he was stuck in his business. Then, he changed his career at the age of 45 and became a contract worker with a commission system at a foreign non-life insurance company. Although he visited more than 70 different companies every day to sell his insurance, he was not

successful at the beginning. One day, he noticed that successful colleagues surrounding him use the magic word: "Thank you very much." very frequently. Therefore, he changed his statements intentionally by using such appreciations. For example, he used to say, "I am sorry to use your time for my sake during your busy schedule." But he rephrased it to "Thank you very much for using your time for my sake during your busy schedule." After starting such a rephasing practice, he started to win more insurance contracts, won the Rookie of the Year Award, and became one of the best salespeople of the company. According to him, "Thank you very much" is the best praise word because it praises both the actions that the target person did and the target person himself or herself and it can be used to anyone and in any situation.

According to him, one of the most important skills in praising others is a careful observational skill. Such an observational skill includes not only observation itself but also listening to what the target person says carefully and asking meaningful questions so that you can find and understand his or her hidden value. One day, he visited a difficult and complaining customer who asked his non-life insurance company to change the contact person three times. He met the customer who was a president of a start-up company and having listened to the complaints carefully asked the question, "President, why do you have six printers, although there are only four computers in this office?" The president smiled and said, "We are printing 3,000 direct mails in order to inform many customers of our services. You are the first contact person who noticed such a fact." It seemed that the president wanted a contact person who understands his passion for informing customers of his new business. Later, the start-up company became a large customer for his non-life insurance company.

As you see in the case above, praising does not always mean giving a compliment to others. According to him, praising means finding value (that is often hidden) in someone or something and communicating such a fact to the target person. According to him, a Praise

Master (*homeru tatsujin* in Japanese) is someone who is good at finding value (that is often hidden) in someone or something.

After he became a senior position in the sales department, he used the merit point system, instead of demerit point system to evaluate his junior sales people. He praised what the junior sales people could achieve in their work, and then advised how he or she could do better. Just two years after the Lehman shock, he became a trainer for a branch office that had 500 sales people. His company's business performance was stagnant at that time and he and other trainers started a 3-month campaign of praise. In the campaign, there are five major praising activities. First, sending praising emails to these 500 sales people every morning. Second, praising the quality of insurance services they sell. Third, praising the staff and the supervisors who support the sales people. Fourth, praising each sales person by making a poster with the face pictures of all 500 sales people. Fifth, praising the sales people who won successful contracts for their deeds and challenging spirits at the video conferences that connect all the branch offices in Japan. As a result, the sales figure became 130% of that of the previous year.

According to him, praising means giving a psychological reward that works as psychological fuel to motivate someone to take more action. Many Japanese business people are evaluated by their job performance with their salary and titles but they feel that their daily challenges, efforts, changes, and growth are not acknowledged much by others. It means that they do not receive positive feedback from others regarding their daily actions. Some managers and executives complain that their employees are not working for the purpose of receiving praise. But he says that doing business means contributing something good to the customers and receiving money is an expression of the customers' satisfaction. In other words, the money the customers pay is the customers' praise. The relationship between the contribution and satisfaction can be understood well with the relationship between employee satisfaction and

customer satisfaction. If a person works and contributes something good to another person and the beneficiary is satisfied, the satisfied beneficiary works and contributes something good to a different person and that person is satisfied. It is a chain of contribution and satisfaction. It means that we need to make a culture of praise in order to make employee satisfaction, and satisfied employees make satisfied customers and the business as a whole flourishes.

He also noticed there are some people who are against praising others. He distinguishes an old-style praise from a new-style of praise. The old style of praise was evaluating the results of someone's actions from the upper-level individuals in order to manipulate that person. The new-style of praise means acknowledging someone's daily challenges, efforts, changes, and growth to make better results as the sign of empowerment of both those who praised and others who received the praise. In the new-style of praise, someone who praises others actually becomes happier because he or she can find more value in others and things that surround himself or herself. According to him, "It is a matter of course." is a dangerous phrase because it blinds us from seeing value that is hidden in people, things, and incidents. A Praise Master can find value, charm, and future possibilities in the surrounding people, things, and daily events. Although we often hear the phrase: "Even though we cannot change others and the past, we can change ourselves and the future.", we can change the past by changing our viewpoint of it. Of course, we cannot physically change the past events and the actions of others. But we can change how we interpret them. For example, we can reinterpret the past failures as something that brings our growth. According to him, "Your failures are your assets." When we did not get our expected results, we usually call the incidents as failures. But because of such experiences, we learn something new and try it in a different way and then we grow as a human being through such processes. Thus, according to him, another one of the

most important skills in praising others is changing our viewpoints in order to find hidden value in people, things, and events.

Businessman 4: Kunio Hara

Mr. Kunio Hara (2020), who is now preaching his original "praise education (*homeiku* in Japanese)" in 17 different countries including Japan, grew up with lots of praise from his parents, especially from his mother. However, he first did not notice the miraculous power of praise to make a better performance in business.

In his early career, he worked at a ramen-noodle chain restaurant. Because of his hard work, he was promoted to restaurant manager from the lowest-ranked dishwasher within 1.5 years. Then, he started a very strict management because he wanted his restaurant to become very successful. Every day, he pointed out mistakes five to ten times per staff member. At the beginning, he had twenty-five workers in his restaurant, but later he had only a deputy manager and four part-time workers.

One day, a part-time worker asked him, "Who is our MVP (Most Valuable Player) of this month?" when his restaurant made better sales performance than a rival store. That statement made him shake his head because he always thought that he is the only valuable worker and all others are valueless in his restaurant.

He chose a particular female part-time worker as the MVP of that month by saying, "Maybe, Ms. Y (i.e., pseudonym) is the MVP because she is always cheerful and liked by our regular customers. In addition, she worked when the other workers could not work, found what she should do for the sake of the restaurant by herself, and dealt with waiting customers perfectly." When she heard such an unexpected statement from him, she was puzzled a little but said, "Thank you very much! I will continue my best next month." He thought, "This is it."

when he saw her happy smile. It was the turning point in his life. He decided to shift his attention from what each worker failed to do to what each worker succeeded at.

He started to hold a monthly praising meeting with all of his staff members. In the meeting, he thanked each worker by praising him or her for what he or she did with a concrete example of his or her contribution to the restaurant. Then, he started to show his appreciation to each worker on a daily basis. As a result, the sales figures of his restaurant significantly increased, the employee turnover decreased, and the salary and hourly wages were increased.

I would like to end this case by introducing his original technique to give full marks of praise to others. He explained three major steps for it. The first step is making a good relationship with others. In particular, you need to show your willingness to understand others more deeply by nodding and giving affirmative responses (e.g., "Right", "Yeah", "uh-huh"). The second step is finding appropriate points of praise regarding the target person. In order to detect the appropriate points of praise for the target person, he offers three effective questions. The first question is asking what he or she likes. By learning what he or she likes, you can guess his or her personality. He also recommends continuing a further investigation by asking why he or she likes it and especially which part of it he or she likes in order to deepen your understanding of that person. The second question is asking what he or she continues doing. By learning what he or she continues doing, you can guess his or her way of life from the past to the present. He also recommends continuing a further investigation by asking why he or she could continue it such a long time through tough times and what he or she wants to continue from now on. The third question is asking what he or she cherishes. By learning what he or she cherishes, you can guess his or her value. He also recommends continuing a further investigation by asking why he or she cherishes it and what he or she wants to cherish from now on. The third step is praising the target person in affirming his or her whole life from the

past, to the present, and the future in considering what he or she has achieved by overcoming the hardships in tough times.

Businessman 5: Yoshiyuki Suzuki

In 1997, Mr. Yoshiyuki Suzuki (2009) established a new company that trains professional coaches. It was the first company of that kind in Japan. He explained the praise in terms of coaching. In the coaching framework, acknowledgement includes the concept of praise because it includes all the words and deeds that acknowledge the existence of the target person.

According to him, acknowledgement satisfies basic human needs to be confirmed as a member of a particular group. Throughout history humans have had to be part of a group in order to survive. Thus, acknowledgement increases motivation of the target person because it gives psychological relief to him or her and fuels him or her to do more actions.

According to him, praising someone means giving acknowledging words or deeds to the results of someone's actions. However, humans are not satisfied if they are acknowledged only when they have made noticeable results. Many workers wanted to be acknowledged when they made new efforts. Therefore, supervisors should make frequent acknowledgments instead of praise. You do not have to give compliments but communicate to him or her that you acknowledge his or her actions. You simply need to convey the messages of acknowledgement of his or her existence and actions (e.g., "You got a new tie.", "I heard you visited three new companies this week and informed them about our services.", "You usually come to work around 8 a.m."). Such acknowledgements are the daily bread for the human mind because they are fuel for humans to do more actions.

He also emphasized that acknowledgement is effective to make better relationships with your children and spouse. For example, you can say, "I am glad to see you are helping your mother in doing household chores." or "You are working hard on your club activities nowadays," to your children. In other words, you need to give showers of such acknowledging words to your children and spouse to inform them that they are precious and irreplaceable to you.

When supervisors teach their young employees about appropriate behavior in business, it is very important for supervisors to explain clear reasons for each appropriate action. Excellent coaches in any sport carefully explain to young athletes that this is what this practice is for and this is what this rule is for. Such a practice is also effective to teachers in schools when they teach their own students.

If we want to praise someone efficiently, we must find appropriate words that the target person would like to hear from others. Praising others is a skill that you can learn but you must observe the target person and find appropriate words for each person.

There are two major ways to acknowledge others. The first is the "you" statement. It explains the target person's behavior. "You wrote an excellent report." or "You are a hard-working person." are such examples. Second one is the "I" statement. It explains how much the target person contributed to the welfare of others. "I could do this project easier because of your support." or "I become more energetic due to your existence in our office." are such examples. The latter statements are more long-lasting than the former statements because humans can acknowledge their value in learning their positive influence on others.

As you see from above, these Japanese businessmen have their own philosophies in praise. It is up to each reader to choose and apply the ones he or she prefers. As for me, as a teacher, I think it is good to know the following regarding praise in my teaching practice.

1. Careful observations of each student are necessary to find his or her hidden strengths.
2. When a student did a tiny change or improvement, a teacher should praise it as soon as it happens, even if it was just by chance.
3. Acknowledging the existence and the actions of each student is important.
4. Informing each student of his or her contribution to the welfare of others is crucial.
5. Giving any compliments is not always necessary but acknowledging the actions, efforts, and changes are necessary for each student.

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The Development of a Banking English Seminar

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Introduction

Developing materials for any specialized course involves the understanding of different stakeholder needs, then evaluating and updating materials after they have been used. The development of this course started in 2019 when Miyazaki Bank asked Miyazaki International College to set-up and run some English courses. Two members of faculty were asked if they would participate in the project. Initially, a needs analysis was conducted involving trainees and administrators so that a more focused course could be developed (Dudley-Evans & St. John, 1998). After that, training materials were developed. Three courses were taught in 2019. Course materials were improved during a further eight courses in 2020, tailored to newer or more experienced employees. During this process, the MIC instructors leading the courses studied other teaching materials related to English for banking. Finally, in 2021, the instructors evaluated the pedagogical and interactive features of the materials.

Literature Review

Banking English Courses and Materials

It was difficult to find Banking English research in general and specifically in Japan. Mohammadzadeh, Barati and Fatemi (2015), conducted a needs analysis of 70 bank employees in Mashhad in Iran, and found that 75% of respondents said that English speaking skills were

extremely or very necessary, with 70% rating reading skills as necessary too. The reason was to cater for the number of foreigners who came to Eastern Iran.

Al-Khatib (2005) compared tourism and banking English needs in Jordan. He surveyed and interviewed fifteen senior personnel in the banking industry, and asked them about perceptions of needs, wants and lacks. The personnel had all studied English as a foreign language for eight to ten years, and their university degrees were studied through English as a medium of instruction. He said that 72% of them needed English for communication, 65% for improving their language performance, 44% for a future job, and 24% for traveling abroad. They used Arabic to talk to other Jordanian coworkers, but 60% of in-bank work was conducted in English.

Nguyen Khanh and Le Thi (2019) studied banking English needs in Vietnam and deduced that the communicative approach should be used because of the communicative tasks the learners had to do in their work. They said that the syllabus should include practical real-life tasks, and also use the students' knowledge and encourage student autonomy for their learning.

They also used the textbook *Career Path: Banking* (Evans & Gilmore, 2011), which has units on bank documents, bank machines, parts of a bank, numbers, online banking, administrative work, saving and checking accounts, and teller duties. Other Banking English textbooks include *English for Banking and Finance 1* (Richey, 2011); which has units on personal finance, jobs in banking, products and services, transactions and investment; and *Banking and Finance* (Marks, 2007) which is more focused on specialized vocabulary.

Wu and Chin (2010) investigated the English needs of banking and finance professionals in Taiwan. They interviewed 16 executives and managers, and 241 Taiwanese banking employees. They found that participants most frequently used reading, listening, speaking, writing, Chinese-to-English translations, and English-to-Chinese translations.

Overall, they needed to read English emails, finance-related websites, and newspapers the most often. Writing emails was the primary writing task, and 52% reported that they rarely spoke English at their places of work. Translating Chinese to English was needed the least often. However, 85% of respondents wanted to improve their oral communication, and 76% wanted to improve their listening ability. Therefore, even though spoken English was not often used in their work settings, they wanted to take training courses to improve their spoken interaction skills, such as business conversation and presentation skills, along with improving their communication strategies and cross-cultural understanding. Furthermore, they wanted integrated, financial English and self-directed learning content.

The only banking or financial ESP course development research we were able to find in Japan was Hashimoto's (1994) *ESP and teaching of financial English* paper which described the development of different ESP corpora. He recommended that an ESP textbook should have basic sentence structures, expressions, and a general English vocabulary, as well as a knowledge of Business English, and a glossary of technical financial terms.

Business English Materials Evaluation Framework

For the banking context presented in this paper, Chan's (2009) framework for evaluating business English materials was used with adaptations. Chan developed this framework because "business English teachers, especially those without much business experience, often have to rely on materials which contain inauthentic or inappropriate language and skills" (Chan, 2009, pp. 125-126 as cited by Wu & Chin, 2010). The framework is holistic and has been used for measuring the effectiveness of the proposed needs analysis, learning objectives, methodology, naturalness of the language models, contextualization of the language, and learner autonomy (Chan, 2009, as cited by Simpson, 2018). Tables 1A and 1B, in the Appendix, show the pedagogical and interactional aspects of banking teaching materials.

Methodology

Brown (2009) described a needs analysis as the collection of subjective opinions (from domain insiders, trainers and trainees) and objective information (previous training materials) required to create a defensible curriculum. It was important to make the course situation specific, learner centered, pragmatic and systematic (Purpura et al., 2003 as cited by Brown, 2016). With this in mind, a meeting with the bank representatives was held in May 2019 to discuss their employee and course needs. This was followed up with trainee surveys. The new employee pre-workshop surveys were conducted for the first seminar in 2019, including the following writing prompts:

We want to know about you and your English level, so please introduce yourself in English in about 150 words.

What would you say to a foreign customer when they come into the bank?

Would you use English or Japanese? What would you say?

A more experienced employee seminar was also conducted in 2019, and the pre and post-workshop written surveys included these prompts:

We would like to know about you and your English level, so please introduce yourself in English.

We would like to know your feedback about the course. What was interesting? What was difficult? What could we improve in the future?

We ran the course once in 2021, eight times in 2020 and three times in 2019. Throughout this time, the materials were updated, improved and adapted for different seminar lengths. An evaluation of our current materials was conducted using the checklist in the Appendix. We also referenced the published banking English materials mentioned earlier in creating our materials.

Set-up Meeting

Our first meeting in 2019 was with the Miyazaki Bank personnel department and two international division managers to discuss some possible "Business English" courses. They said that there were two potential types of courses of interest to them, for new staff, and for experienced staff. New employees usually have a six-week training period, which includes business manners, dealing with customers and providing services, and making phone calls. The personnel manager wanted the new employees to be confident in dealing with foreign customers and suggested a seminar at that time in which we could practice some introductions and conduct icebreakers in English followed by use of our English language course materials and role play, for a two-hour course, as part of the new employee training.

The international division managers said that they would like a separate seminar for more experienced members of staff. With a branch in Taiwan, those employees were responsible for domestic and international transactions. To work overseas, the employees need a TOEIC score of over 500. The goal here for us was to train twenty to thirty employees from all over the prefecture who were not so proficient in English. They suggested we focus on introductions, transaction questions, questions for international money transfers, and confidence building in English.

Miyazaki Bank provided some sample training materials, including an explanation of the ATM screen, some polite welcome phrases, some credit/withdrawal and remittance phrases, some English phrases for completing a few sample forms, actual banking forms, currency exchange, and instructions for standard operating procedures.

New Staff Training - Pre-Task Level Checks

Pre-task level checks from the first seminar were received from twenty-seven employees. They were twenty-two to twenty-five years old, hailing from locations all around

Miyazaki prefecture. The majority had studied at universities in Kyushu. Over fifty percent had majored in economics, with others including agriculture, electronics, education, French, and intercultural communication. Again, fifty percent said that they would talk in Japanese to foreign banking customers when they first meet, and the other fifty percent gave examples of English phrases, such as, 'May I help you?' and 'Can I help with something?' Four trainees said that they would also ask 'where are you from?' as a means of trying to be friendly. Judging from the survey, their English ability varied from basic, with very short sentences, spelling and grammar mistakes, overuse of the pronoun 'I', and no linked cohesion between sentences; to students with good sequencing, and accurate subordinate clause and conditional use. There were also comments that they would like to improve their overall communicative competence. From the survey results, the majority were probably high beginner, CEFR A2 level.

Experienced Staff Training Pre and Post-workshop Tasks

Pre-task level checks were received from thirteen employees. Ages of the more experienced employees ranged from twenty-four to fifty. They were based in different branches around the prefecture, in varied sections, such as loans, audits, or the regional revitalization solution business. Abilities, which could be assessed from their written survey responses, ranged from very low to very high. One trainee admitted having never spoken English before, but wanted to learn. Another who used Japanese English spelling couldn't punctuate and had issues with prepositions. A high intermediate level student with experience of living in Canada for nine months had a TOEIC score of 890. Similarly, another trainee wrote extensively about her interest in foreign language and culture. They were the outliers, with the majority presenting evidence of high CEFR A2 level ability.

The post workshop feedback showed that they enjoyed and were satisfied with the course and learned how to respond to customers. Seventy percent reported wanting to study and practice more English in the future. A few notable comments included difficulty with large numbers in English and trouble listening. An example comment was that, "Maybe you might speak more slowly in demonstration next time." Another trainee wrote in Japanese. Translation: "ATM was very practical. I learned a lot, but I have no confidence, but I can use this text in future too. I got confidence from practicing in a group in the classroom. We could teach each other too in pair work. Choosing good group partners was important." Allowing participants to give feedback in either language evidently resulted in feedback quantity and quality that may not have been received otherwise.

Materials Development

After the initial set-up meetings and the suggestions from managers, we decided to make use of the bank's basic English ATM materials, customer welcome guidelines, withdrawal and remittance templates and actual banking forms to develop new materials. However, their Common Reporting Standards were not used because they were more of an internal document. We decided not to use their original currency exchange notes because it would be too much for a two-hour seminar. The pre-seminar needs analyses and (later) post-seminar feedback forms were also employed in the development of the seminar. The seminar materials were designed so that activities could be prolonged or skipped to accommodate longer sessions of three hours or a higher overall level of students.

When designing materials, initial guidance from the managers was taken onboard. Several common points of customer service from the instructors' personal experiences as expats in Japan were inserted, as was information procured from visits to various branches to look at the teller machines. We picked up commonly used banking forms, and chatted further

with bank representatives assigned to assisting this project. It was decided that creating one general program could satisfy different levels and would allow the instructors to focus on different needs; not all of the materials given to the participants would necessarily be covered during the seminar, but those materials could provide extra study and practice content should some participants want to pursue work on their own.

For a two hour-seminar, we narrowed the focus to include the following functions: helping foreign clients open a bank account and assisting them at the ATM machines to withdraw money, deposit money, and make a balance inquiry. Since numbers and counting are infamously challenging when translating between the two languages, and since this was a banking seminar, it was decided to allot some time to teach, and practice working with numbers. In addition, participants asked for basic language practice. Since if confronted with English-speaking foreigners there would likely be a negotiation of meaning, control language was also included. Although changes occurred within the main training booklet which was created, the outline remained consistent and is as follows:

1. Warm-up
2. Opening a bank account
a. Language for opening a bank account
b. Giving instructions and answering questions
3. ATM, balance inquiry, deposit and withdrawal
a. Language for using the ATM
b. Helping customers at the ATM – listening and reading
c. Helping customers at the counter – reading and speaking
4. Appendix: Useful language
a. Control language
b. Numbers

Teaching Methodology

The first thing instructors did at the start of every seminar was to read through the outline, so participants knew what to expect. We then dived straight into the control language page at the end of the booklet. Control language refers to phrases used for interrupting, stating level of understanding, and asking for clarification, repetition, meaning, and rephrasing. Participants familiarized themselves with these phrases by taking turns reading them to each other aloud in pairs (Japanese equivalents were provided). Students then tested each other to see how much they could recall first in Japanese then in English. We told them that they were expected to use the language when necessary and without hesitation during the rest of the seminar.

We then proceeded to the warm-up, the first part of which consisted of a model conversation between the two instructors, which was repeated several times. While listening, participants had to listen for several control language phrases. After confirming the answers through slides, we then explained the type of information we had exchanged in our model conversation was a mix of work-related and appropriately personal content. We asked participants to practice their own conversations in pairs with participants in their group. No language was introduced, as the goal was to serve as an icebreaker, build up some confidence and practice fluency. The model conversation we constructed was meant to instruct through demonstration the kinds of clarification language that the instructors prefer.

The above icebreaker is how we have most recently done the icebreaker in the seminar. In previous iterations, however, it was much more dynamic. We had students stand in two circles, one inside the other, and rotate in different directions so that they could introduce themselves to multiple partners in English. This was much more enjoyable particularly for

groups of younger members in the program, but was time consuming, confusing to some at first, and was certainly not ideal once the pandemic started.

The second section started with an introduction of questions in English typically used by customer service representatives when opening a bank account. They included questions about the kind of account; request for passport or residence card, name and address verification; and permission to photocopy ID. We went over some potential conflict they might face with some foreigners at this stage, specifically requests for personal information that the bank requires for foreigners but not for Japanese citizens. They were guided to respond in English that they are following bank and/or government rules.

Following the above general language for opening a bank account, participants were presented with a list of phrases for giving instructions and answering questions related to opening an account. The phrases corresponded with the bank's own application form, an image of which was included in the booklet. The form and the English language instructions or questions included content like name, address, date of birth, gender, place of employment, telephone numbers, initial deposit amounts, type of bank book, type of bank card, etc.

The next section of the seminar was about vocabulary and phrases for working at the ATMs. Participants were presented with an image of the options of the bank ATM initial screen, along with a bilingual table with Japanese, English translations, and English definitions. Participants worked in pairs to review and try to remember this information with each other before proceeding to a matching activity, shown in figure 1.

Figure 1.

Match the English translation and meaning to the Japanese word.

Japanese 日本語	Number 数字	English 英語	Meaning 意味(英語で)
クレジット カード		1. Bank account withdrawal limit change	request to change the bank account withdrawal limit
お振り替え		2. Withdrawal	withdraw (take out) cash
暗証番号変更		3. Bank loan repayment	repay some of the bank loan
限度額変更		4. Balance inquiry	check how much money is in your account
カード ローン		5. Credit card withdrawal	withdraw money from your credit card
カード ローン返済		6. Bank loan	withdraw money using a bank loan
お振り込み		7. Savings account deposit	deposit (put in) cash into your savings account
振込カード 登録		8. Bank book update (passbook)	print a record of recent transactions in your bank book
お引き出し		9. Transfer	transfer money to a bank account at another bank

ご預金		10. PIN change	change your ATM Personal Identification Number
残高照会		11. Transfer card registration	create a card for easy transfers to a specified account
通帳記入		12. Deposit	deposit (put in) cash
定期ご預金		13. Account Transfer	move money to another account

We prepared four different model conversations that could take place at the ATM for participants to listen to. Key elements of the conversation were removed to turn them into cloze activities. The conversations included a request for assistance in withdrawing cash, depositing cash, and making a balance inquiry. Conversations were delivered at native then slow speeds up to three times. Participants shared their answers with each other, and answers were revealed in slides followed by Q&A. Finally, time was given to participants to practice the dialogues in pairs, trying as much as possible to read first, then maintain eye contact while speaking. Figure 2 shows an example of one listening cloze activity.

Figure 2.

In pairs, listen and fill in the gaps. Then practice reading together.

S = Staff member, C = Customer

S: おはようございます。/ いらっしゃいませ。
C: こんにちは。Do you speak English?
S: Yes, ………………… I help you?
C: I'd like to ……………………………………………. is in my account.
S: I see, you'd like…..………………..……………………………..……...
　　OK, please press the 残高照会 (balance inquiry) button.
C: Ok.
S: Insert your card and enter your ………….
C: Ok.
S: Press the 現金支払 (withdrawal) button if you would like to make a
　　withdrawal
C: Yes, please. 40,000 yen, please.
S: Ok. ………….. the amount shown on the ………….. and press the 確認
　　(confirmation) button.
C: Ok.
S: Take your money and your ………….
C: Great, thanks for your help.

If it became evident that expressing numbers in English was a widespread issue, we skipped to the end of the booklet to review numbers. We created a page-worth of content breaking down how to exaggerate the different pronunciation between thirteen and thirty, for example, how longer numbers in English are broken down into threes, and how to quickly say them. We also reviewed the symbols and pronunciation of some world currencies that the bank currently deals with (determined after consulting with managers). Figure 3 shows a practice activity we used. Participants took turns listening and speaking in this activity, making use of control language wherever necessary. The activity was cut short if time was an issue. Participants struggling with numbers were encouraged to make up their own numbers to practice after the seminar with colleagues, family, and friends.

Figure 3.

Partner A:
Read the amounts in different currencies below to your partner. Listen to their numbers and write them down.

€10,690
USD670,000
HKD240,500,000
₩16
¥2,692,000,012

After gaining some confidence with numbers, the next roleplay section of the seminar commenced. In most cases, we were not able to get through all the roleplays but presenting several possible scenarios meant participants could practice on their own time after the seminar. All the roleplays were concerned with helping customers at the counter. The first three included fully-scripted scenarios requesting help withdrawing money, depositing money, and balance inquiries. This time, images of the bank's own forms for these functions were provided for visual support in the booklet. Figure 4 shows one of several scripted roleplays.

Figure 4.

Now, role play the following situation with a partner. Take turns being the member of staff and the customer.

S = Staff member, C = Customer

Situation 1: The customer, Simon Woods, would like to take one hundred thousand yen out of his account, and needs help.

S: おはようございます。
C: おはようございます。 Can you speak English?
S: Yes, a little. How can I help you?
C: I'd like to make a withdrawal from my account, please.
S: Just a moment. Can you please fill in this form?
   Please write your name here, branch number and account number
   here, and the amount here.
C: What does this mean? (百万)
S: That means 1,000,000 (one million) yen.
C: 100 ten thousand-yen bills?
S: Yes, 100 ten thousand-yen bills is one million yen.
C: I see. OK, I just want to withdraw one hundred thousand yen, so I'll write it
   here. Just a moment. OK, I've finished. Here you are.
S: And please stamp your *inkan* here.
C: OK.
S: Thank you. Just a moment. Please take a seat.
   Mr. Woods, here's 100,000 yen and your bank book.
C: Thank you.
S: Thank you. ありがとうございました。

     The final section of the seminar was included only for the longer seminars. It was the most challenging because it included unscripted role plays, such as in figure 5.

Figure 5.

Situation 3: The customer, James Flynn, would like to transfer money to a bank account at another bank.

For this set of activities, realia in the form of actual bank forms from the bank were supplied. The forms served as prompts, as they would in real life.

Going solely with the official feedback we collected, all stakeholders were satisfied from the first time the program was delivered. Based on each seminar and details received regarding the participants of forthcoming sessions, however, the booklet created for students, the slides, answer keys, and methodology used were tweaked several times. Feedback resulted in the addition of currency symbols with pronunciation in the numbers section, and digital audio recordings of example conversations. Additionally, dialogues were updated to show more clearly who was the client or customer, and who was the customer service representative. We corrected some errors in punctuation and formatting and inserted the bank's own forms to use as realia when doing role play. A larger change in 2020 was a trimming of the reading section to combine it with the unscripted speaking tasks because we judged that there was too much content and not enough speaking practice.

Discussion

Based on Chan's (2009) framework for evaluating business English materials in Table 1A in the Appendix, each category - from learning objectives, to methodology, naturalness of language models, contextualization, and learner autonomy - was used to analyze the pedagogical features of the materials. The materials were developed to meet the workplace needs of bank employees interacting with foreign customers, as was requested by the bank. Tasks such as helping customers to operate an ATM, open a bank account, or make a withdrawal are familiar to experienced employees, so they are suitable for workplace English skills training development and can be adapted and extended for trainees with different English level abilities. However, they do not consider the trainees' personal interests, nor more experienced trainees' opinions about what English skills development they need.

The main learning objectives were for the trainees to build confidence using English, deal with foreign customers, practice role play conversations and have a set of Banking English materials that they could take away and use as self-study reference material. The warm-up materials gave examples of how to interact naturally in social situations, how to show the level of understanding, ask for clarification, and paraphrase. The tasks included copies of authentic realia, such as a passport, residence card, bank book, a form for opening a bank account, a picture of an ATM screen with only Japanese writing, and forms for withdrawals, deposits, and bank transfers.

Given the limited length of the course (two hours), it was decided that the customer and employee vocabulary and sentences, including natural openings and closings, should be presented to the trainees before they practice by themselves. For example, when giving instructions about how to open an account, mainly the employee gives clear instructions, such as "please write the date you would like the account to open". For the ATM language, a matching activity was used to match the Japanese with the English translation and the English meaning. The ATM balance inquiry and withdrawal cloze listening comprehension activities included dialogues which were constructed by the instructors, and aimed to be natural and authentic, but were not based on real recorded conversations.

When helping customers at the counter, the situation was contextualized using a short description, such as "The customer, Simon Woods, would like to take one hundred thousand yen out of his account, and needs help." The actual bank form was also given. The dialogue transcript was presented to the trainees first, so that they could read and role play it, before trying to role play it again, without the scaffolded transcript, and depending on their confidence/ability. Some natural phrases were included, such as "Customer: What does this mean? (pointing to 百万) Staff: That means 1,000,000 (one million) yen."

The learners were expected to take responsibility for studying and practicing the materials in their own free time after the seminar. This included continuing to practice listening to large numbers and do writing activities, both of which were difficult for most trainees. However, in the future the materials could include more advice for the trainees about their learning strategies, possibly by adding in learning strategy tip boxes on some pages. Similarly, can-do statements could be added to the start and end of the seminar for self-evaluation.

Regarding the interactional features of the materials as shown in Table 1B in the Appendix. These focus on social interaction, conversational strategies and structure, formality and cultural differences. There was more of a focus on transactional rather than social interaction due to the aims of the course and the required banking tasks. However, one aim was to build confidence in English. The warm-up task was thus developed and updated over many training sessions. This balance was difficult to obtain because most banking interactions are simply functional interactions. As trainees were also intrinsically motivated, they wanted English communication fluency practice.

Generally, the kind of language used in the materials focused on being direct. Examples are phrases such as "please write your full name," showing an interest in what the customer is saying by paraphrasing and showing understanding through clarification and repetition. These are known as positive politeness strategies (Brown & Levinson 1987). Some negative politeness strategies (Brown & Levinson 1987) were also introduced into the materials. Examples include indirect questions such as "Would you mind if we made photocopies?" apologizing for imposition or forgiveness with comments like, "I'm sorry but we have to follow the bank and government rules." However, politeness was not overtly highlighted during the seminar; we got trainees to focus more on basic functional instructions (imperatives) and direct interrogative questions, such as "What kind of bank card would you

like?" In retrospect, trainees could have been explicitly taught that politeness was the reason for using indirect language. For all situations in which they might interact with a customer, learning polite and functional language is a priority, as opposed to flexible, interpersonal strategies for varying contexts.

Sign-posted openings, closings, and functional moves were presented through examples and role plays. We feel that more attention could be given to presenting other cultural norms of 'doing banking', so that the trainees could have examples of how banking is done in some cultures of foreign residents in Japan. An important strategy for managing cross-cultural issues is the ability to paraphrase and being able and willing to try to negotiate understanding within the interaction.

As the employees at this rural Japanese bank do not have a strong need for English, our situation was more similar to that of Wu and Chin in Taiwan than to those of Mohammadzadeh, Barati and Fatemi (2015), and Al-Khatabi's (2005) studies of bank employees in Iran and Jordan. However, tailoring the course toward the local context and using authentic realia to complete familiar work tasks gave the course a personalized approach which standard textbooks could not. This included a blend of specialized vocabulary, as recommended by Hashimoto (1994). Nguyen Khan and Le Thi (2019) suggested a communicative approach should be used for bank employees in Vietnam, and that would also be beneficial for this course giving the trainees more autonomous self-directed use of language, if there was more time. There could also be follow-up options for trainees wishing to further develop their English for banking skills. For example, we could develop seminars including email writing and intercultural awareness content to develop a sensitive and flexible attitude toward English language use.

Conclusion

The development of this banking English seminar has been improved over time as we observed trainees using the materials. The instructors were able to reflect together on the effectiveness of the materials to build trainees confidence and provide natural, interesting, and familiar modeled tasks. As an indication to the success of this course, twelve courses were run from 2019 to 2021, and bank employees requested follow-up courses in their free time, to focus on general communication skills, such as small talk and intercultural training.

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Appendix

Table 1A - A checklist for evaluating the pedagogical aspects of banking teaching materials

Needs analysis

Does the material suit the target learners' needs in terms of work experience and types of jobs?

Is the content relevant to bankers?

Does it draw on the experience of job-experienced learners?

Are the activities suitable for the target learners' levels and interests?

Learning objectives

What is/are the main learning objective(s) – general language knowledge, specialist language knowledge, general communication skills, professional communication skills, or a combination of these?

If grammar and vocabulary items are presented, are they relevant to banking tasks?

Methodological approach

What is the main methodological approach?

Is it suitable for the target learners?

Do the exercises and activities help learners to practice the language and strategies used in banking encounters?

Do the exercises and activities mirror real-life banking situations?

Naturalness of the language models

Are authentic materials or samples of authentic spoken language used?

Does the material contain features of natural speech?

Does the material cover the features of spoken grammar relevant to banking tasks?

Contextualization of the language

Does the material provide contextualized examples?

Does the material use a discourse approach to teaching banking interaction?

Learner autonomy

Are learners expected to take a degree of responsibility for their own learning?

Does the material include any advice/help to learners on learning strategies?

Are self- and peer-evaluation tasks included?

Is help given to the learners on what to look for?

Table 1B - A checklist for evaluating banking interaction teaching materials

Transactional and phatic (social interaction) talk

Is attention paid to both transactional and phatic talk?

Does the material present language for both transactional and phatic interaction?

Strategies

Are learners equipped with strategies which allow them to show both positive and negative politeness?

Does the material present the language to implement these strategies?

Formality

Does the material sensitize learners to different levels of formality?

Is the level of formality related to contextual factors and interpersonal strategies?

Does the material provide practice in using different levels of formality in different situations?

Structure of the interactions

Is the generic structure of interactions presented with appropriate language to signal the opening and closing of different phases?

Are topic management skills presented with appropriate language for signaling topic opening and closing?

Cultural differences

Does the material sensitize learners to cultural differences in banking styles?

Do activities help learners to practice the skills and strategies to handle cross-cultural issues?

Is cultural stereotyping avoided?

Articulatory Setting: An Overlooked Aspect of L2 Pronunciation?

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Abstract

The term articulatory setting, which is sometimes referred to as voice quality, or voice-setting features (Pennington and Richards, 1986), or basis of articulation (O'Connor, 1973), first coined by Beatrice Honikman (1964), refers to the specific habitual movement patterns and postures of the vocal tract and its articulators that contribute to the overall phonetic quality of a language. Proponents of this theory hold that without an understanding of how movement patterns differ cross-linguistically, second language (L2) learners will utilize the articulatory settings of their first language (L1) when speaking in their L2, thereby inhibiting them from acquiring accurate pronunciation. In line with this, there is a belief held by some researchers that teaching methods based on articulatory setting ought to be taught to learners, so they can be made aware of how to alter the movement patterns of their mouths for speaking in the target L2. This is to be done before learners are instructed in other aspects of pronunciation, such as the differences in phonemic inventories between the L1 and L2. As Thornbury (1993) puts it, the implications of this top-down approach are "that by teaching the 'whole', the bits might take care of themselves (p. 128)." In other words, if students are made aware of the holistic alterations that should be done to accurately pronounce the target language, specific difficulties might be remedied naturally. This shift in posture is conceptualized by Honikman (1964) as getting "into gear", which refers to the process of students consciously altering the positions of their articulators in preparation for speaking in the L2. This paper will elaborate on the subject of articulatory setting and its possible application to pronunciation pedagogy, summarize several studies in the field of articulatory and acoustic phonetics that support its validity as a teaching approach, and explore the application of the theory of articulatory setting to the instruction of learners in the Japanese EFL context.

Keywords: Articulatory Setting, Acoustic Phonetics, Articulatory Phonetics, L2 pronunciation, EFL pronunciation, intelligibility

Introduction

In the field of Applied Linguistics, it is agreed that what is perceived as foreign accent in the speech of an L2 speaker is greatly influenced by the phonology of the speaker's L1. These systematic differences in phonology that occur in the speech of L2 learners are known as language transfer (Zsiga, 2013, p. 459). Based on the principle of language transfer, any instructor with sufficient knowledge of the phonology of a speaker's native language can predict problematic areas of L2 pronunciation fairly easily and with relative accuracy. However, research regarding L2 pronunciation has found that accentedness is not always the primary factor in the comprehension of L2 speech. This may be counter to what is intuitively believed by many. For instance, research has indicated that an L2 speaker might be rated as having heavily accented speech yet still be highly intelligible to listeners (Munro, & Derwing, 1995). Therefore, in the last few decades, the goal of pronunciation instruction has been increased intelligibility, rather than accent reduction. This is especially important in EFL contexts, where L2 learners are more likely to communicate with other non-native speakers (NNS). For example, it has been found that native speakers are more sensitive to suprasegmental errors, while non-native speakers are more sensitive to segmental errors that result from L1 transfer (Jenkins, 2000). With this in mind, what teaching methods or exercises are the most effective at increasing the intelligibility of NNS? The next section will elaborate on the theory of articulatory setting and explain briefly how it bridges the gap between the psychological and physical dimensions of L2 phonology.

Articulatory Setting

The theoretical foundation that underlies the concept of articulatory setting is the idea that just as phonemic inventories differ across languages, so do the movement patterns and postures of the articulators. Honikman (1964) describes the concept by stating:

By articulatory setting is meant the disposition of the parts of the speech mechanism and their composite action, i.e. the just placing of the individual parts, severally and jointly, for articulation according to the phonetic substance of the language concerned. To put this another way, it is the overall arrangement and manoeuvring of the speech organs necessary for the facile accomplishment of natural utterance. Broadly, it is the fundamental groundwork which pervades and, to an extent, determines the phonetic character and specific timbre of a language. It is immanent in all that the organs do. (p. 73)

Honikman distinguishes between settings for the internal articulators (such as the tongue, velum, and pharynx) and for the external articulators (lips and cheeks) and specifies that differences in the settings of each articulator form the basis of the overall sound of a language. For instance, unsurprisingly, tongue setting is regarded by Honikman as being the most important articulator in determining the resonance of the mouth (p. 76), and in describing the articulatory setting of the tongue for English, states that:

Almost throughout English, the tongue is tethered laterally to the roof of the mouth by allowing the sides to rest along the inner surface of the upper lateral gums and teeth; the lateral rims of the tongue very seldom entirely leave this part of the roof of the mouth, whereas the tip constantly (or some other part of the dorsum occasionally) moves up and down, periodically touching the central part of the roof, but generally not for very long at a time, before it comes away. Thus, one might regard the tethered part – in this case, the lateral contact – as the anchorage, and the untethered part as the free or operative part of the tongue-setting. (p. 76)

Rather than assuming pronunciation errors to be a purely psychological phenomenon, i.e., learners have difficulty pronouncing sounds that are not present in their L1s because they

cannot perceive them, the theory of articulatory setting links perception to the actual physical movements of the mouth that condition the speech of L2 learners. According to this theory, it is the differences in the L1 settings and conditioned use of the articulators in speech that are transferred to the L2 in the speech of learners, thereby coloring the phonology of L2 speech.

The Validity of Articulatory Setting as an Approach L2 Pronunciation Pedagogy

In her book *English Phonology and Pronunciation Teaching*, Rogerson-Revell (2020) points out that articulatory setting is an area of pronunciation that has been largely overlooked in pronunciation teaching materials (p. 36). Since the concept of articulatory setting is not a recent development in the field of linguistics, one might question why it has not been applied to L2 pronunciation teaching methods. There are several reasons for this. First, the major criticism against the adoption of teaching methods based on articulatory setting is that the formulation of the theory had resulted largely from informal observations of the tendencies of speakers from different language backgrounds rather than from scientifically quantifiable methods (Wilson & Gick, 2014). Second, there is a historical reason for why articulatory setting was never earnestly adopted in the field of L2 pronunciation teaching. At the time when Honikman's article describing her theory of articulatory settings was written (1964), the prevailing view in the field of language teaching was a deemphasis on pronunciation. This was influenced by the Cognitive Approach to language teaching popular at the time, which held that all language phenomena were rule based in nature (Celce-Murcia et al., 2010, p. 5). In contrast to the 1960's deemphasis of the skill of pronunciation, pronunciation teaching in the following decade of the 1970s exhibited a heavy reliance on mimicry and repetition of speech (Celce-Murcia et al., 2010, p. 5). Since that time, the field has moved on to incorporate many findings from the various subfields of linguistics, and has emphasized different aspects of phonology, such as the importance of intelligibility and the stress-timing of English. However, given developments in

the field of phonetics there is increasing evidence for the validity of incorporating articulatory

setting into the development of L2 pronunciation teaching methods.

Findings That Support Articulatory Setting from the Field of Phonetics

The existence of unique articulatory settings for different languages is supported by

findings in the fields of acoustic and articulatory phonetics. One such finding in the field of

acoustic phonetics that relates to the concept of articulatory settings is cross-linguistic variation

in the formant frequencies of vowels. For example, the high front vowel, which is normally

transcribed in the IPA as [i], differs acoustically in Spanish and English even though the sounds

are both transcribed with the same symbol. In fact, all Spanish vowels /a, i, e, o, u/ differ

systematically in the Spanish vowel space relative to their English equivalents (Bradlow, 1995).

These acoustic differences noted by Bradlow are a result of differences in the shape of the

mouth's resonant cavity resulting from the movements and postures of the articulators during

speech. These systematic differences support the theory of articulatory setting as a valid

framework in L2 pronunciation teaching, because if there were no differences, then an /i/ in

Spanish and an /i/ in English should be exactly the same acoustically. Furthermore, if one were

to compare two equivalent vowel segments in any two languages, it is likely that the formant

frequencies would be different even though the sounds would be transcribed in the IPA with

the same symbol. To put it simply, just because linguists transcribe vowels as the same

symbols, or even may perceive them as the same sounds, does not alter the fact that there are

quantifiable acoustic differences in articulation that occur cross-linguistically. These acoustic

differences could be due to a number of postural differences such as cross-linguistic variation in

the rigidness of the tongue i.e., the extent to which the muscles of the tongue are contracting

during speech, the positioning of the tongue in the oral cavity prior to or during an utterance,

the roundedness of the lips during an utterance, etc. However, one issue that measured

differences in the formant frequencies of vowels cannot account for is how much of the differences are a result of the articulatory settings that are necessary for the articulation of specific sounds or how the distribution of sounds affects these settings.

Recent studies in the field of articulatory phonetics have also attempted to quantify language specific articulatory settings. It has been noted that in order to clearly measure articulatory settings, it is necessary to differentiate settings that are unique to the given language from the ones that are necessary for the articulation of individual phonemes. In order to investigate this topic, Gick et al. (2004) studied what they define as inter-speech posture, which refers to the positions of the articulators between utterances. By measuring inter-speech posture, it is possible to separate the underlying articulatory settings from any settings that are required for the articulation of specific sounds. In their experiments they utilized x-ray imaging to measure the inter-speech postures of speakers of French and English. What they found was that when comparing measurements taken from French speakers with English speakers, there were observable differences in lip protrusion, pharynx width, tongue height, and its distance to the alveolar ridge during inter-speech periods (Gick et al., 2004, p. 226). These findings support the validity of underlying articulatory settings, and as Gick et al. claim, have "important implications for foreign-language teaching" (Gick et al., 2004, p, 231).

Applying Articulatory Settings to the Japanese EFL Context

Regarding the teaching of pronunciation to Japanese learners in an EFL context, there are several aspects of English phonology that present difficulty for Japanese learners. First, there is significant phonological distance between the phonemic inventories of Japanese and English. Standard Japanese uses approximately 21 phonemes (Okada, 1999, p.117), if vowel length contrasts are not considered, whereas Standard American English uses approximately 35 phonemes not including diphthongs (Ladefoged, 1999, p.p. 41-42).

Second, Japanese syllable structure is quite different from English syllable structure, with Japanese using CVV, CV, CCV, and rarely CVC syllable structures, which only end in /n/. In contrast with the syllable structure of Japanese, English uses a highly complex syllable structure, which can use any combination of consonants at the beginning or end of a syllable illustrated by the syllable structure (C)(C)(C)V(C)(C)(C)(C), with the word *strength* being an example of the most complex syllable type possible in English (Maddieson, 2013).

 Finally, the metrical structure of Japanese is based on the unit of the mora rather than the stressed syllable of English. Considering these many differences, what area of pronunciation should be emphasized when instructing Japanese EFL students? One drawback of a focus on the segmental aspects of English phonology, such as vowels, is that it is extremely difficult if not impossible for adult learners to acquire non-native phonemes after a certain critical period (Nakashima, 2006). However, if teaching methods aimed at raising Japanese learners' awareness of the differences in articulatory settings between English and Japanese were used in the classroom, perhaps global improvements to these different issues in the L2 phonology of Japanese English learners could be facilitated.

One researcher that has advocated for the application of articulatory setting to pronunciation teaching in the Japanese EFL context is Junko Noguchi. In her 2014 paper, Noguchi builds a case for applying these concepts to the teaching of pronunciation to Japanese EFL students. Noguchi states that due to the differences in articulatory settings between English and Japanese, "Japanese learners may not be equipped with sufficient muscles of their articulatory organs in order to produce English sounds precisely and accurately" (Noguchi, 2014, p. 295). She believes that this could be one of the reasons why it often takes Japanese learners a long time to acquire English sounds since it takes time "to develop strength flexibility and control over the coordination of articulatory muscles, especially without any training

designed specifically for the purpose" (p. 295). Noguchi proceeds to explain how she believes English articulatory settings could be taught to Japanese EFL students, citing differences in vowel articulation, lip rounding, tongue position, and jaw movement as specific areas to be focused on. She also suggests the adoption of techniques adapted from drama in order to help warm-up and train the articulatory muscles for speech and the importance of diaphragmatic breathing to develop the muscles involved with stress pulses, which could facilitate the acquisition of English stress.

Wilson et al. (2020) investigated if the effects of jaw training could have a measurable effect on the formant frequencies of 20 Japanese English learners. The concept of jaw training was chosen because speakers tend to transfer their jaw displacement patterns, i.e., the degree to which speakers open their mouths during speech, from their L1s to their L2s. Jaw displacement has been shown to have an acoustic effect on formant frequencies of vowels, specifically the F1 formant (Wilson, et al., 2020). What Wilson et al. (2020) found was that after participants performed the training activities, they were able to alter their jaw displacement patterns as evidenced by a change in formant frequencies in before and after training recordings.

Limitations of the Approach

One major limitation of this approach to pronunciation teaching is that it heavily utilizes linguistic terminology in order to describe the ways in which articulatory settings differ cross-linguistically, and thus is by nature difficult to convey to learners. While some of the techniques prescribed by this approach may be easy for students to incorporate into their speech, such as consciously rounding the lips when pronouncing glides /j/ /w/ or the vowel /u/, how exactly does one teach students to tether their tongue laterally to the roof of the mouth? Students are likely to be unfamiliar with the linguistic terminology and lack understanding of the anatomy of the vocal tract for instructions like these to be of any use to them, and thus, be

unable to apply these directions to their own speech. Therefore, in order for articulatory setting to have any practical application to the teaching of pronunciation for L2 learners, it would require further development and for it to be broken down into easily understandable steps or practices akin to a type of workout for the articulators. Thornbury (1993) points out that the application of articulatory settings to the teaching of pronunciation should be undertaken in a discovery-based approach, where instructors are not explicitly teaching specific alterations to learners, but learners are being led to understand the subtle differences in movement patterns that are required to accurately pronounce the target language.

Conclusion

Articulatory setting is by no means a new concept in the field of language teaching; however for various reasons, it has yet to be widely adopted by the field of pronunciation instruction. These reasons include historical trends in language teaching and an inability to quantify or measure the influence of articulatory settings on cross-linguistic differences in phonology. However, due to recent advancements in the field of articulatory phonetics made possible by modern imaging technology, and the ability of any researcher to perform high-level acoustic analysis with a personal computer, there are more studies being published that support the theoretical validity of articulatory setting. These findings suggest that articulatory setting be reevaluated as a viable approach for pronunciation instruction, especially at the lower levels of instruction. Regarding its relevance to the Japanese EFL context, as Noguchi (2014) points out, Japanese speakers' undeveloped musculature prevents them from accurately pronouncing many of the common sounds in English. Therefore, some exercises geared towards prompting learners to adapt their movements to a more English-like pattern could be merited in the beginning stages of pronunciation instruction aimed at Japanese learners of English.

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Learning how to see:
understanding binocular vision and the benefits for students of art

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Abstract

What can students of art gain from learning about how their visual system works? What can the way we *see* teach us about the nature of experience or representation of space? By virtue of having two eyes, we are gifted the rich experience of three-dimensionality. Yet we are generally unaware of the complex process which makes this possible. This paper discusses activities held as part of an Interdisciplinary Art course at a liberal arts college in Japan in which students are encouraged to investigate firsthand the nature of their own visual experience. By recreating phenomena of binocular vision through a combination of drawing, 3D photography, and creating viewing devices, students can reflect on *seeing* in new and interesting ways. There are several benefits to such experimental modes of firsthand inquiry. Firstly, by encouraging visual art students to be more aware of how they interpret visual information (in essence, how they *see*) they can develop more refined methods of spatial representation, both in a physical and philosophical sense. Secondly, understanding how vision works could benefit students interested in working in creative industries involved with virtual reality (VR) technology, such as gaming and entertainment. Finally, this hands-on approach to theories of vision is accessible and exciting, helping foster an interest in contemporary critical art practice.

Keywords: 3D, stereopsis, representation of space in art

Introduction

Understanding and representing three-dimensional (3D) space is perhaps one of the most elusive skills for artists to master. Among the traditional elements of artistic representation (including line, shape, color, value, form, and texture), space offers a challenge unlike the others in its difficulty to define, rationalize, and represent in a consistent way. This challenge is evidenced by the array of spatial interpretations throughout art history: from the structured,

tabulated representations of ancient Egypt, the illusionistic realism of Renaissance linear perspective, or the Cubist conceptual treatment of multiple viewpoints synthesized into one.

Artists have long experimented with various devices to better understand space. Instrumental in the development of linear perspective, Filippo Brunelleschi used a mirror and canvas with holes in them to sketch the Florence baptistry in perfect proportions. Albrecht Dürer invented a series of drawing machines which used string grids and fixed eye positions to create images with an incredibly natural sense of depth. Yet it was the relatively recent invention of the stereoscope in the 19th century that first enabled the reproduction of true 3D as is experienced with both eyes. This paper argues that there are several benefits to art students from learning about depth perception through the creation of, and experimentation with, stereoscopic devices. After outlining the fundamentals of how we use both eyes to see in 3D, this paper will discuss ways in which such activities could be used to deepen students' understanding of how they perceive the environment and how this physiological and philosophical knowledge might assist them in their creative practice. The case study of a 3D unit taught at a liberal arts university in Japan will be introduced to illustrate concrete examples of classroom activities. Finally, student feedback will be examined.

Seeing Space

Human depth perception relies on the combination of monocular and binocular information - using one eye or both eyes together. The first category is perhaps the more familiar, and includes occlusion (closer objects overlap those further away), linear perspective (parallel lines converge in the distance), relative size (closer objects appear larger), shadow and shading (3D shapes revealed by light), aerial perspective (distant objects appear hazy due to particles in the air), and relative motion (closer objects appear to move faster). In fact, with only

one eye we can already experience a fairly rich 3D impression of the environment. However, it is by using both eyes together that we can create the "distinctive, subjective sensation" (Barry, 2009) of depth, and arguably the most convincing experience of 3D.

Stereopsis is a remarkable feature of human perception yet is often overlooked in our everyday lives. The horizontal separation between the left and right eye results in slightly mismatched images being projected onto each retina. Providing the images are close enough, the brain fuses them together to give us a convincing three-dimensional experience of the world. If the difference is too great, say we look at two very different objects at the same time (one in each eye), then one may be suppressed in a binocular rivalry (BR) experience. Despite our lack of awareness of these background processes, they are constantly at work and essential in creating the richest possible 3D experience.

Despite theories of how we see in 3D dating back to the ancient Greeks, it was not until the invention of the stereoscope (see Fig. 1) by Charles Wheatstone in the 19th century that we began to truly understand the process. Developed out of vision research in the 1820s and 1830s, the device was quickly adopted as a form of popular entertainment, helping disseminate knowledge from academic theory to practical understanding. Wheatstone's use of mirrors and open-top installations in his 1838 invention helped elucidate the complex mechanism of 3D vision by making *seeing* itself the subject of observation.
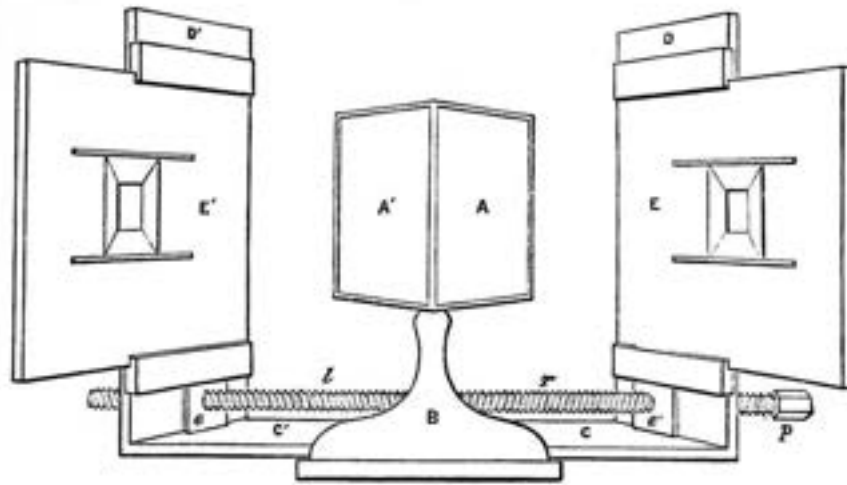
Figure 1: Wheatstone Stereoscope, 1838. Stereograms positioned at E are viewed via mirrors at A. This structure enables different images to be comfortably viewed simultaneously by each eye. Providing the images are similar enough, the brain will automatically fuse them together and create a unified experience of a single (3D) image.

Showing Space

The physiology of vision has defined the way in which artists represent space. Two-dimensional images projected onto our eyes send signals to the brain, which miraculously constructs a rich three-dimensional experience of the environment. The challenge of the artist is to reconstruct this internal experience in an (often) 2D representation.

Even though the most robust method of *perceiving* space is through stereopsis, it is interesting that *representations* of space almost exclusively rely on monocular depth perception. The use of occlusion to represent depth can be found in prehistoric paintings found in the Lascaux (c. 17,000 BCE) and Chauvet (c. 30,000 BCE) cave complexes as well as several ancient Egyptian artworks such as the Narmer Palette (c. 3100 BCE). Shadow and shading have an equally long history in art, with considerable use in ancient Greek painting and often combined with aerial perspective to create a convincing impression of space and depth.

The development of linear perspective in 15th century Renaissance Italy changed the rules of realistic representation forever, transforming the canvas from a flat plane to a "window through which we see the visible world" (Gombrich, 2014).

Looking at art through the ages, it is apparent that there are various techniques artists use to show depth. Yet, apart from disputed claims that Leonardo's Mona Lisa was created as a pair of stereoscopic images (Brooks, 2017), 3D examples are noted for their absence from art history. Binocular depth perception seems to be mostly confined to the realms of entertainment: 3D photography, film, and virtual reality. There are practical reasons for this. Viewing devices such as stereoscopes or 3D glasses are generally required to experience 3D media. The impracticality of such apparatus, and loss of immediacy of experience when appreciating the art, is perhaps mainly responsible for the lack of stereoscopic artworks. This paper, however, argues that despite the lack of stereoscopic artworks, we should not underestimate the importance of understanding stereopsis itself in the artistic learning process.

Benefits of Understanding Binocular Vision

As discussed, there are many techniques that artists use to give the illusion of depth that do not require binocular vision. However, gaining a deeper understanding of how we interpret depth using binocular vision can help art students in several ways.

Firstly, an understanding of the physiology of our visual system can give us a deeper understanding of space itself, and ultimately ways in which this can be effectively represented. It might be argued that the techniques previously mentioned for showing depth (occlusion, shadow and shading, aerial perspective, and linear perspective) developed out of studying the senses. After all, our internal model of the spatial environment depends upon two things: the environment itself, and the way in which our senses internalize this visual information.

Historically, the arts and sciences were much less specialized than they are today with Da Vinci and Dürer being two often cited examples of interdisciplinarians. Perhaps through activities which transcend disciplines, such as those listed in this paper, a curiosity to learn more about our visual system can be fostered in our students.

Students are encouraged to question the relationship between object and image through stereoscopic experiments. Stereograms are flat images until seen through a stereoscope. The miraculous 3D experience exists nowhere but in our mind. In turn, we discover that what we *see* is not the same as what we *perceive*. Crary (1992) comments that devices such as the stereoscope "made unequivocally clear" the "fabricated and hallucinatory nature" of the image and created a "rupture between perception and its object". This kind of critical inquiry as it relates to vision and visuality is an important skill for students to learn and apply to their creative practice.

VR technology is becoming ever-more widespread in the expanding gaming and entertainment industries. Opportunities for employment in these areas for university graduates are also increasing. In addition to core artistic skills, an understanding of 3D vision, on which the VR experience depends, will be a great asset to art graduates aiming to pursue a career in related fields. Firsthand experimentation with 3D devices can provide students with this understanding.

Finally, through the following activities, students are encouraged to make connections between art and other disciplines. Interdisciplinary learning that intersects perceptual psychology, healthcare, philosophy, and art, can lead to new discoveries and original thought.

The Activities

Background

The following activities were held in the Fall semester in the Interdisciplinary Art course at an undergraduate liberal arts college in Japan. The course explores art that transcends traditional boundaries and challenges the perceived division between disciplines such as psychology, brain science, and medical care. Through theoretical and practical study, students are encouraged to apply what they have learned in various practical investigations. The following activities are part of the eight-class unit: "From 3D to 2D (and back again)" in which students learn about how we see and represent depth in a physiological, philosophical, and artistic sense. The unit encourages students to consider 3D space in new and interesting ways. We do this by learning about representations of depth in an art historical framework while at the same time discovering first-hand how we create an internal 3D representation of the environment. The hope is that students can make new connections which will inform exciting directions in their creative practice. Twenty-one students took part in the following activities in the Fall semester of the 2020 academic year.

Method

First, an outline of historical methods of depth representation in art is outlined, with a focus on transformational developments such as linear perspective in the Renaissance period (Masaccio, Brunelleschi, Durer, etc.). Next, the groundbreaking 3D vision research of Charles Wheatstone is investigated, learning about how the visual system works on a physiological level, and the various devices Wheatstone invented to test his ideas. Students are then introduced to several stereoscope designs and can experiment firsthand with creating and experiencing stereograms (see Fig. 2).

Figure 2: various stereoscopic device designs used by students to experience simulated stereoscopic depth perception. Despite the differences in the various designs, the physiological principle remains the same: two slightly different images, shown simultaneously to the left and right eye, are fused by the brain to create a 3D experience.

Due to limited time, students were not able to create their own stereoscopes. Making the devices themselves is time consuming and would need to be done over several classes. However, this is a consideration for future development in the Interdisciplinary Art course. The following stages describe students' experiments with the stereoscopes.

Stage 1: making original stereograms

Stereograms are the 2D images which are fused together by use of a stereoscope to create a 3D experience. Stereograms can be drawings, photographs, or digitally produced images. The important point is that the two images illustrate the views seen by the left and right eye. The images are similar enough that when seen side-by-side without the use of a stereoscope they may appear to be identical. However, closer inspection will reveal subtle differences and when they are fused together the distinctive, subjective sensation of 3D depth

becomes apparent. Wheatstone's invention of the stereoscope came just before that of the camera. For this reason, the first recorded stereograms were in the form of drawings rather than photographs. Taking these simple, but elegant, line drawings (Fig. 3) as inspiration, students began to experiment by creating their own versions, eagerly cutting them out to view them through the stereoscopes and see if they work (Fig. 4).
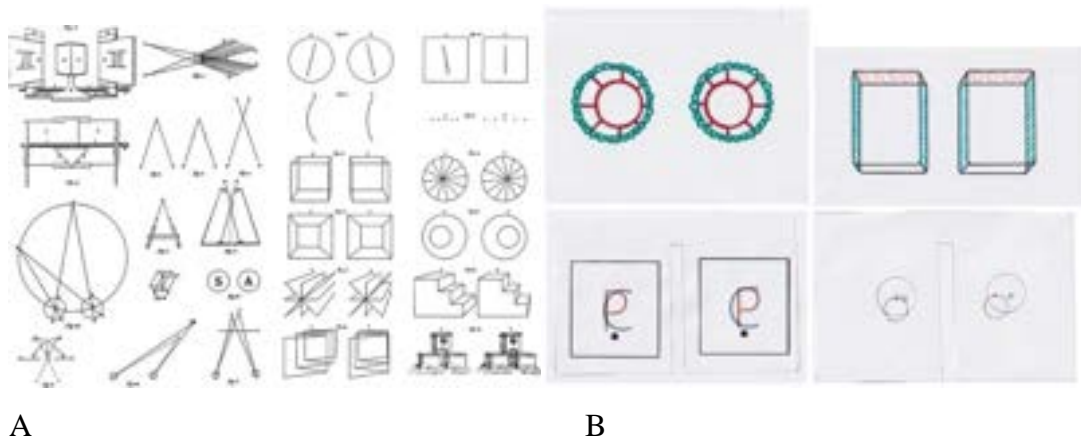

A   B

Figure 3: Charles Wheatstone's original stereogram drawings (A) used to demonstrate 3D vision by stereopsis (Plate 2 from Wheatstone 1838) and Wheatstone inspired original drawings by students (B). The left and right images are fused by viewing through a stereoscope to produce a 3D experience.

Figure 4: stereograms being viewed with a stereoscope.

Stage 2: experimenting with binocular rivalry

Through these initial trials and experiments, several students noticed something very interesting. By showing significantly different images simultaneously to the left and right eye, they found that they were unable to fuse them together. Under such circumstances, we might expect that we would perceive a mixture of the two images, one overlayed on the other. However, the result is more surprising. They noticed that they would *see* one image for a moment, then it would disappear, and the other image would come into their mind. The students noticed that these strange *flips* in their mind's eye would continue for as long as they looked at the images. They had discovered the phenomenon of binocular rivalry (BR). If the images in each eye are too different to be fused, then the brain struggles to create a coherent impression and we experience perceptual switches back and forth between the two, with one temporarily dominating our perception and the other being suppressed in an unusual bistable perceptual experience (Alais & Blake, 2005) (Fig. 5).
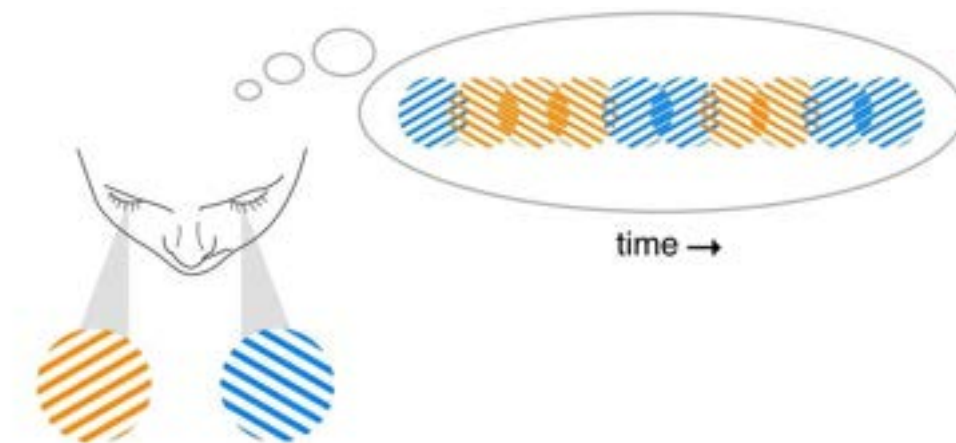
Figure 5: The phenomenon of binocular rivalry (BR). Viewed simultaneously with left and right eye, the different images will switch back and forth, temporarily dominating conscious perception.

Students experimented with hand drawn and digitally created collaged BR images. Starting off with similar left and right eye images, then gradually making them increasingly different, testing the limits to which they could push the brain's power of visual synthesis. Up to a certain point the brain can combine slightly different images together to create a single impression. However, as students discovered, if the two images pass a certain degree of dissimilarity, then the system collapses, and we experience the perceptual flips of BR. Most interesting was some student's use of different language texts: English in one eye, Japanese in the other, with a common element like a circle or square to unify the images (see Fig. 6).

Questions surrounding what happens to the suppressed image, and whether this perceptual switch can be controlled, are of great interest to vision, brain, and philosophy of mind researchers, and have led to BR being touted as an important tool in the ongoing search for the "neural correlate of consciousness" (Crick and Koch, 1998). The appeal of using BR for consciousness research is that information projected on our eyes can effectively be detached from our conscious experience (Wolfe, Kluender, & Levi, 2020). In this respect, there is a clear relationship between BR research and the "philosophic toys" (Wade, 2004) of 19th century vision research, such as the Wheatstone stereoscope. This borderland between the conscious and subconscious mind, effectively the gates of perception, has been the topic of exploration by the author both in foreign language acquisition (Hall, 2020) and interactive artwork aiming to produce emotional responses (Hall, 2013).

Figure 6: Student experiments with the unusual perceptual experience of binocular rivalry (BR). Different images shown simultaneously to each eye create a bistable image in the mind which switches uncontrollably between the two.

Stage 3: anaglyph 3D photography

Students now had a solid understanding of the mechanism behind 3D. The next step was to experiment with 3D photography. The purpose of demonstrating stereopsis using mirrored or lens-based stereoscopes was to make the principles of 3D vision explicitly clear. Students can easily understand that the left and right eye see a different image, which the brain then fuses to create 3D. In truth, however, the experience can be simulated by several different methods. One of the most accessible and inexpensive of these is the familiar red and blue anaglyph glasses. Until quite recently, the glasses were the most common way of viewing 3D films and are also suitable for demonstrating 3D photography with students.
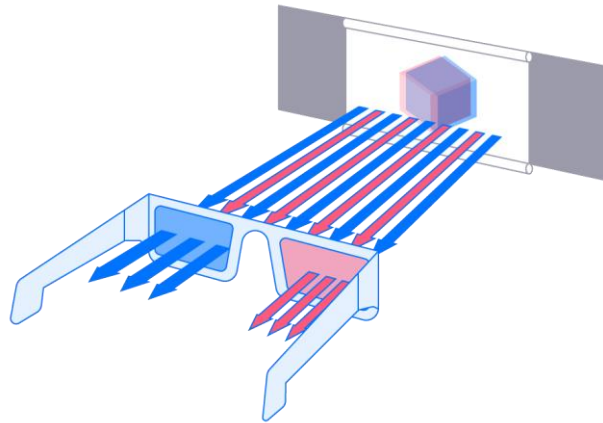
Figure 7: inexpensive anaglyph glasses can be used to demonstrate 3D photography

In normal 3D photography or film, two cameras positioned next to each other record an image simultaneously. The images capture the same scene from slightly different perspectives, mimicking the views seen from each eye. Similar still images can be created using a single camera, simply by taking one photograph, moving the camera 6cm horizontally, then taking another. This method was discussed with students, they were then set the task of creating several stereogram pairs. After the pairs of images had been created, they were edited and combined to produce a single 3D photograph. This was done using Photoshop by isolating the red, green and blue (RGB) color channels in each image. The R color channel was removed from one image, and the G and B color channel removed from the other. The images were then overlayed on top of each other. In this way, when viewed with the anaglyph glasses, each eye is shown a different image.

Students seemed excited to tackle the new challenges of working with 3D photography. While they were already accustomed to the methods and techniques involved in creating visually interesting 2D photographs, they now had to consider an additional

dimension, bringing to bear a sculptural quality to a format previously thought of as essentially flat.

Figure 8: Anaglyph photographs created by students. When viewed using anaglyph glasses, the images are experienced in 3D. With the additional third dimension, students needed to consider the sculptural quality of their photographs.

Stage 4: virtual reality (VR) experience

One of the most exciting uses of 3D imagery today is the ever-expanding area of VR. The possibilities of VR are vast; from its use in entertainment, education, health care, and the military, there is great potential for VR to disrupt traditional activities. The uniquely immersive nature of VR is so convincing that it needs to be experienced to be truly appreciated. Once experienced however, the limitless possibility becomes apparent.

Most students were familiar with the concept of VR, although few had experienced it firsthand. The VR experience was intentionally held at the end of the unit, after students had

gained a deep understanding of how 3D experiences are created. With this knowledge, they could approach the technology with the eyes of a researcher, curious to begin a new experiment, rather than a consumer of entertainment. VR headsets are designed to hide the mechanism behind the experience as much as possible, focusing the user's attention on the experience itself. Coming with the knowledge gained from the previous activities, students were able to see through the "black box" and confront the experience with the informed curiosity of a scientist.

Figure 9: the VR experience came at the end of the unit and drew on knowledge gained throughout previous activities.

Student Feedback

A student survey was conducted at the end of the 3D unit. Due to some absences, 17 out of 21 student responses were recorded. According to student responses, their understanding of 3D vision greatly improved during the unit. Before studying the unit, most students (82.3%) had "limited" or "no understanding of how we see in 3D". After finishing the unit, all students reported having at least "some understanding", and 76.5% reported they have "a deep understanding of how we see in 3D" (Fig. 10).
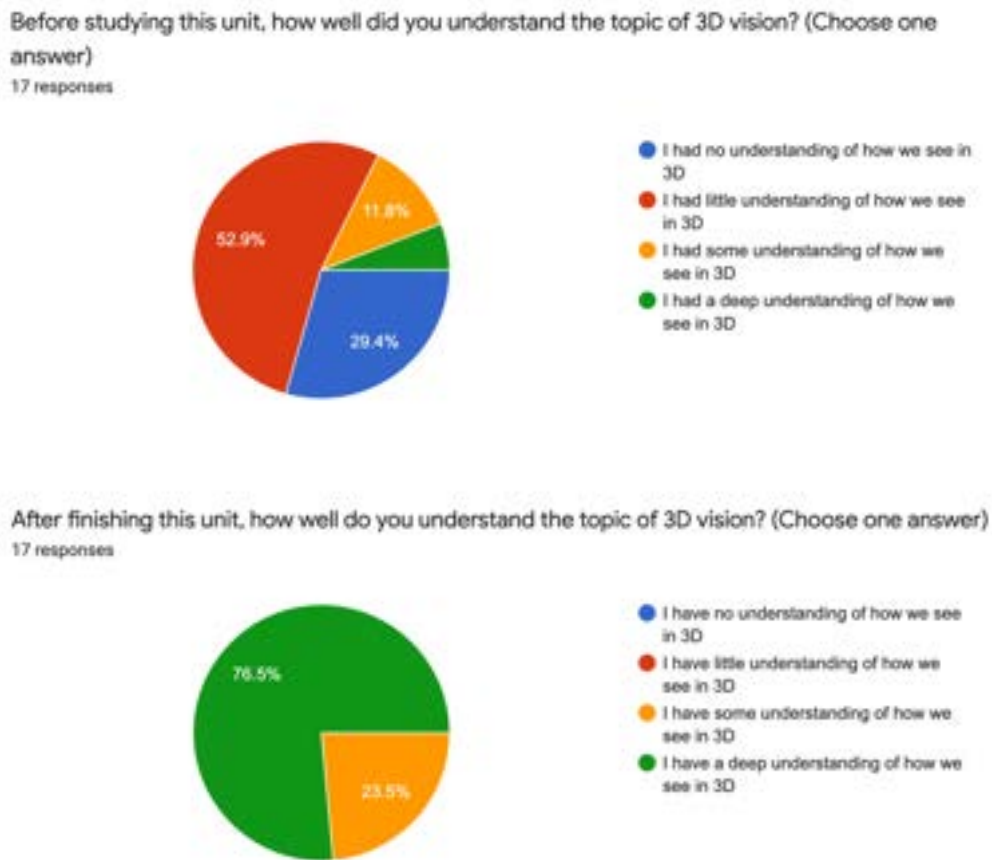
Before studying this unit, how well did you understand the topic of 3D vision? (Choose one answer)

17 responses

- I had no understanding of how we see in 3D
- I had little understanding of how we see in 3D
- I had some understanding of how we see in 3D
- I had a deep understanding of how we see in 3D

52.9%

11.8%

29.4%

After finishing this unit, how well do you understand the topic of 3D vision? (Choose one answer)

17 responses

- I have no understanding of how we see in 3D
- I have little understanding of how we see in 3D
- I have some understanding of how we see in 3D
- I have a deep understanding of how we see in 3D

76.5%

23.5%

Figure 10: student understanding of 3D vision greatly improved during the unit.

It was eye-opening to see students' responses when asked what they found interesting about the unit. Despite the unit being part of a visual art course, comparatively few students were interested in learning about artistic techniques to show 3D space (35%), while learning about how the visual system works, a topic normally reserved for science classes, was apparently more interesting (64.7%). Perhaps unsurprisingly, the most interesting aspect was experiencing VR (76.5%). While it is hoped that this positive response was helped by the order in which the activity came (at the end of the unit; drawing on knowledge gained about 3D vision), further research is needed to prove this.
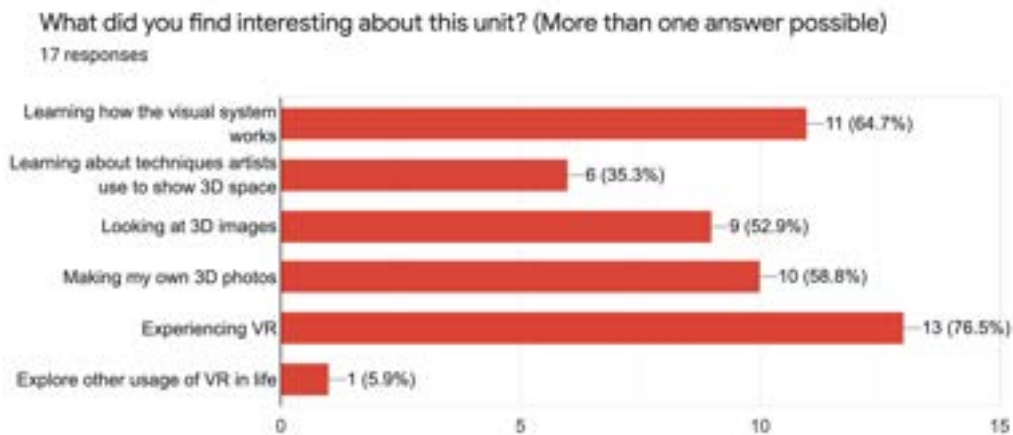
What did you find interesting about this unit? (More than one answer possible)
17 responses

Figure 11: student responses when asked about their interest in the activities was surprising.

Student responses to the open question "what was most interesting about this unit?" seemed to support the notion that a combination of theoretical and practical activities is most engaging. One student answered: "*As I personally like to learn theories best, I enjoyed learning the theories and principles of how we perceive things in 3-D and how artists produce 3-D effects in their artworks*", while another responded "*It looked 3D and the experience of using VR was interesting. But what was most interesting was that I was able to understand its structure.*"

Conclusion

Representations of spatial depth in art have varied throughout history and across cultures. While there have certainly been important developments, such as linear perspective, the lack of any persistent method or rules suggests that notions of spatial representation are complex, and perhaps reflections of contemporary thought and technological developments. The understanding of stereopsis in the 19th century was a landmark discovery in our understanding of how we see depth. This paper argued that there are several benefits to art

students from learning about the principles of stereoscopic vision through firsthand experiments, including: a deeper understanding of our spatial environment and how we might represent it, a critical awareness of the relationship between object and image, and increased opportunities for pursuing a career in creative industries which rely on 3D technology.

The activities outlined in the second half of the paper suggest ways in which these concepts might be explored by students in creative and engaging ways. While the possibility of introducing activities such as these depends on many factors, such as available resources, time, and student motivation, most could easily be adapted to be suitable for a range of educational environments.

Figures

All images were made by the author or students. Except:

Figure 1: [PSM V21 D049 Wheatstone stereoscope 1.jpg] (2010). Retrieved from
https://commons.wikimedia.org/wiki/File:PSM_V21_D049_Wheatstone_stereoscope_
1.jpg#filelinks

Figure 3 (A): Wheatstone C., 1838 `Contributions to the physiology of vision - Part the first. On some remarkable, and hitherto unobserved, phenomena of binocular vision" Philosophical Transactions of the Royal Society of London 128 371-394

Figure 7: Retrieved from https://courses.vrtl.academy/lessons/whats-up-with-stereoscopic-and-virtual-reality/

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Hard-CLIL による大学専門科目の授業：理論と実践

Theory and Practice of a Hard-CLIL-typed Major Class at College

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Abstract: This paper discusses the theory and practice of a Hard-CLIL-typed class entitled "Topics in American Literature" for junior and senior students at Miyazaki International College, where almost all the classes are conducted in English. Despite of this all-English environment, it is still important for students to improve their English ability as well as to learn the contents of the class. As the class survey shows, students enjoy my Hard-CLIL class, in which their Cognition is especially developed through the learning process of research, analysis, interpretation, and discussion in English about literary texts (Content) in a group and in a whole class(Community & Communication).

Keywords: CLILL、英語教育、英語による授業、アクティブラーニング、English for Academic Purposes、

I. はじめに

　「英語の授業は原則、英語でおこなう」と学習指導要領に記されているため、高校や中学校では、英語による授業は年々増えてきている。一方、大学の英語の授業はどうかといえば、英語を専門とする課程においても、すべて英語で授業をしている大学はまだ少ないのが現状である。筆者はこれまで CLIL（Content and Language Integrated Learning 内容言語統合型学習）方式を導入して、佐賀大学の一般教養科目を英語で行う試みをおこなってきた[1]。Soft-CLIL を導入し、リベラルアーツの内容を英語で学ぶことでグローバルな人材の育成を目指した。

　今年度から宮崎国際大学の教員となったが、本学は授業全てを英語で行っている特異な大学である[2]。そこで筆者が教授法として選んだのは、やはり CLIL である。使用言語が英語に限定されている環境(EMI=English-Medium Instruction)で、し

かも専門の内容となればイマージョンや CBI（Content-Based Instruction）も考えられるが、学生は授業内容だけでなく英語力もさらに強化する必要があると考え、Hard-CLIL を導入することにした。

　よって本論では、専門課程での「アメリカ文学の課題」(Topics in American Literature)の授業を Hard-CLIL 方式で全て英語で行った理論的根拠と授業の実践報告、さらに授業評価を行い効果的な授業のあり方について考察する。

II. なぜ CLIL か？

1.学生の英語力

　宮崎国際大学は全ての授業を英語で行なっているので、英語力は他大学の学生に比べると高い。以下は 2017 年度入学生の TOEIC(R&W)の平均スコアの推移である。

入学時 (2017)	2 年次 (2018)	3 年次 (2019)	卒業時 (2022)
347	480	580	675

　3 年次生への進級の条件が TOEIC500 以上となっているので、上記のスコアが維持されている。「アメリカ文学の課題」の授業は 3・4 年生対象なので、受講学生の英語力は TOEIC 平均 580 点である。

2. なぜ CLIL か？

　上記のような英語環境であれば、CLIL ではなくイマージョンや CBI ではないかという意見もあるかもしれない。そこで CLIL とイマージョン教育の違いを明確にしておく必要がある。

　Marsh はイマージョンなどの教育はネイティブ・レベルの英語を目標としているのに対して、CLIL は英語学習者を目標にしていると、その違いを説明している。

> CLIL is based on the same principles underlying successful immersion programmes, such as adequate teacher training, parental support, positive attitudes on the part of the families and the community, high prestige of the programmes, etc. However, full immersion and

CLIL differ in the aims they try to achieve. In particular, while full immersion offers a more intensive contact with the target language and aims at native-like or near native-like competence in the target language, CLIL offers a less intensive contact with the target language and aims at achieving a functional competence. Furthermore, because CLIL may be suitably integrated within the regular curriculum at compulsory school, it may constitute the only realistic way of increasing the competence in foreign languages of the largest number of young citizens. (36)

日本のように英語が日常的に使用されていない環境下だったり、義務教育の中での英語の授業では CLIL が適している。Met も同様に、CLIL が対象とする学習者の英語能力の幅は広く、他の学習法のようにある特定の英語力の優れたグループだけに有効なのではないと述べている。

What is significant here is the way in which language learning, particularly when integrated with content learning or knowledge construction, has now been opened up for a broad range of learners, not only those from privileged or otherwise elite backgrounds. (2)

CLIL は「4 つの C」、つまり Content(内容)、Communication(言語能力)、Cognition（認知能力）、そして Community(協働学習)を目指している点が重要であるが、さらに注目すべきは、「4 つの C」の中でも Cognition が重視されている点である[3]。課題についてリサーチしたり、考えたり、議論しあったりする「学習の過程」を重視している。よって教員の役割は Coyle at al.が述べているように、「知識の提供者」(donor of knowledge)ではなく「ファシリテーター」に徹することが求められる。

Much CLIL classroom practice involves the learners being active participants in developing their potential for acquiring knowledge and skills(education) through a process of inquiry (research) and by using complex cognitive processes and means for problem solving(innovation). When the teacher pulls back from being the donor of knowledge and becomes the facilitator, as is often found in CLIL proactive, forces are

unleashed which empower learners to acquire knowledge whilst actively engaging their own and peer-group powers of perception, communication and reasoning. (5-6)

この指導法はアクティブラーニングの考え方と合致する。教員はアクティブラーニングによって、主体的に学ぶ場を提供し、学生の認知機能を高めることが求められる。

　CLIL の認知機能の考えは、Bloom(1956) が提唱した Taxonomy が土台にある[4]。学生には記憶(Remembering)、理解(Understanding)、応用(Applying)、分析(Analysing)といった学習過程を段階的に踏ませる授業設計が必要である。「4 つの C」の中の Community/Communication は、Cognition を得るための学習環境として必要である。

　上記のような理由で、大学の専門課程の内容を英語力がある程度ある学生に対して行う場合でも、CLIL に基づいた指導法こそ適切であり、日本の大学での英語での授業に合致した指導法であると考える。

III.授業実践
　前章での理論を踏まえて、授業を設計・実施した内容を用いて具体的にその導入方法や授業の進め方を考察する。

1. Hard-CLIL で
　本授業の学生は TOEIC の平均スコア 580 点以上あり、大学の方針として完全に英語での授業が義務付けられているので、たとえ日本人教員であっても全て英語で行わなければならない。また受講生には日本語が全く理解できない留学生（今回は留学生 2 名を含む 32 名のクラス）もいる。従って授業は Hard-CLIL となる。

2. Hard-CLIL のための支援策
　CLIL を成功させるのに最も大事なことは授業の支援策にある。本授業では Ball et al.(2015)と Hellekjær (2010)の具体的な提案を参考にして、以下の 4 点を主要な支援策とし、授業計画および授業展開を行った。

(1) Visual Aids

　英語の音だけに頼っていては教員にも学生にも不安が残る。よって視覚的なサポートが必要である。筆者はパワーポイントを使って重要なことがわかるようにしている。学生とのディスカッションも、思考過程が大事なので、質問から解答を得るまでのポイントを筋道に沿って、できるだけ図解をしたものを準備する。

(2) Teacher's Talking Skills

　Hellekjærは教員のスピーキング能力が極めて重要な課題であると指摘している。

> To return to the language difficulties found in the present study, the perhaps most important problem was that the respondents found that words and expressions used in the lectures were not clearly pronounced and understandable. This means it is important to help lecturers speak clearly and distinctly. On the one hand, it could mean working with pronunciation, stress and word segmentation; on the other it might mean screening EM lecturers with regard to their English proficiency. (248)

外国語での授業は、母国語での授業以上に話し方を意識する必要がある。そこで教員の話し方についての留意点を挙げておきたい。

　①Accessible and Interactive Talking Style
　　CLILは教員がファシリテーターの役をして、認知機能を鍛えることが重要なので、学生とのやりとりをうまく行う必要がある。そのためにはインタラクティブで親しみのある話し方が求められる。
　②Learner-Understandable Expression
　　専門用語であれ、学生の理解できる英語を使って具体的に例を挙げながら教える必要がある。さらに学生の発言する英語に関しても内容重視でSoft-tuneで喋りやすい環境の構築を心がけるべきである。
　③Clear Speaking

Hellekjær が述べているように、明瞭な発音でストレスや文の切り方、スピードなど学生の理解に合わせた話し方を心がけるべきである。

(3) Feedback

　母国語での授業以上に心がけ定期的にフィードバックを行うべきである。本授業では各テーマが終わったらエッセイライティングを課し、二つのテーマが終わるごとにフィードバックの時間を設けている。

(4) Well-structured Lectures and Systematic questions

Hellekjær 授業の流れが重要であると、以下のように説明している。

> … in order to help students follow the lecturers' line of thought, it is important to ensure that lectures are well structured. It is also important that lecturers provide information about where they are and where they are going in their lecturers.   This is called "[i]interactive discourse structuring—the use of metadiscoursive [signposting] comments such as 'First, let's look at' or 'what I will do new is' –can also facilitate lecture comprehension, particularly for L2 listeners. (249)

　学生にわかるようなディスコース・マーカーを使いながら、授業の流れを認識させ、決して迷子にしないことが大事である。

　また、分かりやすい簡単な質問から徐々に核心に触れる質問へとシステマティックに段階を追って与える必要がある。そのような学習過程で培われる思考力や論理性が認知機能を鍛えることに繋がり、理解も実感できるはずである。

3. シラバス

　上記で指摘した点を踏まえ授業計画を立てている。本学では一つの科目を週 2 回行う(単位は講義科目という分類で 4 単位)ので 30 コマ分の授業計画となる。シラバスは以下のとおりである。

<Course Description>

This course will focus upon major literary topics in American Literature in their historical and cultural contexts. For that purpose, we will analyze and interpret some important texts that represent those literary topics which are rooted in, and compos American Literature. Those topics are: Transcendentalism, Nature & Civilization, Lost Generation, Modernism, Ethnicity, Feminism, Capitalism, and Narration. Through reading and interpreting the texts, and discussing the themes in the texts in a group and in class, and presenting their ideas and opinions, students will be able to understand the topics in concrete forms and grasp the essence of American Literature. Besides, essay writing on each topic cultivates students' critical thinking, text analysis competence as well as academic writing skills.

アメリカ文学の重要なテーマである Transcendentalism, Nature & Civilization, Lost Generation, Modernism, Ethnicity, Feminism, Capitalism, Narration の 8 つについて英語の原文を使用し、その作品の分析と解釈を行う。各テーマに関しての英語のエッセイを課すことで、アカデミックな英語論文の書き方はもとより、論理的思考力、クリティカル・シンキングの力も養う。

<Objectives>

  Students will be able to obtain a deep understanding of major literary topics in American Literature through reading and discussing the texts in English, and to learn about some literary perspectives through which to analyze and interpret literary texts. By reading major texts and understanding the major topics, students will be able to have a clear specific image of American Literature as a whole. All activities are done all in English, so students will also be able to acquire a high level of English communication skill and critical thinking.

文学作品を原文で読み解くことで、英語読解力、分析能力、解釈力を養い、与えられた問いに関してグループやクラスでのディスカッションを通して、思考力、リサーチ力、オーラル・コミュニケーション能力を育成し、最後にエッセイを書くことで、ライティング能力、論理的表現力を習得することを目的としている。

<Course Schedule>

Day	Topic	Content/Activities
1	Introduction to the Class Goals:	Class Orientation (Syllabus)
2	**UNIT 1:**	Emerson, *Nature;* Thoreau, *Walden;* Whitman, "The Song of Myself"

		Transcendentalism	
3			Group Discussion about the texts and the topic
4			Class Discussion and Essay Writing about the topic
5		**UNIT 2:** Nature & Civilization	Twain, *Adventures of Huckleberry Finn;* Hemingway, *The Old Man and the Sea;* Faulkner, "The Bear";Salinger, *The Catcher in the Rye*; Silko, *Gardens in the Dunes*; Kerouac, *On the Road*
6			Group Discussion about the texts and the topic
7			Class Discussion and Essay Writing about the topic
8		Feedback for writing academic papers (1)	Essay Structure -Checking Literary Technical Terms -Grammar Check -Useful Expressions for Academic papers
9		**Unit 3:** Lost Generation	Eliot, *The Waste Land;* Hemingway, *The Sun Also Rises;* Fitzgerald, *The Great Gatsby;* Faulkner, *Soldiers' Pay*
10			Group Discussion and Essay Writing about the topic
11			Class Discussion and Essay Writing about the topic
12		**Unit 4:** Modernism	Faulkner, *The Sound and the Fury, As I Lay Dying;* Hemingway, *The Sun Also Rises;* e.e. cummings' poems
13			Group Discussion about the texts and the topi
14			Class Discussion and Essay Writing about the topic
15		*Mid-term examination*	
16		*Mid-term examination Feedback*	Checking Answers and Correction
17		**Unit 5:** Ethnicity	Ellison, *Invisible Man* ;Morrison, *The Bluest Eye;*Walker, *The Color Purple;* Leslie Silko, *Ceremony;*Yamamoto, "The Seventeen Syllables"
18			Group Discussion about the texts and the topic
19			Class Discussion and Essay Writing about the topic
20		**Unit 6:** Feminism	Chopin, *The Awakening,*"The Story of an Hour";Gilman, "The Yellow Wallpaper"; Hawthorne, *The Scarlet Letter*; Walker, *The Color Purple*
21			Group Discussion about the texts and the topic
22			Class Discussion and Essay Writing about the topic
23		Feedback for writing academic papers(2)	-Checking Literary Technical Terms -Grammar Check
24		**Unit 7:** Capitalism	Franklin, *Autobiography*; Dreiser, *An American Tragedy, Financier;* Fitzgerald, *The Great Gatsby;* Faulkner, *If I Forget Thee, Jerusalem; Salinger, The Catcher in the Rye;* Miller, *Death of a Salesman*
25			Group Discussion about the texts and the topic
26			Class Discussion and Essay Writing about the topic
27		**Unit 8:** Narration	Twain, *Adventures of Huckleberry Finn;* Fitzgerald, *The Great Gatsby;* Faulkner, "A Rose for Emily"; Poe,"The Tell-tale Heart"; McInerny, *Bright Lights, Big Cities*
28			Group Discussion about the texts and the topic
29			Class Discussion and Essay Writing about the topic
30		Feedback for writing academic papers (3)	Essay Structure -Checking Literary Technical Terms -Grammar Check
		Final Exam	

4.活動内容

(1)グループ・ディスカッション

　各テーマとそれに関連した作品の一部を抜粋して、それぞれに設問を設けたハンドアウトを事前に配布しておく。学生は解答を予め準備しグループ・ディスカッションに臨む。設問の難易度によって配点を決めている。学生たちは活動が点

数化されているため、他のグループに負けまいと熱心にリサーチし正解を導き出そうとしている。

(2)クラス・ディスカッションによる対話的講義

　学生は完全に予習が終わった段階で授業に臨むことになる。教員が学生に問いかける形で学生に発表の機会を与えながら対話的なスタイルで進める。答えやすい質問から徐々に段階を踏んで解答にたどり着けるようにシステマティックに質問を準備しておくことが大事である。

(3)エッセイライティング

　一つのテーマごとにエッセイライティングを課す。毎回600語以上で質問形式で何を書くべきかを指示している。エッセイは内容10点、英語表現・文法10点とに分けて点数をつけて返却する。内容が重視されるべきあるが、同時に英語力の強化も必要であるので、このような配点にしている。
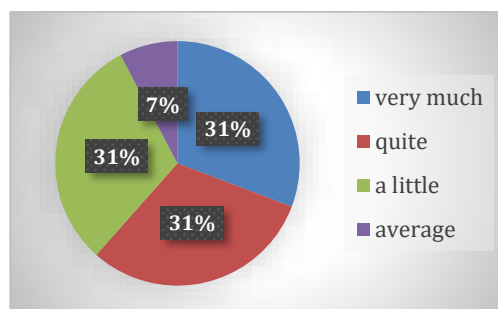
(4)フィードバック

　Hard-CLILでは、常に学生の理解を確認（assessment）し、丁寧にフィードバックをすることは大変重要である。教員は、それらの点を明確にし、どこに問題があるかを探りフィードバックを行なう必要がある。エッセイに関しては、学生が共通して間違っている文法事項、英語表現などを全体でフィードバックする。
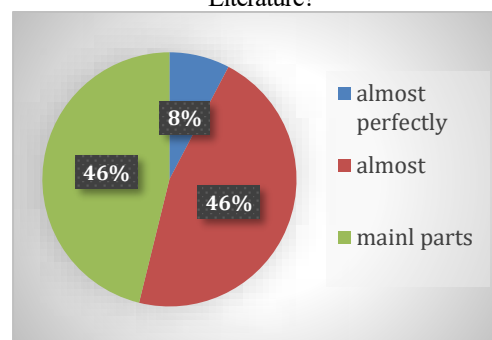
Ⅳ. 考察：評価と今後の課題

1. 授業アンケートから見る学生の反応

　30回の授業終了後、Google Formを使って授業アンケートを実施した。32名中26名から回答が得られた（回収率81.2%）。以下はその結果をグラフ化したものである。

Q1) 授業を通して、アメリカ文学に
● どの程度興味を持ちましたか。
● 大いに興味をもった。(very much)
● かなり興味をもった。(quite)
● 少し興味をもった。(a little)
● 普通。(normal)
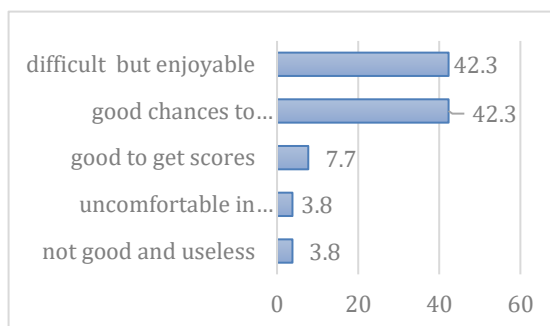● あまり興味がもてなかった。(little)
● 全然興味が持てなかった。(no)

Q1) How much interest have you got in American Literature?

Q2) 英語による専門の授業でしたが、
どの程度理解できましたか。
● ほぼ完全に理解できた。（over 80%）
● 大体理解できた。（70%）
● 基本的な部分は理解できた。（60%）
● 半分以下しか理解できなかった。
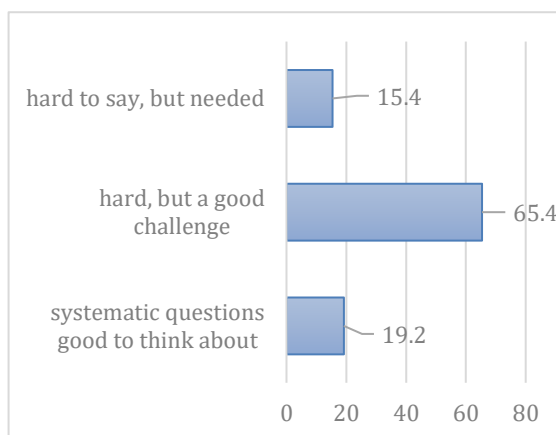　（less than 50%）
● 理解できない部分が多かった（40%）
● ほとんど理解できなかった（30%）

Q2) How much did you understand the lecture done in English ?

Q3)グループディスカッションはどうでしたか。難し内容であったが、楽しくできた。
(difficult but enjoyable)
● いろいろな人の考えを聞くことができてよかった。(good chances to know different ideas)
● 結果が点数されるので、がんばれた。(good to get scores)
● 意見を出し合うのが好きではなかった。(uncomfortable in talking about opinions)
● あまり有効でないので、ない方がよかった。(not good and useless)

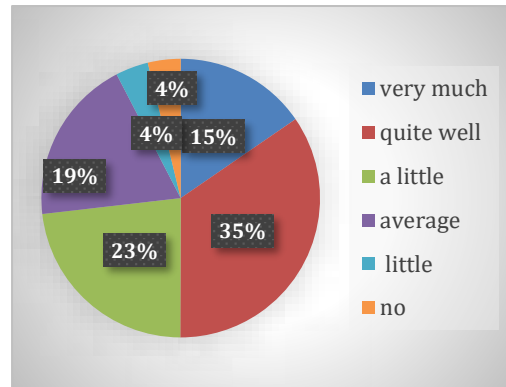Q3) How was the group discussion?

Q4)クラス全体でのディスカッションはどうでしたか。全体の中で意見は述べにくいが、必要。(hard to say something, but needed)
● 人前で英語で意見を述べるのは難しいが、
チャレンジの場として良い。
(hard, but a good chance for challenge)
● 段階的な質問で考えやすかった。
(systematic questions are good to think about)
● 人前で英語で意見を述べるのは難しいので、ないほうがよかった(useless, because it is too hard to say in public)
● 議論についていけなかった。
(I cannot understand the discussion)
● みんなで議論してもあまり意味がない。
(useless to discuss together in class)

Q4) How was the class discussion?
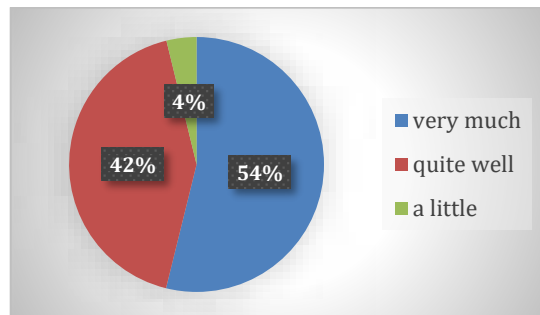
Q5)エッセイライティングはどの程度、
役立ちましたか。

- とても役だった。(Very much)
- かなり役だった。(Quite well)
- 少し役立った。(A little)
- ふつう。(average)
- あまり役立たなかった。(little)
- 役立たなかった。(Not at all)

Q5) How useful was the essay writing？

(Q6)パワーポイントのスライドはどうでした
か。
- とても役だった。(Very much)
- かなり役だった。(Quite well)
- 少し役立った。(A little)
- ふつう。(average)
- 役立たなかった。(Not at all)

6) How much useful are the PowerPoint slides

(Q7)この授業を通して、どの程度、英語力
（４技能全般）が高まりましたか。

- 大変(Very much)
- やや(Quite well)
- すこし(A little)
- ほとんど高まらなかった。(Not at all)

Q7) How much has this class improved your English
ability?

　CLIL 型の授業は内容と言語の両面を養成することを目指している。その点で
見れば授業を通してアメリカ文学に興味を持ってもらい、英語力も強化するとい
うことが第一の評価ポイントなる。「興味の度合」（Q1）に対して、「大いに
興味をもった」と「かなり興味を持った」を合わせると６割を超えており、かつ
「４技能の向上」（Q7）に関して、「大変高まった」と「やや高まった」を合
わせると７割を超えている。以上のことから CLIL 型の授業で内容と言語の両面
を目的として計画実施した本授業の主目的は、ほぼ達成できたと言えるだろう。
さらに授業の理解度に関する質問（Q2）においても「ほぼ完全に理解できた」

と「だいたい理解できた」で５割を超えており、さらに「基本的な部分は理解できた」を加えると、９割以上の学生が「授業の60%以上を理解した」と感じている。

　このような結果を得られた要因はどこにあるのだろうか。(Q3)「グループ・ディスカッション」に関して、「難しい内容であったが楽しかった」と「いろいろな人の考えを聞くことができた」を合わせると８割を超えている。課題は大変であったが、グループで調べ意見を出しあうことを、ほとんどの学生がプラスに捉えている。また（Q4）「クラス全体でのディスカッション」に関しては、「全体の中で意見は述べにくいが、必要である」「人前で英語で意見を述べるのは難しいが、チャレンジの場として良い」「システマティックな質問で考えやすかった」で100%になって。学生たちがクラス全体でのディスカッションに対して積極的に受け止めている。講義をクラス・ディスカッションという形で進めたことが良かったと言える。

　エッセイ（Q5）は合計で８本課したが、「とても役立った」「かなり役立った」を合わせると７割を超えている。学生たちにとってはかなり大変な課題であったが、ここでの英語力のチェックが役に立ったと感じていると思われる。「パワーポイント」(Q6)に関しては、「とても役立った」「かなり役立った」を合わせると９割を超えている。Visual Aidsが十分効果を発揮している。

　以上のアンケートの結果が示すように、本授業で筆者が意図したことが学生にうまく伝わり、全て英語による専門の高度な内容であったが、ほぼ理解し、併せて英語力も強化できたと実感している。CLIL型の授業の成果が十分発揮されたと言えるのではないだろうか。

2. 課題及び改善点

　CLIL型で計画実施した授業は、ほぼ期待通りの成果を得ることができたが、今後の課題として以下の点が挙げられる。

(1) 個人の発表の機会を増やすことで、スピーキングの強化

　４技能の観点から見るとスピーキングの部分が少ない。クラス・ディスカッションは人数も多いために、よくできる学生の話す機会はあるが、そうでない学生

には話す機会が極端に少ない。グループでのプレゼンテーションなどを取り入れたりペアーでの議論の機会を増やしたりする工夫が必要である。

(2)グループ・ディスカッションのやり方の工夫

グループでのディスカッションに対してネガティブな意見が２割以下ではあるが出ている。また積極的に参加する学生ばかりではなく、ほとんど意見を述べないでただ参加している学生もいる。もっと効果的なやり方を考案し、具体的に指示する必要があるだろう。

(3)専門用語や要約等の配布

「言語支援策」はほぼパワーポイントのスライドに頼っている。それ以外にも専門用語をまとめたもの、講義の要約、資料などがあれば、もっと理解が確実なものになると思われる。

(4)小テストの実施

フィードバックの時間を定期的に授業計画にも入れ、また中間試験も入れているが、基本的な語句の理解、重要事項などは、小テストを行うことにより理解が確実なものになると考えられる。

(5) 参考文献の活用法

課題を考える際に学生が主に使っているのがインターネット上の資料である。やはり概略的で浅薄で具体性に欠ける。専門的な文献を教員の方で提示して、活用させるということが必要である。それによって学生たちの読解力、分析力、さらには理解も深くなる。

最後に

今回は４年間の授業全てを英語で行うことが義務付けられている環境での専門の授業での CLIL 型授業の試みであった。本学のような英語に恵まれた環境でも、やはり英語力は学習の途中であり、専門の授業を十分に受けられるほどの力はない。そうなると専門的な内容を教えながら同時に英語力も強化するというのが重要な観点となる。そのためには CLIL の可能性は非常に高いと言えるだろう。目下、多くの日本の大学でキャンパスのグローバル化や留学生獲得の目的で英語による授業がどんどん増えてきているが、CLIL は大きな解決策になるはずである。

注

[1] 早瀬（2020）を参照。

[2] 朝日新聞社が行う大学ランキング 2021 年度版において、本学の外国人教員比率は 81.8%で全国一位である。

[3] Kavanagh も"They emphasize the importance of cognitive engagement that facilitates effective learning."(277) と述べている。白石も他の指導法との差異に関して、「CLIL がその教育方法において、Bruner らの学習理論の他様々な第二学習理論の成果を取り入れている点と、効果的な学習を促進するために認知機能の利用の重要性を強調している」(8)と指摘しいている。

[4] 実際には Coyle et al.が "This transparent connecting of thinking process to knowledge construction resonates with conceptualizing content learning in the CLIL setting."(30)と述べているように、Anderson と Krathwohl が改訂した Taxonomy に依拠している。Bloom 版との違いは、Evaluating と Creating の順番を入れ替え、さらに "The Knowledge Dimension"を追加し、それらを 4 つの種類に分類している点である。

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A Gramscian organic intellectual: Stuart Hall and British Cultural Studies in the age of Thatcher and Blair

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Abstract: This article explores the biography, intellectual influences, and political advocacy of the leading British cultural theorist Stuart Hall. The article elucidates the influence of two Marxist thinkers on Hall's thought, Louis Althusser and Antonio Gramsci. I first highlight the influence of Louis Althusser's structuralism and the concept of *interpellation* on Hall's critiques of British society in the 1970s. Then, I explain why Hall increasingly turned to Antonio Gramsci's unorthodox engagement with Marxism. The article argues that Gramscian concepts guided Hall's scholarly engagement with British politics and society and public advocacy until his death. The article is organized into three sections. The first part introduces Hall's background and his seminal contribution to the emergence of British cultural studies in the 1950s. The second part examines the ways in which Althusser and Gramsci influenced Hall in the 1960s-80s, and how he wielded their theories to critique British media and racism in the 1970s, and the Social Democratic consensus in the 1980s. The third section concludes with the organic intellectual Stuart Hall who deftly brandished Gramscian thought in his devastating critiques of Thatcherism and New Labour in the 1980s-90s.

After Stuart Hall's death at 82 in 2014, journalists and fellow scholars lauded him as an "intellectual giant," one of the "most significant intellectuals of our time," even "Godfather of multiculturalism" and, hyperbolically, "High Priest of the New Left."[1] A former professor at the Open University, Stuart Hall was one of the most visible and influential British public intellectuals, in spite of a migrant background and black skin in a society riven with inequality,

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[1] Marcus Williamson, "Professor Stuart Hall: Sociologist and pioneer in the field of cultural studies whose work explored the concept of Britishness," *The Independent*, 11 February 2014. Geoff Eley, "Stuart Hall, 1932-2014," *History Workshop Journal*, Volume 79, Issue 1, (Spring 2015): 303–320. "'Godfather of multiculturalism' Stuart Hall dies aged 82," *The Guardian*, 10 February 2014. Matthew Reisz, "Scholars recall Stuart Hall, 'High priest of the New Left,'" *Times Higher Education* (February 14, 2010).

racism, and xenophobia. Hall wrote pioneering essays and collaborative volumes on media studies, race, cultural identity, diasporic culture, multiculturalism, and Thatcherism. Hall's scholarship redefined culture as a terrain of struggle. His theoretical concepts are invaluable tools for scholars working on exposing racism, gender discrimination, and neoliberal populism, all of which remain major challenges to contemporary society and politics in Britain and across the whole world. This article examines the intellectual debt that Stuart Hall owes to Louis Althusser and Antonio Gramsci, two unorthodox Marxist thinkers. After a period of intense engagement with Althusser, Hall turned decisively to Gramsci's work which guided Hall's intellectual path since the mid-1970s. Engagement with Gramsci was vital for Hall's scholarly work and political advocacy during the era of Thatcherism and New Labour.

I. The making of a diasporic organic intellectual

Born in British Jamaica in 1932, Hall was the offspring of a comfortable black middle-class family. As young boy, Hall felt the sting of racist discrimination which reached even inside his own home. Hall's mother, a light-skinned black Jamaican who looked to Britain as a beneficent motherland and as the repository of high culture, had internalized the inferiority complex instilled by positivist-inspired education from the Victorian Era. Her objection to her daughter's dating of a man she deemed to be "too black" triggered a family crisis, and in Hall's view, destroyed his sister's life. In short, Hall's 1951 arrival in Britain on an Oxford scholarship was to escape the psycho-social pressures of colonial society.[2] Akin to the great anticolonial

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[2] Kuan-Hsing Chen and Stuart Hall, "The formation of a diasporic intellectual an interview with Stuart Hall by Kuan-Hsing Chen," in In Davis Morley and Kuan-Hsing Chen, eds., *Stuart Hall: Critical Dialogues in Cultural Studies* (London and New York: Routledge, 1996), 488, 490.

figures such as Ho Chi Minh or Deng Xiaoping in the interwar period, Hall went abroad hoping to transform his country.[3]

Alongside fellow English-speaking Caribbean expatriates Hall reveled in the possibilities of independence. As he reminisced in an interview in the 1990s: "We followed the expulsion of the French from Indochina with a massive celebration dinner. We discovered, for the first time, that we were 'West Indians'. We met African students for the first time. With the emerging postcolonial independence, we dreamt of a Caribbean federation, merging these countries into a larger entity."[4] Unlike most of his peers, however, Hall stayed in Britain and became a "diasporic intellectual," or a "familiar stranger" as theorized by the German sociologist Georg Simmel. Hall became someone who knew England from the inside, but never countenanced becoming truly "English."[5] Hall's conscious refusal to adopt an English national identity was tied with his growing left-wing politics and his cosmopolitanism. His peers at Oxford were independent leftist intellectuals such as Perry Anderson, Charles Taylor, and Raphael Samuel. Most were working-class, Scottish, Irish, or foreign like Hall. They did not fit with the usual Oxford student: male, wealthy, educated at expensive private colleges such as Eton or Harrow, experienced in military drills, and Tory.[6]

Hall's intellectual and political trajectory took a major turn in 1956. That year Britain, France, and Israel invaded Egypt to seize the Suez Canal, while the Soviet Red Army assaulted Hungary to crush Hungarian leader Imre Nagy's attempt to democratize the Communist Party. Hall identified with the Egyptians and the Hungarians whom he saw as victims of imperialism.

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[3] See Michael Goebel, *Anti-Imperial Metropolis: Interwar Paris and the Seeds of Third World Nationalism*. Global and International History (New York, NY: Cambridge University Press, 2015).

[4] Chen and Hall, "The formation of a diasporic intellectual," 494.

[5] *Ibid.*, 492.

[6] *Ibid.*, 495.

Unlike other western intellectuals who responded to the Hungarian crisis by renouncing Marxism, Hall embraced it. In doing so, he was accompanied by students, intellectuals, and activists who comprised the New Left. New Leftists rejected Western Imperialism, Soviet Stalinism, and the stuffy reformism of Social Democratic parties alike. Their anger was not just directed at conservative imperialists in France and Britain who wanted to maintain their empires at all costs by fighting blood counterinsurgent struggles in Malaysia and Vietnam, Kenya or Algeria. They were also angry at Old Leftists from the French Communist Party (Parti Communiste Français, PCF), which abandoned its earlier anti-imperialism to support the maintenance of the French empire in Indochina and North Africa.[7] Moreover, they rejected the British Labour or the West German Social Democrats, whose eager divestment from previous radical impulses struck New Leftists as stuffy reformism.[8]

Hall's conscious embrace of a critical Marxism led to a series of collaborative intellectual and activist projects. The most important were the journal *Universities and Left Review* and the Campaign for Nuclear Disarmament (CND). In the *Universities and Left Review* Hall, Taylor, and Samuel broached topics that older Marxists had not considered important at all: popular culture, and the role of new mass media such as television in creating political consensus. In 1960, *Universities and Left Review* merged with another left-wing journal, *The New Reasoner*, to become the influential journal *New Left Review*.[9]

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[7] "The Communists and the Colonized. The French Communist Party left a checkered record on anti-imperialism. An Interview with Selim Nadi," *Jacobin Magazine*, 29 October 2016.

[8] Terence Renaud, *New Lefts: The Making of a Radical Tradition* (Princeton, N.J.: Princeton University Press, 2021), 206–7.

[9] Kuan-Hsing Chen and Stuart Hall, "The formation of a diasporic intellectual," In Morley and Chen, eds., *Stuart Hall*, 500.

In 1964, Hall joined the Birmingham Centre for Contemporary Cultural Studies (CCCS) as a Research Fellow. Founded that same year by Richard Hoggart, Professor of English at the University of Birmingham, the original goal of the CCCS was to move cultural studies beyond traditional highbrow approaches to culture. Until the 1960s, the dominant form of cultural criticism belonged to scholars such as F.R. Leavis whose intellectual project was to distinguish between high culture in the form of canonical texts of great writers such as William Shakespeare or Leon Tolstoy, from "inferior" forms of literature or novel cultural forms such as television or popular music.[10] Hoggart's major work *The Uses of Literacy: Aspects of Working-Class Life* (1957) had fundamentally challenged Leavis' elitist approach.[11]

Impressed by Hall's contributions to *Universities and Left Review* and *New Left Review* Hoggart invited him to join. Hoggart's tenure lasted five years. His dual role as Professor of English and corresponding administrative roles at the university, proved incompatible with the restlessness of CCCS students who fully embraced the revolutionary energies of the year 1968.[12] In that year, university students across the world went on the streets against a variety of issues ranging from the Vietnam War, domestic authoritarianism, undemocratic governance at universities, authoritarian professors, gender discrimination, and racism. Hoggart went to work for UNESCO.[13]

Hall, whose sympathies lay clearly with the students, became the new director. He helped impulse the development of working groups who workshopped texts cooperatively to avoid

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[10] David Rowe, "Birmingham Centre for Contemporary Cultural Studies," in Wiley Blackwell Encyclopedia of Social Theory, edited by Bryan S. Turner (Hoboken, NJ: Wiley Blackwell, 2017), 1. F.R. Leavis, *The Great Tradition* (London: Chatto & Windus, 1948).

[11] Rowe, "Birmingham Centre for Contemporary Cultural Studies," 3.

[12] Sparks, "Stuart Hall, Cultural studies and Marxism," 80.

[13] Kuan-Hsing Chen and Stuart Hall, "The formation of a diasporic intellectual," 501.

individualistic assessments that did not reflect the CCCS's collective approach. During Hall's tenure, the CCCS produced high-quality contributions such as *Resistance Through Rituals: Youth Subcultures in Post-War Britain* (1976), *On Ideology* (1978), *Women Take Issue: Aspects of Women's Subordination* (1978), *Policing the Crisis: Mugging, the State, and Law and Order* (1978), *Culture, Media, Language* (1980).[14] As will be explored later in this article, these collaborative works contained many of Hall's original contributions that he developed from his engagement with Althusserian structuralism and increasingly, Gramscian Marxism.

Hall's time as CCCS director was also fraught. Throughout the 1970s, he had to contend with growing enmity by the university and from traditionalists at the department of Sociology towards the critical intellectual approach pioneered at the CCCS. Criticism also came from the left. In a public lecture hosted at the Centre in 1979, the historian E.P. Thompson, author of the influential book *The Making of the English Working Class* (1964), publicly and vitriolically attacked the CCCS' approach as "theoretical terrorism." For E.P. Thompson, cultural criticism prized theory above evidence and historical materialism. The rift between E.P. Thompson and the CCCS once more showed the rift between the "old" left and the 60s New Left.[15] Finally, radical revolutionaries and insurgent feminists within the CCCS attacked Hall as a "father figure." As Connell and Hilton have put it "the CCCS in general and Stuart Hall in particular struggled to reconcile a commitment to the politics of 1968 with the politics of hierarchy and leadership."[16]

A combination of dejection and a feeling that his work at the CCCS was done, Hall departed for the Open University in 1979. It was only six months after Margaret Thatcher's

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[14] Rowe, "Birmingham Centre for Contemporary Cultural Studies," 3.

[15] Kieran Connell and Matthew Hilton, "The Working Practices of Birmingham's Centre for Contemporary Cultural Studies," *Social History* 40, no. 3 (2015): 301.

[16] *Ibid.*, 302-307, cit. on 301.

landslide victory. The 1980s–90s proved to be as intellectually productive as they were politically disappointing. Hall reckoned with Thatcherism and New Labour. His seminal essays "The Great Moving Right Show" and the "The Great Moving Nowhere Show," or his 1988 manual for left-wing strategy *Thatcherism and Politics of Renewal* quickly became common sense amongst left-wing intellectuals and activists.[17] Hall's incise critiques of Thatcher and later Blair, and the style in which he formulated them, can be best understood as a result from his engagement with Louis Althusser's Marxist structuralism, and especially with Antonio Gramsci's unorthodox Marxist approach to social analysis.

II. Wrestling with Marxism: Stuart Hall's engagement with Althusser and Gramsci

His time as contributor and, from 1958–61 as main editor, of the *Universities and Left Review* and later the *New Left Review* was profoundly influential for Hall. During those years he realized that Marxism as practiced at that time was highly reductionist. In a 1958 article, Hall openly criticized the Marxist metaphor of base and superstructure. Marx had separated, artificially in Hall's view, the base, that referred to economic production (workers, bourgeoisie, capitalists, means of production, etc.), and the superstructure that comprised everything else, from family and religion to art and media. Marx claimed that the superstructure was merely ancillary to economic production.[18] What is more, Marx's writings were silent on the phenomena

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[17] Sally Davidson, David Featherstone, Michel Rustin, and Bill Schwartz, "Introduction: Redefining the Political," in Stuart Hall, Sally Davison, David Featherstone, Michael Rustin, Bill Schwarz, eds., *Selected Political Writings: The Great Moving Right Show and Other Essays*. Stuart Hall, Selected Writings (Durham: Duke University Press, 2017), 10.

[18] Stuart Hall, "A sense of classlessness," *Universities and Left Review,* 1(5) (Autumn 1958): 26–32.

that Hall and the New Leftists were most interested in: culture, ideology, language, and the power of symbols. Despite their importance these concepts remained under-theorized.[19]

Moreover, Hall found that his contemporaries did not problematize Marxism's inherent eurocentrism. Marx's analysis of capitalism is based on a Western European model, where it developed from within, as opposed to regions where capitalism was brought from without, embedded in coercive power structures that were political, racial, and cultural. European Marxists made models for social transformation that were billed as universally applicable but ignored heterogenous factors beyond economics.[20] A case in point was the British working class. Hall found that traditional Marxism did not have an accurate picture of actual workers in the 1950s. British workers were not the unskilled and immiserated class that Marx wrote would gain consciousness and overthrow the bourgeoisie. Instead, as beneficiaries from upward mobility, secure jobs, and the welfare state, they tended to see themselves as part of the system, not against it. British workers also privileged their interests over those of other oppressed classes, most prominently migrants from the West Indies. This made their participation in a revolutionary upheaval not only unlikely, but they were also prone to fall prey to the forces of reaction through the power of mass media.[21]

Thus, it bears explanation for why, given the profound limitations that he found in classical Marxism, Hall ended up a Marxist after all. Young radicals like Hall perceived advanced capitalist and state socialist societies as ossified. The tools they found to critique these societies came from their re-reading of Marx's classical writings, and the texts of other Marxist theorists.

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[19] Stuart Hall, "Cultural Studies and its theoretical legacies," 261-2.

[20] *Ibid*., 264.

[21] Davis, Helen. *Understanding Stuart Hall* (London and Thousand Oaks, Calif: SAGE Publications, 2004), 102-103.

Chief amongst them were Vladimir Lenin, Rosa Luxemburg, Antonio Gramsci, Herbert Marcuse and other Frankfurt School thinkers, Jean-Paul Sartre, and Louis Althusser. It was this body of Western Marxist Thought that inspired New Leftists, and not the reductive economism of the Second International version of Marxism from 1889, that had then become the intellectual foundation for Real Existing Socialism in the Communist Bloc after 1945.[22] Western Marxism combined a fundamental challenge to capitalism, state-socialism, and imperialism, with an uncompromising stance against political reformism, and a commitment to revolutionary transformation from the bottom up. It offered a totalizing coherence to historical processes that helped make sense of a seemingly chaotic and disjointed world, and a path forward despite it all.[23]

During his first years at the CCCS, Hall, his colleagues, and students "walked right around the entire circumference of European thought, in order not to be in any simple capitulation to the *zeitgeist*, Marxists." This involved reading German idealist philosophy, especially Hegel, and the critical thought of German sociologist Max Weber.[24] Hall, his colleagues, and his students at the CCCS would eventually take the plunge into Marxism because of two reasons: The 1968 student protests, and the thought of Louis Althusser (b. 1918 – d. 1990).

At first sight, Althusser is an unlikely influence for Stuart Hall. Althusser was a loyal member of the Stalinist French Communist Party. Until 1965, he defended state-socialist orthodoxy from idealist critics such as Georgy Lukacs and the Frankfurt School. His critiques of fellow Western Marxists were made with such vehemence that some scholars have excluded him

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[22] See Renaud, *New Lefts*, and Martin Jay, *The Dialectical Imagination: A History of the Frankfurt School and the Institute of Social Research, 1923-1950*. Weimar and Now 10. (Berkeley: University of California Press, 1996).

[23] See Martin Jay, *Marxism and Totality: The Adventures of a Concept from Lukács to Habermas* (Berkeley: Univ. of Calif. Pr, 1984).

[24] Hall, "Cultural Studies and its theoretical legacies," 265.

from the western Marxist cannon. Martin Jay, however, has made a strong case for his inclusion because Althusser's structuralist approach led to the development of a sophisticated concept of ideology and reworking the Marxist concept of ideology.[25]

Althusser's innovation was to introduce the notion of structuralism to Marxism. In traditional Marxist thought, the conditions for a social transformation lay in the economic alienation of the working class which led to the development of class consciousness and then to a revolutionary overthrow of the ruling class. Therefore, for traditional Marxism the major obstacle for the revolution was the slow development of class consciousness, the strength of false consciousness, and the power of the ruling classes. Althusser's work showed that there was another major obstacle: an anti-revolutionary structure conformed of "ideological state apparatuses" (institutions such as the police, the courts, governments, schools, etc.) guided by a ruling anti-revolutionary ideology (property rights, anti-communism, nationalism, etc.). This structure compelled individuals to conform by hailing, or in Althusser's words: *interpellating*, them as subjects into the system.[26]

We can clearly see Althusser's influence in Hall's 1974 essay "Black Men, White Media." Hall argued that there was a fundamental problem in the way that Black migrants were portrayed in British mass media. Television appearances by people of African descent, Hall claimed, were always encased within the framework of "immigrant problems." They were either portrayed as a burden for a mainstream society conceptualized as inherently white, or as dangerous radicals advocating for black power. Blacks were never allowed to formulate the framework of the discussion. Even an openly racist politician such as Enoch Powell was presented as being the

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[25] Jay, *Marxism and Totality*, 388–91.

[26] Louis Althusser, "Ideology and Ideological State Apparatuses," in *Lenin and Philosophy and Other Essays*, edited by Louis Althusser (New York: Monthly Review Press, 1971), 127-88.

recipient of the black "problem," instead of black Britons being the recipients of Powell's racist vitriol. The answer, according to Hall, lay in the inner structure of mass media: "Broadly speaking, the media exists in a very close, sympathetic relationship to power and established values. They favour a consensus view of any problem: they reflect overwhelmingly middle-class attitudes and experience." Moreover, "the media are defensive about the sacred institutions of society…parliamentary legislation, local government, law and order, the police."[27]

True to Althusserian form, Hall attacked the ideology-forming institution of the media for being a poor representative for the views of Black Britons for three reasons. Black Britons were overwhelmingly skilled and semi-skilled working-class. Secondly, given a pervasive lack of access to education, Black Britons were mostly un-articulate and lacked organized viewpoints. Finally, black people in Britain were most likely to encounter problems in their interactions with said institutions. Hall demanded from British media to become more representative of the ordinary men and women who lived and worked in Britain. "Blacks are not puppets attached by strings to some set of issues defined as "black problems" … they have a right to access when these questions are being discussed.[28]

In the mid-1970s Hall came under the spell of another Marxist thinker, Antonio Gramsci (b. 1891 d. 1937) during the revival of Gramsci studies that followed the 1971 publication of the *Prison Notebooks* by Quintin Hoare and Quentin Nowell-Smith.[29] Hall found in Gramsci an array of theoretical tools that largely displaced his earlier interest in Althusser. Even more than in Althusser- himself very influenced by Gramsci- the Italian Marxist gave a lasting contribution

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[27] Stuart Hall, "Black Men, White Media," [1974] in Gilroy, Paul, and Ruth Wilson Gilmore, eds. *Stuart Hall: Selected Writings On Race and Difference* (Durham and London: Duke University Press, 2021), 52-53.

[28] Ibid., 53.

[29] Joseph A. Buttigieg, "Gramsci in English," *International Gramsci Journal*, 3(1), (2018): 26-40.

to cultural studies with his non-reductive approach to Marxism, and his insistence on the role of organic intellectuals.

As with Althusser, Hall's infatuation with Antonio Gramsci requires explanation. Gramsci's main body of work, the *Prison Notebooks*, emerged under the immense duress of his confinement under Benito Mussolini's fascist regime from 1928 to 1935. Gramsci's writings are scattered and fragmentary. He wrote in roundabout ways to side-skirt fascist censorship. Moreover, Gramsci's analytical insights were always grounded in the time and context of early twentieth century Italy, which required, in Hall's words, "considerable care and patience ... to be delicately dis-interred from their concrete and specific historical embeddedness and transplanted to new soil."[30] Finally, Gramsci remained thoroughly centered on Italian politics and society, which prompted the Marxist intellectual Perry Anderson, Hall's erstwhile collaborator at New Left Review, to question his use for postcolonial studies because he was a Western Marxist who had little value for understanding the problems of the Global South.[31]

Hall rejected dismissals of Gramsci of this kind as an error of literalism, which overlooked the very valuable contributions of Gramscian thought beyond their Italian context. Hall became interested in the Sardinia-born Gramsci precisely because he came from the periphery of the Italian nation, just as Hall came from the periphery of the British Empire. Gramsci's Sardinian background made him especially attentive to "the crosscutting relations of regional, cultural, and national difference," and to the asymmetrical speed of development between northern and southern Italy, and between the mainland and the island of Sardinia. Even as he rose to head of the Italian Communist Party in 1924, after years of propelling the organized

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[30] Hall, "Gramsci's Relevance for the study of race and ethnicity," 413.

[31] Ibid., 416.

labor movement in the city of Turin, Gramsci never lost his keen awareness of difference and diversity.[32]

Hall appreciated Gramsci's analysis of Italian society because it disavowed the reductionist economism from the Second International, which had become orthodoxy in the Soviet Union with Nikolai Bukharin's *Theory of Historical Materialism: A Manual of Popular Sociology* (1921). Under this reductive economism, the economic "base" determined the cultural "superstructure" in an unilinear fashion. Thus, the goal of the "superstructure" is always to justify the operations of the economic "base" that comprises the means and relations of capitalist production. The "superstructure" is thus reduced to a tool of the economic elites to buttress their own power. According to this model, laborers who did not show solidarity with other workers suffered from "false consciousness" derived from capitalist culture. The concepts of "base and superstructure" advanced by the Second International and Bukharin were shorn of Marx's original complexity, such as the role of the dialectic in the making of the superstructure, to favor a more easily actionable strategy of revolution. Gramsci rebuffed this reductionist understanding of culture with his original concept of "hegemony." Gramscian hegemony proved eminently influential for Hall and many other scholars as it opened the space for culture, human subjectivity, and contingency in the making of history.[33]

Gramsci understood that classes, for example the working class or the bourgeois class, were riven by conflicting interests, e.g. workers are divided by questions of nation and race;

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[32] Ibid., 416-17.

[33] Ibid., 420–21. On Marx's original definition see Karl Marx, "Preface" in *A Contribution to the Critique of Political Economy.* With some notes by R. Rojas. (Moscow Progress Publishers, 1977 [1859]) https://www.marxists.org/archive/marx/works/1859/critique-pol-economy/preface.htm. Antonio Gramsci, "Critical Notes on an Attempt at Popular Sociology," in Selections from The Prison Notebooks. Edited and translated by Quentin Hoare and Geoffrey Nowell Smith (Lawrence & Wishart London 1971), 769–777.

capitalists are divided by competition and the search for monopoly. Therefore, class unity was something that had to be created. This happened in three main stages. First, there was an 'economic corporate" stage, in which workers, professionals, or industrialists recognized that they had basic common interests, but did not yet develop ties of solidarity. The second stage, the 'class corporate' stage is when these actors started to develop solidarity ties, which were limited to the economic field. Finally, came the "hegemonic" stage, during which economic solidarity would broaden into a political alliance, followed by an intellectual and moral ideology that cemented this alliance, making it "organic," and facilitating others to buy into it. This level of unity gave that social group a tremendous amount of power because it could dictate the framework in which culture develops. Because of historical developments, the bourgeois class had become the hegemonic class, and capitalism the hegemonic ideology since the early 19th century.[34]

For Gramsci, the concept of hegemony explained why many Italian workers supported the capitalist class, were swayed by the Catholic Church, and voted for nationalist political parties, even though all worked against working class interests. The hegemonic process, however, could not be interpreted as absolute. Hegemony was achieved when the "common sense" of the times reflected hegemonic ideology. The mastery of the hegemonic class was founded on popular consent, on the widespread purchase of its ideology, not on authoritarianism or naked force. The key to the strength of hegemony was the strength of a civil society that accepted it. This was the key to its success, but it was also the path to overturn it. Gramsci believed that the violent transformation occurring in the Soviet Union under Josef Stalin was unpracticable in western Europe because of its strong civil society and institutions. If left-wing ideas became hegemonic, Gramsci argued, then the revolution could be achieved in a more peaceful and lasting way. The

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[34] Hall, "Gramsci's Relevance," 423-24.

path to left-wing hegemony is rocky in Gramscian analysis. He argued that there would most likely be no violent revolution, no "Winter Palace moment," in western European countries. Instead, creating left-wing hegemony required slow, persistent work by dedicated "organic intellectuals" that would wage a non-violent "war of position" against right-wing hegemony.[35]

Besides the concept of hegemony, Gramsci's idea of the organic intellectual proved enormously influential for Stuart Hall. Gramsci differentiated between traditional intellectuals who remained wedded to objectivity and stayed put in their ivory towers, and organic intellectuals who emerged from a particular class and articulated their concerns through their scholarship and public activism. Hall, a black intellectual from Jamaica who had made the former colonial metropole his home, saw himself as a public intellectual of the immigrant community, and within it, black workers. This was precisely what he understood his work at the CCCS to be. In Hall's own words, "there is no doubt in my mind that we were trying to find an institutional practice in cultural studies that might produce an organic intellectual."[36] Yet, he found himself in a quandary. The University of Birmingham was an ivory tower, a place unreachable to the class that Hall advocated for. According to Gramsci, "the organic intellectual cannot absolve himself or herself from the responsibility of transmitting [their] ideas, [their] knowledge, through the intellectual function, to those who do not belong, professionally, in the intellectual class."[37] It was this engagement with Gramsci which prompted him to opt for teaching at the Open University from 1979 onwards.

Founded in 1969, with the support of the Labour Prime Minister Harold Wilson, the Open University was made available to all people interested in learning for a small fraction of

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[35] Hall, "Gramsci's Relevance," 428.

[36] Hall, "Cultural Studies and its theoretical legacies," 266.

[37] Hall, "Cultural Studies and its theoretical legacies," 267.

the cost of established universities. The Open University was conceived as the opposite of an ivory tower, a university open to non-academics interested in broadening their perspectives. In an interview Hall recalled that he saw the "more open, interdisciplinary, unconventional setting [of the Open University]" as the best place to bring the high-flying ideas developed at the CCCS down to earth, "to those who don't have any academic background." This was the very idea of an organic intellectual. As Hall puts it: "If you are going to make cultural studies [popular], you have to translate the ideas, be willing to write at *that* more popular and accessible level. I wanted cultural studies to be open to that sort of challenge" (Italics in the original).[38]

III. The organic intellectual in action: Reckoning with Thatcherism and New Labour, 1980s-1990s.

On Friday, 4 May 1979, the new British Prime Minister Margaret Thatcher celebrated her party's landslide victory over Labour. She did it in typical Thatcherite fashion, pontificating against her political foes in a hectoring voice and patronizing tone. She also read from the Catholic Saint Francis of Assisi to the cameras installed in front of her new residence at 10 Downing Street: "Where there is discord, may we bring harmony. Where there is error, may we bring truth. Where there is doubt, may we bring faith. And where there is despair, may we bring hope."[39]

Her victory came on the coattails of the "Winter of Discontent" of 1978-79 in which Labor Unions clashed with the government leading many to think of Britain as "ungovernable." The 1970s had witnessed a further deterioration of the economic situation engendered by Britain's relatively weak economic development since 1945, the oil shocks of the 1970s, and the

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[38] Chen and Hall, "Interview with Stuart Hall: The Formation of a Diasporic Intellectual," 503.

[39] Cited Andy McSmith, *No Such Thing as Society: A History of Britain in the 1980s* (London: Constable, 2011), 11.

growing gulf between the interests of unionized workers and their employers. The conservative Prime Minister Edward Heath (1970-1974) and his Labour Party counterparts Harold Wilson (1964-70, 1974-76) and James Callaghan (1976-1979) had all failed to resolve the crisis. Thatcher promised a radically different approach.

Over the next ten years, British people would soon get used to Thatcher's messianic vision, brought to them in simple terms most could understand. For Thatcher, the welfare state that the social-democratic Labour Party had established since 1945, and which conservatives had upheld, was the original error. This error had been responsible for the discord, doubt, and despair that afflicted the country in the 1970s. Thatcher and the Conservative Party promised to bring back truth, faith, and hope, and especially harmony to a supposedly afflicted nation. Her message was simple. Collectivism had brought decline to Britain; free market capitalism would solve the nation's problems.[40] Her bombastic style led many to underestimate her. For example, the well-known Labour politician, now ex-Minister Tony Benn, believed that his time in the opposition would be short, and therefore he planned to "enjoy" it and "take full advantage of it," just as one would a vacation.[41] The Labour Party would not gain power again almost twenty years later, and then it would hold views wholly unacceptable to Benn.

Stuart Hall quickly grasped that *Thatcherism*, a term he coined himself, was a very different phenomenon from the conservative movements that had come and gone in the years prior. Whereas Benn dismissed Thatcher as a temporary episode, Hall saw the making of an authoritarian populism that was gaining ground with the main constituents of the Labour Party. Thatcher's message was popular because, in perfect populist fashion, Thatcher smoothed over

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[40] Hall, "The Great Moving Right Show," in Hall, et.al., *Selected Political Writings,* 180. More generally see Ben Jackson and Robert Saunders, eds. *Making Thatcher's Britain* (Cambridge: Cambridge University Press, 2012).

[41] McSmith, *No Such Thing as Society*, 12.

economic disparities and class conflicts with a narrative of self-empowerment.[42] Hall understood Thatcher in Gramscian terms. He saw in her ideology and her electoral success the making of a new right-wing hegemony. This put Hall at odds with the wider British left, which largely stuck to Benn's dismissive attitude.[43]

It is easy to see why much of the left was hostile to Hall's analysis. Whereas they saw the achievements of the past forty years as a good to be defended, Hall offered a healthy dose of self-criticism. In his seminal article, "The Great Moving Right Show," published in the journal *Marxism Today,* Hall argued that the growing success of Thatcherism was due to contradictions intrinsic to the social democratic consensus. According to Hall, the Labour Party and Keynesian conservatives had created an image of the state as the benefactor of the people through the creation of the welfare state. This welfare state, however, was "increasingly encountered and experienced by ordinary working people as, indeed, not a beneficiary but a powerful, bureaucratic imposition."[44]

Thatcher was able to point to the long lines to receive unemployment payments, or the long waits at the National Health Service as the failure of this interventionist welfare state. Hall understood that Thatcher's genius was to present herself on the side of the people, as the solution, and conversely, to present the Labour Party as the quintessential political insider, as the government and against the people.[45] In another influential article, Hall added that "neo-Keynesian demands of management, corporatist politics and the disciplining of working-class demands through incomes policy – is deeply discredited."[46] In another, he called the state

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[42] Hall, "The Great Moving Right Show," 185.

[43] Davis, *Understanding Stuart Hall*, 134-38.

[44] Hall, "The Great Moving Right Show," in Hall, et.al., *Selected Political Writings,* 180.

[45] *Ibid*., 181.

[46] Hall, "The Little Caesars of Social Democracy," in Hall, et.al., *Selected Political Writings,* 189.

"socialism's old caretaker," and argued for a rethinking of socialism that went beyond reliance on the state.[47] Hall presciently intimated that the social democratic consensus had crumbled because of its internal contradictions, and that Thatcher's success was rooted in her ability to present herself as the only solution. Whereas the left sought to oppose all things Thatcher, Hall argued that they better learn something from her.[48]

Another side of Thatcher's "war of position" against the social democratic consensus, which Hall recognized, was its insistence on lambasting prior government for allegedly failing to secure law and order, and for allowing too many immigrants to Great Britain. Thatcherism thrived on the "moral panic" of inner-city mugging and violence that had characterized conservative rhetoric throughout the 1970s. The mediatic and social responses to the deviant act of petty theft by impoverished black men had been the subject of a major work dating from Hall's days at the CCCS, *Policing the Crisis* (1978). In it, Hall et.al. had argued that the intense scrutiny given to these deviant acts, did not aim at combatting the social roots of petty theft, for instance unemployment and lack of educational access. Instead, the mediatic response had helped nurture a common sense that favored a harsh police crackdown.[49] In other words, Hall charged social democratic Britain with having excluded black workers, which had then helped facilitate the conditions that Thatcherism capitalized on for garnering working class support.[50]

Throughout the 1980s, Hall urged the left to understand the phenomenon of Thatcherism for what it was, often without success. Even after landslide defeats in 1983 and 1987, the Labour leadership and the trade unions failed to comprehend how dire a state they

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[47] Hall, "The State: Socialism's Old Caretaker," in Hall, et.al., *Selected Political Writings,* 237.

[48] On this account Hall is at odds with David Harvey's influential account of the rise of neoliberalism. See David Harvey, *A Brief History of Neoliberalism* (Oxford and New York: Oxford University Press, 2005).

[49] Davis, *Understanding Stuart Hall*, 106–7.

[50] *Ibid.*, 122-23.

found themselves in. By now, Thatcherism had achieved hegemony, and would "continue to set the terms, define the parameters, establish the benchmark of 'political reality'" in Britain. Hall pointed to the key years of 1975–79 as the time when politics as usual had been destroyed. Instead of Labour's bungling efforts to master the crisis, "she [Thatcher] engineered the fatal coupling of the anti-Labourist, anti-statist, anti-equality, anti- welfare spirit with the revitalised gospel of the free market." An alternative social philosophy had been born: "Thatcherism," combining "organic national patriotism, religion of the free market, competitive individualism in economic matters, authoritarian state in social and political affairs."[51]

Hall charged that instead of taking Gramsci seriously and combining forces to create a new hegemony, the Labour chief, Michael Kinnock, and trade union leaders such as Arthur Scargill remained stuck in the good ol' boys' politics of traditional trade unionism. They failed to recognize the importance of broadening the struggle to include new social movements such as feminism.[52] Indeed, the collusion of Labour politicians with the right-wing campaign against the 'loony left', and Kinnock's "manly, 'likely lad'" image, "carried no echo or trace of feminist struggles over two decades."[53]

In an assessment that rings true even today, considering the catastrophic performance by Labour leader Jeremy Corbyn in the 2019 general elections, Hall explained that the party's conservative campaign promises: to bring back the welfare state, to strengthen the working class, and to restore state ownership of key industries; were not sufficiently popular to bring majorities. Too many people had never belonged to the traditional working class, and not all workers were Labour supporters. To defeat the conservatives, Labour needed to present itself as

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[51] Hall, "The Crisis of Labourism," in Hall, et.al., *Selected Political Writings,* 210.

[52] *Ibid*., 209.

[53] Hall, "Blue election, election blues," in Hall, et.al., *Selected Political Writings,* 243.

a viable alternative, but it "cannot build such an alternative by, however honourably, replaying '1945' in 1987." It needed to move forward with a strategy "for modernisation and an image of modernity."[54]

In the 1990s, the Labour found a strategy for modernization, but it would be far from the modernization that Hall had called for. Spearheaded by the young politicians Tony Blair and Gordon Brown, the Labour party underwent a radical transformation after 1987, shedding its commitment to trade unionism, state ownership of the means of production, and even the welfare state. Blair's political goals were masterfully ambiguous: to "build a strong society which gives each citizen the potential to develop to the full." The Labour Party that won the elections in 1997 with Blair as Prime Minister even called itself "New Labour."[55]

Hall was intensely critical of New Labour's political ideology which he saw as updating, but never challenging, neoliberal common sense. The undercutting of the welfare state under the label of reform was, for Hall, especially egregious for a party that claimed to be following in the footsteps of the wartime architect of the welfare state, William Beveridge. Hall could not see how New Labour was any different from Thatcherism. Blair's contempt for the "work-shy," his penchant for privatization, and the imposition of these neoliberal views on the Labour faithful, made him less an alternative and more a continuation of Thatcherite policies. In one article Hall wrote with his collaborator Martin Jacques, he called New Labour "Thatcherism with a human face" which earned him the enmity of New Labour's intellectual supporters. Hall was undeterred. Trenchantly, he concluded that New Labour may not be "the

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[54] *Ibid.*, 246–47.

[55] Tony Blair, "Socialism," Fabian Pamphlet 565 (London: Fabian Society, 1994), 7. James E. Cronin, *New Labour's Pasts: The Labour Party and Its Discontents*. 1st ed. Harlow, England and New York: Pearson/Longman, 2004.

populism of Mrs. Thatcher's neoliberal right… but it is a variant species of 'authoritarian populism' none the less – corporate and managerialist in its 'downward' leadership style and its moralising attitude to those to whom good is being done."[56]

Hall went at work to unravel the ideological trappings of New Labour ideology. For instance, one of Blair's favorite quips was that globalization had made it impossible for a government to manage the economy. Change was inevitable, and that all that a government could possibly do was to "manage change." Rather than attempting to cushion Britain's workers from external change, however, New Labour's agenda seemed entirely different: "His response is to 'manage change'. But it seems that what he [Blair] really means is that we must 'manage ourselves to adapt to changes which we cannot otherwise control.'"[57] New Labour was a free-for-all, no holds barred opening of the economy to globalization without care for the long-term consequences.

Conclusion

Hall's engagement with New Labour and the conservative governments that have succeeded it lasted until his death in 2014. He remained engaged in the making of the anti-neoliberal Kilburn Manifesto, which was published posthumously in 2015.[58] Throughout his career, Hall remained an engaged scholar who never wavered in his commitment to bringing his insights to the population at large. This article has analyzed Hall's biography and the emergence of cultural studies from a critical standpoint towards Marxism. The very same intellectual curiosity that led him to reject the reductive lures of Marxist economism led Hall to

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[56] Hall, "The Great Moving Nowhere Show," in Hall, et.al., *Selected Political Writings,* 295–6.

[57] *Ibid.*, 289.

[58] Stuart Hall, Doreen Massey and Michael Rustin, eds., *After Neoliberalism? The Kilburn Manifesto*. A Soundings Collection. (London: Lawrence and Wishart, 2015).

a productive intellectual engagement with critical Marxists Louis Althusser and Antonio

Gramsci. Whereas Althusser opened his eyes to a non-reductive Marxism, Gramsci taught Hall

about the concept of hegemony and the organic intellectual, naming an individual which Hall

could recognize himself in. Better than most, Hall understood that value of structural thinking,

ideology, and hegemony to understand British society. Better than most, Hall was able to

translate his difficult theories into a language that most people could understand. For these

reasons alone, Hall's scholarship remains a sure guide to present global challenges that

deserves a wide readership.