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EXPLORING CONNECTIONS IN ENGLISH APPLIED LINGUISTICS

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DEAL 2025: Exploring Connections in English Applied Linguistics

Edited by

Nóra Wünsch-Nagy & Ádám Lajtai

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Editors' Foreword

We are honoured to present the 2025 volume of peer-reviewed studies in applied linguistics as the fifth publication in the series published by the Department of English Applied Linguistics, Eötvös Loránd University. We see this initiative as part of the legacy of our late Head of Department, Enikő Öveges, who proposed the creation of the volume in 2019. This fifth volume is the result of a two-year project and we believe that it is essential to keep this tradition alive as it creates an opportunity to share our research from a variety of authors including PhD students and members of the department of a wide range of expertise and experiences. Just like DEAL, our department, the studies presented in this volume are diverse and inspiring. The chapters presented here range from theoretical considerations through language policy in bilingual education, teacher motivation in connection with digital technology and emotions, assessment, AI use, multimodal text analysis for intercultural learning, and translation studies. For this reason, the title of the volume is Exploring Connections in English Applied Linguistics. We find that all of the studies address real world problems through scholarly lenses and offer theoretical and methodological solutions to make applied linguistics matter in our world.

As the starting point for this volume, Éva Illés highlights the key role theory plays in scientific inquiry and language pedagogy. Her study shows us why theoretical knowledge and thinking need to become part of the language teachers' toolkit.

In the second chapter, we move from theory to language policy, and Ádám Lajtai explores the status of English bilingual secondary education in Hungary, both in the capital and the countryside. With findings highlighting the vast disparities between bilingual schools across the country, his paper argues that policy intervention is essential in terms of teacher training and equitable admissions to address issues of inequality and promote social mobility.

The third chapter written by Mai Nelly Kaw investigates the attitudes of English major teacher trainers towards technology integration in the teacher training programme and explores how they apply technology in teaching.

In chapter four, Christian Andrade-Molina and Estefanía Belduma explore how university instructors perceive their roles in motivating non-English major students to learn English in Ecuador. Their findings reveal that while learners often idealize native speakers and show limited intrinsic motivation, teachers' empathy, humor, and local language-learning experiences serve as strong motivational forces. The study highlights the importance of the interpersonal dimension of teaching in fostering positive learner engagement.

The fifth chapter by Estefanía Belduma explores the emotional experiences of Ecuadorian EFL teachers focusing on the emotions they choose to express or conceal and how these emotions influence how they teach. The study underlines the necessity of incorporating emotional awareness and regulation into language teacher training programs. Their study highlights the need to integrate the interpersonal dimension of teaching.

The sixth chapter turns to assessment in English for Academic Purposes (EAP), where Gyula Tankó and Dung Hoang Duc evaluate the retrofitting process of an analytic rating scale used in a criterion-referenced EAP assessment. Their study reveals issues of practicality and consequential validity, leading to a refined scale with improved applicability. The findings underscore the importance of aligning assessment tools with changing educational contexts and resources.

In chapter seven, Attila Wind compares AI-generated and human-produced argumentative essays to investigate linguistic complexity and cohesion. The results show that ChatGPT-generated texts display greater lexical diversity and academic features, though human essays remain more variable in cohesion. The chapter concludes with reflections on the applicability of AI in the teaching of academic writing.

In chapter eight, Nóra Wünsch-Nagy and Mónika Fodor explore how multimodal literature can contribute to developing students' intercultural learning. Through the presentation of the use of pedagogic metalanguage to engage with two graphic novels in the classroom, they show how multimodal pedagogy supports language and intercultural learning.

The two final chapters address issues in translation studies. In chapter nine, László Katona and Luca Anna Fekete analyse the Hungarian and Portuguese dubbed versions of Shrek to explore the translation of English puns in audiovisual contexts. Their findings show that while Portuguese translations adhere more closely to structural equivalence, Hungarian versions demonstrate greater creativity and cultural adaptation, achieving dynamic equivalence through localisation.

Then, Mahmoud S. S. Fannouna investigates how localization shapes the translation of English-language advertisements for Arabic-speaking audiences. The study reveals how culturally sensitive adaptation is essential for communicative effectiveness and commercial success. The paper concludes with recommendations for advertisers and translators seeking to balance linguistic fidelity with cultural resonance.

The penultimate chapter written by Sindy J. Castillo examines how cultural background shapes self-regulated learning among EFL teacher trainees in Ecuador and Hungary. The study reveals culturally influenced differences in planning, autonomy, and time management, with implications for culturally-aware pedagogy.

The book ends with another theoretical exploration, written by Eszter Guba, exploring motivation loss among formerly high-achieving L2 learners through the lens of fragile self-image and the "hitting the wall" phenomenon. The chapter links misinterpreted exceptionalism, perfectionism, and inadequate learning strategies to demotivation in advanced learners.

The editors

Nóra Wünsch-Nagy and Ádám Lajtai

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The Importance of Being Theoretically Earnest

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Abstract

The paper aims to highlight the key role theory plays in all spheres of life, including scientific inquiry in general and language pedagogy in particular. It is argued that since theories are generated to solve particular problems in a particular setting, no theory can claim to be the panacea for all ills. In this study, the changes in the conceptualisation of communicative competence and autonomy provide a case in point. In academic pursuits, it is theoretical research which, by definition, cannot do without theory. However, theory is equally important in empirical research as no investigation can be conducted without a conceptual design or framework. Since all teaching methods and approaches are founded on some kind of theory, it is paramount that practitioners have a sound understanding of the theoretical models and constructs that inform the teaching of languages and, subsequently, their own practice. By engaging in theorising, teachers can counteract the prevailing prescriptiveness of language pedagogy and function as independent thinkers and autonomous decision makers, thus maintaining the well-earned professional status of educators.

Keywords:

theorising, the nature of theory, theory in research, theory in language pedagogy, theory-practice interface

1 Introduction

During the heydays of Communicative Language Teaching (CLT), Widdowson (1984) argued for the importance of teachers' familiarity with the theoretical principles that underlie their CLT practice. Widdowson (1984) claimed that if teaching is to be considered

a true profession, it must necessarily entail "intellectual inquiry and experimentation" (p. 88). Practitioners, therefore, have to function as independent researchers who, rather than accepting researchers' theoretical proposals and empirical findings at face value, should subject such offerings to critical appraisal in order to establish their relevance to a particular classroom context. In addition, if teachers know what they are doing and why they are doing it, they are more likely to make informed decisions and less likely to fall victims to "fads, bandwagons, swings of the pendulum" (p. 86), of which there have been many in English language teaching (ELT). Cook (2009) named a few: "at different times over the last hundred years teachers have been told: don't translate, don't correct errors, don't explain rules, don't contrast languages, don't teach from the front, don't drill, etc." (p. 246).

Widdowson's call for a theoretical orientation to language teaching seems to have remained unheeded over the years as the issue of (re)integrating theory into pedagogy and applied linguistics in general has again been addressed in scholarly papers. Illés (2012) reiterated the need for teachers' understanding of theory as a means of empowering practitioners and helping to bridge the gap between teachers and researchers. McNamara (2015) looked beyond teaching and pressed "for a greater engagement with theory in Applied Linguistics" (p. 466).

English as a lingua franca (ELF) research provided fresh impetus for theoretical investigations. Its initial findings were mainly based on corpus data (e.g., the VOICE project), which led to the conclusion that ELF cannot be conceptualised as a variety (Jenkins, 2012; 2015) but should rather be conceived as a particular type of language use. The global spread of English and the immense diversity of ELF users' linguacultural backgrounds as well as the ensuing dynamism and unboundedness of ELF communication inevitably shifted the analysis of ELF from a linguistic to a pragmatic one. The "unprecedented phenomenon of ELF" (Seidlhofer, 2009, p. 56) then required not only a different approach to the study of ELF but necessitated a theoretical enterprise: the rethinking of established concepts (Widdowson, 2012). The notions whose perception Widdowson (2012) suggested should undergo renewed scrutiny include, among others, communicative competence, performance, creativity, and the native speaker. Jenkins (2015) summed up the relationship between the empirical and the theoretical in ELF research as follows: "theorizing cannot stop for as long as the complex phenomenon of ELF exists and new empirical evidence about its nature continues to emerge" (Jenkins, p. 57).

A severe blow to the efforts to incorporate theory into language pedagogy was dealt by Medgyes (2017), who claimed that scholarly research is, by and large, irrelevant to practitioners. At his most critical, Medgyes refers to applied linguists as "Jack of all trades" but master of none (p. 491) and claims that "it is not the practitioner who is in need of the theorist, but the other way round: for most researchers lassoing the teacher is a matter of life or death" (p. 496). Decades earlier, in a similar but less crude vein, Hymes (1972) began his seminal paper on communicative competence by stating that the paper

was theoretical (p. 53), and that there were two connotations of theoretical which were prevalent at the time: "One connotation of 'theoretical' is 'programmatic'; a related connotation is that one knows too little about the subject to say something practical" (p. 53). In disagreement with the negative perceptions, Hymes (1972) claimed that "practical work, however, must have an eye on the current state of theory" (p. 53).

Similarly to Hymes (1972), this paper does not align with either of the above negative connotations and strongly disagrees with Medgyes' view of the role of research in classroom practice. Instead, it aims to present arguments for the importance of being theoretically earnest for both teachers and researchers. First, the nature of theory in the context of applied linguistics and language teaching is clarified, followed by the key role theory plays in research, and in empirical research in particular. Finally, but equally importantly, the fundamental role of theory for language educators is discussed.

2 Theory, Theories, and Theorising

Theory and thinking in abstraction are an integral part of everyday life. Naming a four-legged creature as a dog or a cat, for example, involves relating the particular animal to the abstract pattern, in other words schema, that a person develops through repeated experience and exposure to various events, objects, and people in their lives. In other words, "we make sense ... of a particular phenomenon by going beyond the actual appearance and identifying it as an abstract instance of some more general category" (Widdowson, 2009, p. 241). Consequently, no understanding of or learning about the world takes place without connecting new information to something familiar (Widdowson, 2003; 2012), to something already abstracted from relevant experiences. This being the case, learning a second or additional languages does not occur in a vacuum, as the acquisition of a new language always entails relating new knowledge to the knowledge of languages a learner/user already possesses (Widdowson, 2003). Interestingly, but understandably, people's theories can relate to an infinite number of everyday occurrences, as illustrated by one of the sample sentences of the *theory* entry in The Online Oxford Collocation Dictionary: "He has a theory about why dogs walk round in circles before going to sleep"[1]. It is therefore safe to say that while trudging through life, humans do not and cannot cease theorising.

As in everyday life, scientific theories are formulated in order to solve problems emerging and identified in particular circumstances. This limitedness then necessarily imposes constraints on the theory itself but also gives rise to further development or modification of the original theory. The changing conceptualisation of communicative competence is a prime example. Chomsky (1965) made the distinction between competence and performance. In his scheme, competence comprises the ideal speaker's theoretical knowledge of the formal properties of language, while performance is competence being actualised in specific acts of communication, affected by a

1 See https://www.freecollocation.com/search?word=theory=

number of factors, such as "memory limitations, distractions, shifts of attention and interest, and errors" (p. 3). Given the messy nature of performance, Chomsky knowingly and deliberately restricted his inquiry to the abstract notion of competence. Hymes (1972), who was concerned with real, not ideal speakers, realised that Chomsky's theory, by definition, could not account for "the difference between what one imagines and what one sees" (p. 54), and a theory that included sociocultural factors was needed. Hymes, therefore, broadened the concept of competence and included four features which, according to him, constitute language users' communicative competence (CC). The four CC components by which speakers interpret and judge their own and their interlocutors' language use are the (formally) possible, feasible, appropriate, and actually performed. Whereas Hymes' (1972) context in focus was language use by a "normal member of a community" (p. 63), the notion of CC put forward by Canale (1983) was concerned with the learning context, as the title of the paper in which it was published also indicates: *From Communicative Competence to Communicative Language Pedagogy*. The shift in the context of inquiry necessarily gave rise to differences in the features that, according to Canale, make up a language learner's communicative competence. The four components in Canale's CC are as follows: grammatical, sociolinguistic, discourse, and strategic competence. One of the amendments made by Canale is the sociolinguistic component in his scheme, which roughly corresponds to Hymes' appropriateness (Widdowson, 2003), while the formally possible constituent of Hymes' CC was replaced by grammatical competence in Canale's definition of CC. The seemingly minor change in the terminology aptly highlights the marked difference between language use and language learning. Canale's (1983) notion of grammatical competence comprises rules, usually of Standard English, that learners need to acquire in order to produce correct language. An important point about rules is that they are social constructs, as decisions regarding what is correct or incorrect are "not linguistically but socially based" (Thomas et al., 2004, p. 181). The reason for this is the very choice of a standard variety :

> Thus it is not just that a variety is chosen as the model for the standard because it is associated with a prestigious social identity, but that it also enhances the powerful position of those who speak it, while diminishing all other varieties, their speakers, and any possible competing norms. (Wardhaugh & Fuller, 2015, p. 35)

On the other hand, Hymes' notion of the formally possible makes no reference to rules but rather to the kind of knowledge and/or intuition that enables speakers to use the language creatively and come up with novel forms that serve their communicative purposes best in particular acts of communication. One such example is the brand name iPhone, which blatantly disregards the rules of capitalisation. The relationship between context CC is further illustrated in Bachman's (1990) testing-oriented 14-component model of CC.

What all the above conceptualisations of CC have in common is that they were invoked by the need to solve a particular problem in a particular situation. As a result, like all theoretical models,

> [t]hey are always relative, partial accounts, limited by the perspective taken by the theorist or the researcher. … You don't accept, therefore, or reject them as the truth, the whole truth and nothing but the truth, no matter how impressive the reputation of the theorist or the researcher. (Widdowson, 2009, p. 243)

The concept of learner autonomy is another point in case. Holec's (1981) definition, "the ability to take charge of one's own learning" (p. 3), was conceived in the context of the establishment of a self-access resource centre in Nancy, France, for adults who wanted to learn foreign languages on their own, without the assistance of teachers. In order to be successful, the learners had to be able to control the whole learning process. Holec's conceptualisation thus reflected the requirements for language development in formal instruction. With the global spread of English and its use as a lingua franca, the learning and use of the language have moved beyond the confines of the classroom, and the perception of learner autonomy has to reflect that. The new definitions (Illés, 2012; Sockett & Toffoli, 2012), therefore, have broadened the scope of the notion and include "the ability to manage and control language use" and "the capacity to become competent speakers of the target language who are able to exploit the linguistic and other resources at their disposal effectively and creatively" (Illés, 2012, p. 509).

3 Theory and Empiricism

As seen above in the case of ELF, the need for the reappraisal of established concepts (Widdowson, 2012) has arisen from the initial empirical research, whose findings have highlighted the need for an alternative approach to the conceptualisation of ELF. Whereas in ELF the empirical investigation triggered theoretical considerations, in hard sciences, it is often the other way round, with empirical studies preceded by theoretical calculations, as illustrated by the example of the Higgs boson. In 1964, Peter Higgs hypothesised the existence of a particle which gives other particles their mass. The empirical proof became available only after the construction of the necessary equipment, the Large Hadron Collider, where the Higgs boson was discovered many years later, in 2012.

4 The Role of Theory in Research

Theoretical research, by definition, cannot do without theory, as it is impossible to create a novel theoretical model or framework, the expected outcome of this type of study, without having a clear understanding of the relevant contributing theories. The role of

theory in empirical research is no less important. One reason for this is that whether it is quantitative, qualitative, or mixed-methods, empirical research cannot be conducted without theoretical grounding. In simple terms, it is difficult to find the pertinent data if the researcher does not know what exactly comprises their object of inquiry. If the study is concerned with idioms, for instance, the researcher must have a very precise idea of what constitutes an idiom and how it is different from other notions, such as an expression, collocation, or proverb. Moreover, regardless of the type of research, the research questions posed or the hypotheses to be confirmed or refuted are necessarily abstractions which result from the researcher's perspective, at a remove from the phenomenon under scrutiny. It should, however, be noted that theory relates to quantitative and qualitative study differently. Since one of the main characteristics of quantitative research is "a priori categorization" (Dörnyei, 2007, p. 33) based on clear definitions and descriptors, the connection between theory and quantitative study is much more straightforward than in the case of qualitative research, where the outcome of data analysis is the emergent new theory. For the data to speak for itself, ideally, the qualitative researcher should proceed "without any biased interference" (Dörnyei, 2007, p. 39). However, as Dörnyei (2007) points out, the assumption of a clean slate is not only naïve but impossible as well, as scientific research cannot be carried out without any conceptual design or framework.

In his overview of qualitative data analysis, Dörnyei (2007) defines theory as follows:

> The main point about 'theory' is that researchers should go beyond merely describing or categorizing the target phenomenon and should offer some basic understanding of the principles, relationships, causes and/or motives underlying it. (p. 260)

Interestingly, Widdowson (2012) makes a similar point concerning ELF research, but his observation stands valid for all kinds of data, be they theoretical or empirical: "We cannot cope with the **data** of experience until we have converted them into conceptual **evidence**. In this sense, paradoxical though this may seem, we can only make things real by making them abstract …" (p. 16, emphasis in original).

Research, very much like ELT, has not been unaffected by fads. For example, there seem to be more frequently evoked and more influential theoretical models than others in the realm of motivational research. Gardner's (1979) socio-educational model, which originated in the bilingual French-English Canadian context, is one of them (Henry, 2019). Gardner's distinction between instrumentality and integrativeness provided an apt framework for the investigation of learners' motivation in an environment where there are communities with speakers of both target languages. Henry (2019), however, argues that the model is less pertinent in settings where the target language is learnt in formal instruction. Consequently, Henry, in agreement with other researchers participating in a Swedish project focusing on teachers' motivational practice in the classroom, decided to adopt theories that were judged more suitable for the purposes of their undertaking. When outlining the theoretical foundation of the project, Henry (2019) opted out of another dominant theory, Dörnyei's L2 Motivational Self System (L2MSS). The reasons

given for this decision include the fact that the main concern of the Swedish project was the classroom reality of English language teaching in the country. Through classroom observations and subsequent interviews, researchers aimed to explore how motivation emerged during the interaction between teachers and learners while engaging in well-selected relevant tasks and activities. For the purposes of their classroom-centred and Sweden-specific investigation, other constructs, such as flow, willingness to communicate, and engagement were deemed to be more suitable (Henry, 2019).

A quick search in Google Scholar illustrates how renowned Dörnyei's L2MSS is among researchers: as of 16 January 2025, the search returned 124,000 hits for publications that mention the L2MSS, including Dörnyei's original articles[2]. The cited publications originated in teaching contexts worldwide, which raises the question of how it is possible for a theory to pertain to such a wide range of often very diverse settings. Interestingly, it was Dörnyei himself who continued to evolve his theoretical exploration and, exploiting the potential of the L2MSS and other theories, put forward a novel motivational construct with Muir: the model of Directed Motivational Currents (Muir & Dörnyei, 2013).

Most probably, it is not only the Swedish English language teaching context where the L2MSS model or its particular components might prove, by and large, irrelevant. Those who have or have had actual classroom experience know that any query about students' motivation, or other issues for that matter, must be rooted in the learners' immediate reality. This reality is usually about coping with the English lesson, just one among several classes on a particular day, trying to do well on tests, tasks, and in class discussions, guessing teachers' expectations, or simply surviving the lesson when there was no time to prepare for it due to a variety of mundane reasons. In a deprived area of a country, managing a school day is even more difficult because of the inevitable hardships of everyday life. Teachers can obviously make the classroom a pleasant and successful learning environment, but the many issues that may emerge day in and day out do not and cannot be addressed in mission statements or methodology courses in teacher education programmes. Therefore, asking, for example, primary Grade 5 children to visualise their ideal self and describe how they see themselves as English speakers in the future may not produce the desired results for a motivational study.

Findings of research provide supporting evidence for such observation. Lamb (2012), who investigated junior high school students' motivation to learn English in metropolitan, urban, and rural areas in Indonesia, found that the ideal self exerted the most influence on pupils' motivation in metropolitan areas. Lamb (2012) attributed this to the students' age (13-14 years) as well as the fact that in provincial and rural contexts, "the efforts that pupils put into the learning of English is more susceptible to immediate contextual factors than to their visions of a future self" (pp. 1014-1015). Based on the review of other studies, Csizér (2019) concluded that the contribution of L2 selves to language learning motivation is dependent on a variety of contextual features.

2 See http://scholar.google.com/scholar?hl=hu&as_sdt=0%2C5&q=L2+motivational+self+system+&btnG=

5 Theory in Pedagogy

Even though all teaching methods and approaches are founded on some theories of language, language use, and learning (Cook, 2009), publications aiming to provide general guidance and practical ideas for teachers only cautiously dare to venture into the realm of theory. Communicative Language Teaching is an interesting case in point. Of the relevant studies, Richards and Rodgers' (2001) book and *Techniques and principles in language teaching* by Larsen-Freeman (2000) are among those which provide comprehensive overviews of various language teaching methods and approaches together with the theories or principles that have informed them. The express aim of these publications is to enable teachers to make informed rather than "conditioned" (Larsen-Freeman, 2000, p. ix) choices by giving them "a set of criteria by which to critically read, observe, analyze, and question approaches and methods" (Richard & Rodgers, 2001, p. ix). This intention undoubtedly remains laudable even today, as the "evangelical fervour with which each of these has been advocated in their time, and the extreme positions which some have adopted" (Cook, 2009, p. 246) has its traces in contemporary ELT as well.

Since the main concern of CLT is communication, Hymes' (1972) communicative competence and Widdowson's (1978) theoretical CLT framework feature in both volumes (Larsen-Freeman, 2000; Richards & Rodgers, 2001). However, apart from a brief mention or summary, neither of the theoretical constructs is further elaborated. In a similar vein, although there is reference to pragmatic notions such as context and contextualization, functions and attention to functional aspects of language, as well as language user's intentions, authenticity, and negotiation of meaning (Larsen-Freeman, 2000; Richards & Rodgers, 2001), what language use—the concern of pragmatics—entails remains unexplained. This lack of relevant details is unfortunate, given that the goal of CLT is conceived in pragmatic terms as the "learner's ability to communicate in the target language" (Celce-Murcia, 2001, p. 8), with focus on the meanings "behind the communicative uses of language" (Richards & Rodgers, 2001, p. 154). It seems that even theoretically oriented ELT publications shy away from naming and expounding pragmatic theories, such as Speech Act Theory (Austin, 1975; Searle, 1965, 1991) which, in fact, constitutes an indispensable part of the theoretical foundation of CLT (Bardovi-Harlig, 1996; Bardovi-Harlig, 2001; Soler & Martínez-Flor, 2008).

One of the often-mentioned features of CLT is its focus on meaning (Richards & Rodgers, 2001). But as Widdowson observes (1998), language teaching trends before CLT were also concerned with meaning. What distinguishes them from CLT is the fact that while language teaching movements preceding CLT promote semantic meaning (i.e., the conventional, out-of-context meaning, as found in a dictionary), CLT aims to engage learners in negotiating pragmatic meaning (i.e., contextual meaning, communicated by language users on a particular occasion). In pragmatics, Speech Act Theory sets out to answer the question of how speakers manage to make hearers understand the intentions behind their verbal actions. Its basic tenet is that in language use, there is always some kind of purpose, be it a request, suggestion, agreement, refusal, etc., which triggers and

informs the use of language. When speech acts were adopted in language pedagogy, they became functions. The integration of Speech Act Theory into CLT was followed by a flurry of research into the differences between native and non-native speaker realisations of various speech acts. The overall aim was to encourage learners to adopt the ways in which native speakers use functions, such as complaints, apologies, and refusals (Soler & Martínez-Flor, 2008), so that they sound and behave like their native speaker counterparts. The norms defining appropriateness have thus been aligned with the norms of—it must be added—idealised native speakers (Illés, 2011; Widdowson, 2012). Interestingly, when Speech Act Theory was transferred into language pedagogy, the descriptive pragmatic theory transformed into a highly prescriptive set of "idealized typifications of what native speakers may say and do in specified contexts" (Leung, 2005, p. 126).

It must be noted that Speech Act Theory is not the only one which has undergone a shift from descriptive to prescriptive upon reaching the realm of language teaching. The Common European Framework of Reference (CEFR, 2001) has fallen victim to similar prescriptivisation (Knechtelsdorfer, 2023), as its original objective was to generate discussion rather than serve as the benchmark for learning objectives in curricula and assessment:

> One thing should be made clear right away. We have NOT set out to tell practitioners what to do, or how to do it. We are raising questions, not answering them. It is not the function of the Common European Framework to lay down the objectives that users should pursue or the methods they should employ. (Council of Europe; Notes for the user)

The prescriptive nature of principles and theoretical constructs then, by definition, discourages the kind of critical engagement Larsen-Freeman (2001) as well as Harmer (2007) in his book on the practice of ELT consider imperative. The latter publication is interesting in that while there is no section for critical comments in the observation sheet for the sample lessons (p. 440), wherever reference is made to a relevant theory, doubts and counterarguments are raised. For example, the outline of the widely—and often uncritically—adopted humanistic approach includes the caveats that not everybody is happy to bear their thoughts and feelings in the language class, as well as the fact that "there is a strong cultural bias to this view of teaching and learning which would be inappropriate in certain situations" (Harmer, 2007, p. 59).

The presence of half-baked theoretical accounts and prescriptivism in language pedagogy is regrettable, as this kind of attitude makes theory, by and large, inaccessible and transforms it into an unchallengeable dictum for teachers who may, therefore, refuse to engage in theorising. Alternatively, practitioners may accept whatever is proposed by researchers (Medgyes, 2017) at face value, without questioning their universal currency. In either case, the deprofessionalisation of educators takes place, where teachers are "consumers of research" rather than being independent and autonomous "researchers in their own right" (Widdowson, 1984, p. 90). The rejection of theory, among other

consequences, renders teaching "skilled labour" (Medgyes, personal communication), where practitioners are trained to perform tasks in a predefined and commonly accepted manner in order to achieve objectives set by outsider authorities functioning in often very different contexts.

In contrast, knowledge of the theories and principles that lie behind various language teaching approaches and methods enables teachers to probe into the validity of the findings and proposals put forward by researchers. Such expertise allows teachers to appraise theories and examine their relevance to their own practice. Familiarity with recent research can, for example, help teachers to avoid compartmentalising their students according to their putative aptitude and learning styles. Lethaby and Harries (2016) point out that despite the lack of scientific evidence, a considerable number of teachers in their survey maintained the neuromyth that "accommodating sensory preference learning styles enhances English learning" (p. 24). Similarly, Mercer (2012) argues that instead of subscribing to an innate and unchangeable talent such as aptitude, teachers should favour a growth mindset and believe in their learners' capacity to develop their language learning skills and abilities.

Just as all humans are different and unique in their own way and right, no class or lesson is ever the same. In other words, "there is no generic classroom; in a sense, all classrooms are different. *Real classrooms*" (Widdowson, 2009, p. 24, emphasis in the original). However, a sound understanding of theoretical models and constructs pertaining to the use and teaching of languages can make it possible for teachers to find order in the messy business that the reality of teaching represents (Medgyes, 2017) by helping teachers to move beyond the immediacy of the classroom and allow them to reflect on it at a remove, "abstracting something general from particulars" (Widdowson, 2009, p. 241). Moreover, a theoretical orientation enables teachers to make informed decisions regarding all, even the minutest aspect, of their practice. In doing so, they are able to establish what works, what does not and, most importantly, why in the classroom (Widdowson, 1984).

6 Conclusion

This paper has intended to argue for the crucial importance of theory in both education and research. First, the nature of theory was examined and the fact that theories represent partial truth pertaining to the solving of a particular problem at a particular time and place has been established. Awareness of the local rather than the universal relevance of theoretical models in research is important, as it influences the choice of theories deemed suitable for the development of the theoretical foundation and scheme of analysis of a study, be it theoretical or empirical. A sound understanding of theory is vital for practitioners as well, for a number of reasons. On a practical level, planning and reflection cannot be done without reference to something more abstract than the immediate reality of the classroom, with all its unpredictability and fortuitousness.

Secondly, teachers need to understand what principles lie behind particular language teaching trends, so that they do not accept pronouncements by authority unconditionally. Teachers should, rather, assess the relevance and suitability of researchers' proposals in relation to the local conditions and requirements of their teaching contexts. Ultimately, it is only teaching as an intellectual inquiry and teachers as independent thinkers that can maintain the professional status of educators—a standing that those involved in education should never surrender.

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2

Bilingual Secondary Education in Hungary: Structural Difficulties, Diverse Student Backgrounds, and Questions of Equality

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Abstract

The growing social importance of English has led to the rapid spread of bilingual schools across Europe and in Hungary. Research across Europe (e.g. Pérez Cañado, 2018; Lorenzo et al., 2020) has shown that bilingual education is potentially a powerful vehicle of mitigating socioeconomic inequalities in education by broadening access to linguistic and cultural capital through language. As similar investigations have been rare in Hungary, the present study aims to explore the structural and social dimensions of English–Hungarian bilingual secondary education in Hungary. Using a qualitative design with three focus group interviews with teachers (N=9) representing schools in Budapest, a large town, and a small town in Hungary, the study investigates challenges in implementation of bilingual education, the diversity of student backgrounds, and the social functions of bilingual education in the different locations. The findings reveal systemic problems, e.g., a shortage of bilingual-qualified teachers, the absence of appropriate teaching materials, and limited institutional support, which all hinder the smooth implementation of bilingual programmes. Teachers' accounts also highlight marked regional disparities: while urban students typically enter bilingual schools with higher proficiency and lower motivation, their rural counterparts are seen as more motivated and view bilingual education as a means of upward mobility. Consequently, it is argued bilingual education functions as both a mechanism of empowerment in disadvantaged settings and a tool of social reproduction in more privileged urban contexts. The paper argues that without targeted policy intervention, e.g., particularly regarding teacher training or equitable admissions, bilingual education risks entrenching inequality rather than promoting social mobility, despite its considerable pedagogical and social potential.

Keywords:

bilingual education, language learning policy, urban-rural divide, motivation, eq(ual)ity

1 Introduction

This paper aims to investigate the perceptions of the role of bilingual education in different regional contexts, especially in connection with socioeconomic differences and social mobility in the Hungarian secondary school bilingual educational context. Similarly to numerous countries across the globe, the spread of English as a global language since the second half of the 20th century generated a demand for bilingual programmes in Hungary, where experimental bilingual programmes have existed since the 1980s. However, despite the increased spread and accessibility of English due to the proliferation of the Internet and English-mediated popular culture and media, the demand for bilingual programmes continues to increase as attested by the implementation of such programmes in a host of public, private and church-owned institutions around the country. The distribution of bilingual schools, old and new, in Hungary is heavily skewed toward Budapest and other large, economically advanced urban areas (such as cities with county rights), leaving rural townships with significantly fewer opportunities for bilingual education. This disparity becomes more consequential in light of a research indicating that urban students, due to greater exposure to English-language media and cultural influences in our globalized world, exhibit higher levels of motivation and more favourable attitudes towards learning English, which in turn generally translate into better attainment of the language (Alejo & Piquer-Píriz, 2016; Dörnyei et al., 2006; Lamb, 2012; You & Dörnyei, 2016). Furthermore, studies from Hungary and the Central-Eastern European region (Bakti & Szabó, 2016; Sherwin, 2022; Vámos, 2008, 2016) have highlighted that while schools offering bilingual programmes are somewhat privileged as a result of additional public funding and due to the socioeconomic background of the students enrolled there, various difficulties persist regarding the compatibility teaching staff, the access to high-quality teaching materials, and policy obstacles.

2 Review of Literature

2.1 Terminological Isues Regarding Bilingual Education

The terminology surrounding bilingual education, content and language integrated learning (CLIL) and dual language education is often used inconsistently, leading to conceptual ambiguities in educational discourse (Hurajová, 2015a; Trentinné Benkő, 2014; Vámos, 2016). CLIL refers specifically to an approach, predominantly used in Europe, in which subject content is taught through a foreign language with the dual objective of developing both language proficiency and subject knowledge (Coyle et al., 2010, Nikula et al., 2013, 2016). Bilingual education is a broader umbrella term that, in certain contexts, may include early immersion, heritage-language maintenance, English-medium instruction and content-based instruction programmes (Hurajová, 2015a; Illés et al., 2023), neither specifically focused on foreign language acquisition. Additionally, dual language education is sometimes used interchangeably with bilingual education; however, in certain contexts, it specifically denotes programmes that promote additive

bilingualism, in which students learn a second language with a higher-than-average number of hours while maintaining proficiency in their first language as well as their native identity (Bakti & Szabó, 2016).

The present paper uses the term bilingual education for two reasons. Firstly, it is the term that is, by far, the most commonly used term in the relevant literature published about such schools in the region. Secondly, despite the fact that the term CLIL often appears in both the mission statements of various schools and in related empirical studies, a large body of research indicates that in many cases the approach is either outright misapplied or applied in a diluted form (Coyle et al., 2010; Sherwin, 2022).

2.2 History and Legal Framework of Bilingual Education In Hungary

At the time of the decline of the Communist regimes and the subsequent regime changes, there was growing social demand for English and German language instruction as well as bilingual programmes (Hurajová, 2015b, Trentinné Benkő, 2016; Vámos, 2008, 2016). The first English-Hungarian bilingual programmes in Hungary were introduced in 1987, with 10 secondary grammar schools (gimnázium) given permission. In 1989, the first bilingual primary schools were founded with English as the chosen language for many. By the early 2000s, over 200 primary and secondary schools had some variety of bilingual education with English comprising two-thirds of these programmes (Vámos, 2008).

The first comprehensive legal framework that formally recognized bilingual schools and laid down the basic regulations was introduced in the 26/1997 Decree (MKM, 1997). The decree, which was in effect until 2012/2013, outlined the framework and aims of bilingual education, laid out the curriculum for Target language civilization studies (Célnyelvi civilizáció), and set the requirement of employing at least one native teacher and of teaching bilingual subject courses in split classes.

Today's framework is based on the the 20/2012 Decree (EMMI, 2012), which states bilingual secondary schools are required to teach at least three subjects in a foreign language, allocate a minimum of five 45-minute lessons per week to foreign language instruction, as well as at least one lesson for Target language civilization studies. Furthermore, the general outcome requirement for bilingual secondary schools is that students attain C1 proficiency according to the Common European Framework of Reference for Languages (CEFR). In reality, however, schools have to ensure that 90% of students (80% in the case of vocational schools) attain a level of CEFR B2, either by passing a language exam or the higher level matura exam. If a school fails to meet this requirement in three consecutive years, it is be stripped of the right to advertising bilingual programmes for new students (EMMI, 2012).

Bilingual programmes come with both privileges and additional burdens for schools: the subjects taught in the foreign language have to be taught in small groups, requiring classes to be split in (EMMI, 2012). This creates a demand for more English-speaking subject teachers, which incurs an extra expenditure for the educational authorities in

the case of public schools, amounting to at least one billion forints per annum (Vámos, 2016). The above-mentioned system of ensuring that bilingual secondary schools develop their students' proficiency to at least B2 level may, thus, be seen as a guarantee for the government that these extra funds are used for desirable outcomes. Lastly, as a way of curbing selectiveness in the admission procedures for bilingual programmes, schools are prohibited from testing proficiency in the target language; as such, students with no prior experience or proficiency in the language may be admitted based on their entrance exam results (Hungarian language, mathematics) and other assessments.

2.3 English Language Bilingual Secondary School Programmes in Hungary: Accessability and Equity

In the past 5–10 years, Hungary has witnessed a notable expansion of bilingual education at the secondary level, with both grammar schools and vocational institutions increasingly adopting bilingual programmes. A diverse range of maintainers (fenntartók) can be found behind these secondary schools, including the Hungarian state, church organizations, and private foundations, reflecting a broadening interest in bilingual education.

Although the number of secondary schools offering bilingual programmes in Hungary has remained relatively stable (around 70), student enrollment in these programmes has steadily increased by 14% (1,428 students) in recent years, a tendency also attested in the early 2010s by Vámos (2016). Much of the growth came from vocational schools: out of the recent surplus of students enrolled in secondary-level bilingual programmes in 2024 compared to 2020, more than 95% (1,367 students) were added by vocational schools (see Table 1). This trend can be interpreted in light of recent educational policy decisions, where the government has invested significant effort and resources in promoting vocational training among young people, while vocational schools themselves are seeking to enhance their appeal by introducing bilingual programmes, an institutional motivation described by Vámos (2016).

Bilingual secondary schools in Hungary are predominantly concentrated in large urban areas and towns, which often serve as industrial and economic centers. This urban bias is significant when considering that only 17 out of 73 bilingual secondary schools—approximately 20%—are located in towns with fewer than 50,000 inhabitants, even though 64% of Hungary's population lives in towns with similar population. This indicates a notable geographical imbalance in access to bilingual education opportunities. Furthermore, there is a strong association between the number of bilingual secondary programmes and the economic status of the counties they are located in, suggesting that socio-economic circumstances have at least an indirect effect on the interest in and the establishment of bilingual programmes. Wealthier regions are better equipped to meet the professional demands of bilingual education (e.g. teacher availability), contributing to the continued urban concentration of these initiatives.

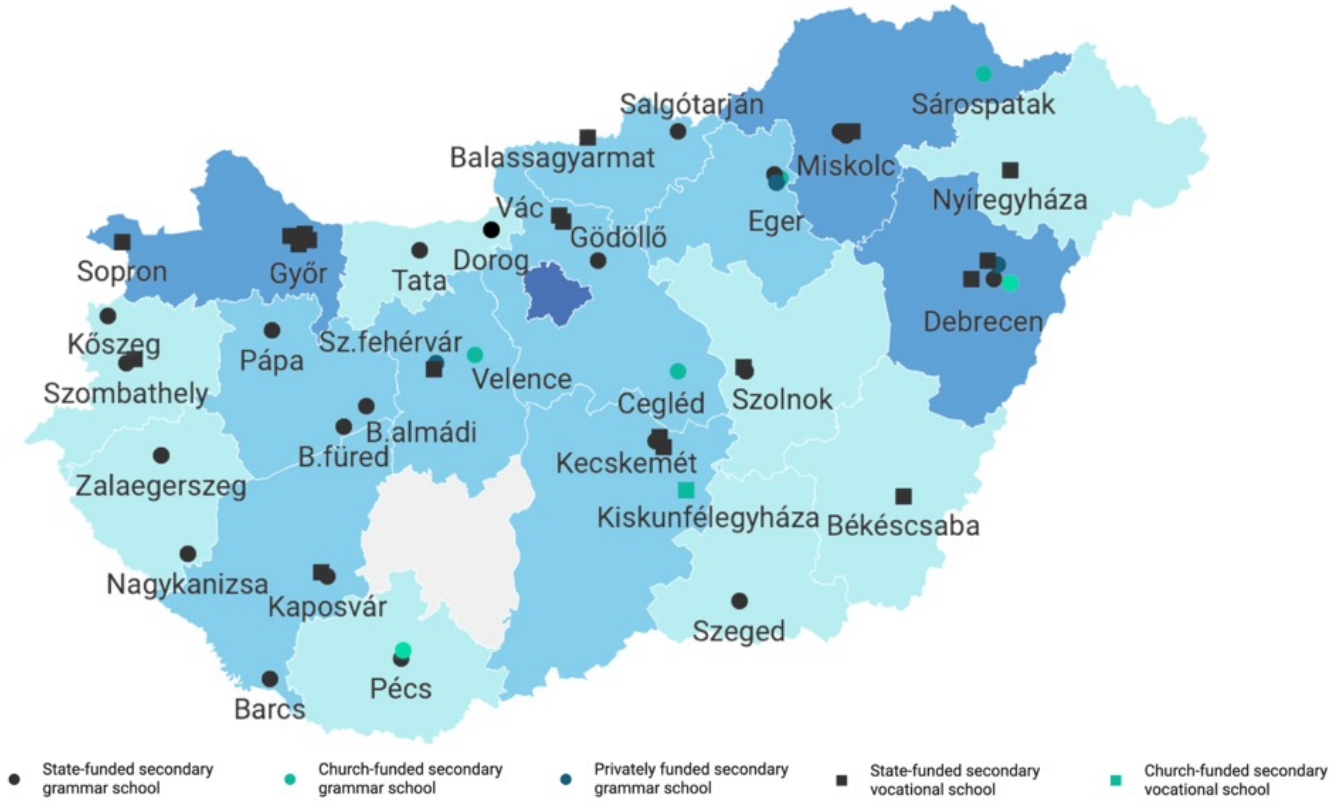
Table 1

English Bilingual Programmes and Student Enrollment in State-, Church- or Privately Funded Secondary Grammar and Vocational Schools (Data: Nemzeti Szakképzési és Felnőttoktatási Hivatal (based on personal communication with the National Institute of Vocational and Adult Education, 2025; Oktatási Hivatal (Educational Authority), 2025)

Year	N of secondary schools	N of students in English bilingual secondary grammar school programmes	N of students in English bilingual secondary vocational school programmes
2024/2025	73	5,499	5,891
2023/2024	73	5,692	5,115
2022/2023	75	5,958	4,919
2021/2022	74	5,686	4,761
2020/2021	71	5,438	4,524

Figure 1

Secondary Schools Offering Bilingual Programmes Outside Budapest (Data: Nemzeti Szakképzési és Felnőttoktatási Hivatal (National Institute of Vocational and Adult Education, 2025; Oktatási Hivatal (Educational Authority), 2025)



Note. As of 2025, there are 21 schools offering bilingual programmes in Budapest.

This broader pattern of urban concentration is not unique to bilingual programmes but reflects wider educational and demographic trends across Hungary. Economic and cultural opportunities are increasingly concentrated in the capital and larger cities, exacerbating regional inequalities. Over the past 20 years, this dynamic has contributed to the closure of dozens of primary schools, particularly in the depopulating areas (Györgyi, 2011). However, even in the most depopulating and also disadvantaged areas the local schools with longstanding bilingual programmes persist; their bilingual profile serving as a key factor in attracting students from nearby towns and villages. A case in point is Nógrád County, which has seen a 20% population decline since 1990 (13% more than the national average), and has lowest GDP of all counties at 44.2% of the national average, is still is home to two well-known bilingual institutions. It is therefore important to consider whether or not bilingual education plays a different role in social mobility in these locales compared to more urban environments. In summary, the expansion of bilingual education is shaped not only by economic status but also by patterns of internal migration and regional differences, all of which reinforce the privileged position of urban settlements in Hungary (Vámos, 2016).

Although the studies of Vámos (summarized in Vámos, 2016) did not give detailed results about socioeconomic status (SES) of bilingual schools in different regions of Hungary, her findings show that the SES of students (based on Family Backround Index, Hun. "Családiháttér-index" values) in bilingual education are significantly higher than the average of non-bilingual school students. Thus, the regional and socioeconomic disparity in bilingual education in terms of access to such programmes seems to exist; however, the existing data is still quite limited.

2.4 Teacher Shortage in English Language Bilingual Education in Hungary

One of the most pressing challenges facing bilingual education in Hungary is the shortage of qualified teachers who can effectively deliver bilingual instruction. This shortage is twofold: there is a lack of teachers who possess both subject-specific expertise and high-level proficiency in the target language, most often English or German (Sherwin, 2022). Many teachers report feeling inadequately prepared to teach complex subjects in a foreign language, which negatively affects their confidence and the quality of instruction. Hungarian studies; however, have not focused on the regional or socioeconomic factors behind such shortages, but it is justifiable to hypothesize that urban schools in better socioeconomic environments are more likely to attract teachers.

Furthermore, formal bilingual teacher training opportunities are greatly limited in Hungary, leading most educators to rely on self-training and informal professional development, such as workshops or peer mentoring, to build their bilingual competence (Trentinné Benkő, 2016). This results in inconsistencies in pedagogical approaches across schools and places a heavy burden on teachers, who must not only master dual-

focused methodologies but often also create their own teaching materials due to the lack of appropriate bilingual textbooks (Bakti & Szabó, 2016; Pérez Canado, 2012; 2016a; Sherwin, 2022).

Similar issues have been documented across Europe, where teacher preparation has repeatedly been identified as one of the main problems for successful CLIL implementation. Pérez Cañado (2016a, 2016b) argues that the expansion of bilingual programmes has far outpaced the development of adequate teacher education systems, resulting in a persistent shortage of competent professionals; thus, teachers often enter the classroom without sufficient methodological training, leading to uneven instructional quality and increased workload. Studies also suggest that this problem is even worse in the case of STEM teachers Without systematic, state-supported training programmes, the teacher shortage will remain a major bottleneck, which will hinder the equitable and effective expansion of bilingual education in Hungary.

2.5 Language Proficiency and Motivation across the Urban-rural Divide

Over the last three decades, numerous studies have investigated the urban-rural divide in English language learning and have identified patterns of differences between urban and rural learners in terms of, for example, motivation and attitudes (Dörnyei et al., 2006), contact with the language and culture (Csizér, 2020; Dörnyei et al., 2006; Lamb, 2012), and social background and capital (Alejo & Piquer-Píriz, 2016; Butler & Le, 2018; Wu & Tarc, 2024), all of which, in an interconnected way, contribute to an overall disparity in L2 attainment.

As a general rule, research indicates that urban students often achieve higher levels of English proficiency due to increased exposure to English-language media, popular culture, and direct interactions with globalised cultural products (Alejo & Piquer-Píriz, 2016; Dörnyei et al., 2006, Lamb, 2012; Sundqvist, 2009). This effect, combined with the generally higher socioeconomic status in urban contexts, is also visible in Hungary: reports from the nationwide foreign language assessments conducted by the Oktatási Hivatal [Educational Authority] show a stepwise association between the size of a settlement and students' foreign language scores (Oktatási Hivatal, 2016, 2021). Understanding the disparities stemming from the urban-rural divide provides an important context for analyzing what kind of advantages that bilingual education can provide learners from varying backgrounds, and as a result, how it might influence social mobility at the regional level.

2.6 Bilingual Education in Europe: Issues of Access, Elitism and the Urban-rural Divide

Similarly to Hungary, across the whole of Europe, bilingual education has been promoted as a way to democratize language - most notably the English language - as

linguistic capital; however, the studies show vast regional differences and contrasting results, which are often linked to the implementation of such programmes. Moreover, researchers have criticized bilingual education for being inherently elitist, arguing that it often selects for high-achieving, motivated, and higher-SES students, thereby reinforcing stratification rather than democratizing access (Bruton, 2013; Paran, 2013).

Pérez Cañado (2018), after conducting a comprehensive study across various regions of Spain, reported that while some factors (e.g., general academic ability, motivation) impact both bilingual and non-bilingual learners, socioeconomic status (SES) and notably the urban-rural divide did not exert as strong an effect in bilingual settings as in regular programmes. Another large-scale study from Spain (Lorenzo et al., 2020) supports the equalizing potential of bilingual programmes: compared with monolingual programmes that display a pattern of positive correlation between SES and achievement (i.e. high-SES students achieve better results), students in bilingual programmes perform equally well in L1, L2, and content regardless of SES. However, bilingual programmes alone do not eliminate the effects of SES, as factors affecting second language acquisition (SLA), such as the amount and quality of extramural English exposure, are also directly linked to SES (Lázaro-Ibarrola, 2024; Sundqvist, 2009).

At the same time, if unaddressed in policymaking, bilingual programmes may become selective and elitist due to structural, socioeconomic reasons. As an example, in the Flemish Community of Belgium, a comprehensive analysis of 948 secondary schools found that SES composition and school size were the strongest predictors of whether a school offered English bilingual programmes at all (Caira et al., 2023). In the Walloon Region of Belgium, the work of Van Mensel et al. (2020) claimed, after studying the SES and verbal/non-verbal intelligence of 900 students, concluded that the bilingual system is highly selective and elitist as only high SES was found to be a significant factor behind enrollment in bilingual programmes. It is also important to highlight that bilingual programmes across Europe are more common in urban, socioeconomically more developed regions (Caira et al., 2023; Llinares & Cross, 2022) with better infrastructure and teacher availability; furthermore, they tend to be also sought after by more privileged families living there (Van Mensel et al., 2020). Bilingual programmes may also offer study tracks with varying levels of language exposure: in Spain, Tompkins (2022) found that high exposure bilingual tracks (where students take more subjects in English) had much higher enrollment from high SES students than their low SES counterparts, reinforcing social differences through schooling. Studies (e.g. Caira et al., 2023; Tompkins, 2022) also suggest that lower-SES families often lack awareness or confidence to pursue bilingual options, limiting equitable access despite their potential benefits.

A last but nevertheless important point is that some of the success of bilingual programmes has been attributed to self-selection bias: students with greater intrinsic motivation and keenness towards language learning enrol more frequently in bilingual programmes (Bruton, 2013; Mearns et al., 2020). This phenomenon might also be explained by a variety of background factors, such as better parental support and, in some cases, a stronger baseline language proficiency due to extracurricular exposure (Bruton, 2013). In certain cases, these problems are often compounded by actively selective

admission policies (Lorenzo et al., 2020) that "skim the cream of the crop", resulting in higher-SES students being generally overrepresented, showing that it is the responsibility of policymakers to eliminate the "cream-skimming" practices by abolishing selective admission.

Altogether, research shows that bilingual programmes have positive effects that transcend the socioeconomic and urban-rural divides; however, their implementation and the policy answers to the variety of equity and equality issues surrounding them are key to harness the socially mobilizing effect of such programmes.

2.7 The Hungarian research gap

Despite the prevalence of bilingual education in Hungary since the late 1980s, systematic research on its implementation and implications remains limited. Most studies have focused on pedagogical practices or language outcomes (e.g. Várkuti, 2010), while few studies have investigated bilingual schooling and its connection to issues of educational equity, regional disparities, and social status are scarce. Some works, such as Sherwin (2022), have identified a variety of problems faced by bilingual school teachers (e.g., scarcity of materials, limited teacher development); however, only few works, such as Vámos (2016), have examined bilingual programmes through the lens of language policy, exploring how they reflect and socioeconomic inequalities. As a result, the complex relationship between bilingual education, questions of social mobility, and language policy in Hungary remains underexplored. The present study aims to serve as the first in a new line of empirical research aimed at revitalizing academic interest in Hungarian bilingual education.

3 Research method

As previous research suggests, socioeconomic status (Alejo & Piquer-Píriz, 2016; Butler & Le, 2018; Wu & Tarc, 2024) and geographical context (Dörnyei, et al., 2006; Lamb, 2012; You & Dörnyei, 2016) plays a significant role in shaping students' motivation, exposure, and access to English. Urban and higher SES students tend to experience greater informal exposure with English while learners in rural, less affluent areas often face more limited opportunities. These differences may, in turn, influence the perceived effectiveness and everyday challenges of bilingual education, as teachers working in different environments cope with the local conditions.

To investigate how such contextual factors intersect with the social and institutional realities of bilingual programmes, the study employs a qualitative, small group interview-based approach focusing on secondary school teachers' views. It explores how teachers in three different locations conceptualize the role of bilingual education in promoting language learning and social mobility, how they interpret differences in student motivation

and access within their local contexts, and what kind of challenges or problems they identify in bilingual education in Hungary. Specifically, it addresses the following research questions:

RQ1. What challenges do the teachers identify in implementing bilingual education, and how do these challenges reflect local conditions?

RQ2. How do the teachers perceive their students' linguistic backgrounds and motivation?

RQ3. In what ways do the teachers view bilingual education as a mechanism for social mobility or, conversely, as a form of elitist selection?

3.1 Setting

In order to capture the diversity of such experiences, maximum variation sampling was used to select three widely different schools from different parts of the country as cases for the study. Table 2 below presents data about the schools included in the study:

Table 2

Background Data on Schools Represented in the Study

School	Location	Type	Nr. of students in bilingual programme
Capital school (CS)*	Budapest, capital city	public secondary grammar school	512
Large town school* (LT)	Town with county rights of more than 100.000 inhabitants	public secondary grammar school	222
Small town school* (ST)	Town of less than 50.000 inhabitants	public secondary grammar school	124

*As per the request of the participating schools, their names have been anonymized. The abbreviations CS, LT, and ST are used in the study in quotations.

3.2 Participants

In each school, a small focus group session was conducted with three teachers in order to facilitate in-depth discussion on a broad range of topics and experiences.

The composition of the three-person groups was also structured to capture a diverse set of experiences and views from institutional, curricular and classroom perspectives: thus, the participants included (1) a member of the school administration, (2) the head of the English department, and (3) a subject teacher teaching in English were asked to participate. *Table 3* presents information about the participants and the schools they represented:

Table 3

Background Data on Focus Group Interview Participants in the Study

Participant	Gender	Settlement	Role(s)	Years of experience in bilingual school
Theresa	female	Budapest	principal, Hungarian literature teacher	8
Selena	female	Budapest	vice-principal, science in English teacher	20
Anna	female	Budapest	EFL teacher, head of English department	14
Andrew	male	Large town	vice-principal, history in English subject teacher	28
Adriana	female	Large town	vice-principal, German as a FL teacher	21
Georgia	female	Large town	EFL teacher, head of English department	20
Rhea	female	Small town	principal, geography in English teacher	16
Jill	female	Small town	EFL teacher, head of English department	20
Moira	female	Small town	history in English subject teacher	35

Note: All participant names are pseudonyms.

3.3 Data collection

The focus group interviews followed a semi-structured interview protocol that included a range of questions (see *Appendix*) on curriculum implementation, teacher training, classroom challenges, and perceptions of student outcomes in bilingual education. This semi-structured approach ensured the comparability of sessions

while also allowing for participants to elaborate on issues they considered important. Two months prior to live data collection, the interview protocol was piloted with two different participants in person, which allowed for the addition of questions based on the responses to probes and the fine-tuning of certain questions.

All sessions were held online via Microsoft Teams, recorded with participants' consent and transcribed using the application. Each session lasted around 90-100 minutes and was conducted in the spring of 2025. After the interview, the raw transcripts created by Teams cleaned and verified against the actual recordings to prepare them for data analysis.

3.4 Data analysis

The interview data were analyzed using thematic analysis, which involved identifying, coding, and interpreting recurring patterns of meaning, guided by the constant-comparative method (Glaser & Strauss, 1967; Maykut & Morehouse, 1994). The coding was carried out manually without the use of qualitative data analysis software, and a co-coder independently reviewed portions of the data to enhance credibility.

The first round of open coding involved assigning descriptive labels to meaningful units of text that reflected teachers' experiences, attitudes, or concerns. Codes were kept close to the participants' language, often using *in vivo* phrasing. To ensure consistency, each transcript was reread after each coding round, which helped to refine the codes for clarity. The codes were then compared within and across the three transcripts and clustered into categories with clearly defined boundaries. Finally, categories were synthesized into overarching themes that encapsulated the broader meanings emerging from the data.

4 Results and discussion

This section presents the main findings from the three semi-structured interviews conducted with teachers from the three participating schools. The analysis follows the three guiding research questions, exploring (RQ1) the main challenges of implementing bilingual education, (RQ2) teachers' perceptions of students' backgrounds and motivations, and (RQ3) their views on bilingual education as a tool for social mobility or selection.

In the subsequent sections, the main themes identified in the qualitative data analysis are presented in relation to the research questions. Each theme is discussed in the context of the relevant codes and categories, and supported by verbatim quotes from the transcripts.

Table 4

A Tabular Representation of Themes, Categories, Codes and Quotes

Theme	Category	Analytical Codes	Verbatim Quotes
Systemic challenges	Staffing	recruitment problem; lack of bilingual-qualified teachers; STEM teacher gap	"You can't find teachers who both know their subject and speak the language well enough; the training system doesn't produce them." (Andrew, LT) "We can hardly find a math teacher even in Hungarian, let alone someone to teach it in English." (Selena, Capital)
	Teaching materials	lack of textbooks; reliance on self-made materials	"There are no proper bilingual coursebooks for our subjects, so everyone ends up putting their own material together." (Georgia, LT) "I also have my own materials that I have produced myself, and I collect them from here and there, but to this day I still make worksheets…" (Rhea, ST)
	Neglect	lack of financial incentives; no recognition of extra workload	"Bilingual education requires much more work, but there is no extra pay for it." (Adriana, LT) "We always hear about how important bilingual programs are, but we don't get any extra resources, nor time, or money." (Adriana, LT)
Students' diverse backgrounds and motivations	Prior exposure	urban–rural disparity; varied baseline proficiency	"For some children, this is the first time they have really learned English, because before that they had only heard it, but not used it." (Jill, ST) "We really rarely get true beginners. Thanks to digital technology, they have been exposed to it to some extent since the age of three." (Theresa, Capital)
	Motivations and ambitions	instrumental motives; motivational plateau	"Coming here is a kind of status symbol… For them it represents a kind of motivational standard." (Moira, ST) "They come in already speaking well — sometimes too well. They don't see why they should still work hard at it." (Anna, Capital)
	Family background	lower status families vs affluent elite	"Parents are unaware of this […] opportunity because we live in a very disadvantaged district." (Rhea, ST) "Students have access to all the latest digital technology at home, and they come in contact with English all the time." (Selena, Capital)
Both mobility and selection	Mobility	social uplift; empowerment through language	"Our school is a great channel for social mobility… anyone who comes from a family where no one has been an intellectual or a doctor or a lawyer before can get the basics here." (Georgia, LT) "We live in a very, very disadvantaged district. So this is something special that we can give them." (Rhea, ST) "You'll have a broader perspective on a thousand things. […] A whole world opens up" (Moira, ST)
	Elitism / selection	maintenance of advantage; convenient for some students	"I feel that bilingualism doesn't give students as much of an advantage as it used to, because they start from a higher level." (Anna, Capital)

4.1 Challenges of Implementing Bilingual Education

Altogether, the main theme that crystallized in response to RQ1 was that there are a variety of systemic problems (mainly staffing and materials) in bilingual education that are compounded by existing socioeconomic differences, bureaucratic challenges, and a general neglect from policymakers.

4.1.1 Staffing. One of the main categories identified related to the challenges of bilingual education was the idea of staffing and teacher shortages, reflected in several relevant codes pointing to a (pending) crisis in teacher recruitment, a lack of qualified teachers, and the ever-present problem of attracting STEM teachers.

All three schools reported an acute shortage of teachers qualified to teach in bilingual programmes. Recruiting educators who can teach both their subject and in English is increasingly difficult, especially as teacher training programmes across the country rarely prepare candidates for bilingual instruction. Participants also mentioned that many applicants possess only intermediate (B2) English proficiency, which is insufficient for teaching their subjects in English, while experienced bilingual teachers are few or nearing retirement, leaving programmes , especially in the rural regions, seemingly unsustainable:

> Over the past eight years, six of them have been very difficult in terms of providing basic lessons due to a shortage of specialists and low salary, so it was difficult to find math teachers in the first place. And now, all of this is in English … Also, a language teaching degree was required in the past, but they tried to alleviate this by removing this requirement, and now you can teach with a C1 language exam, but this can obviously lead to a decline in the quality of bilingual education. (Theresa, Capital, principal)

> You can't find teachers who both know their subject and speak the language well enough; the training system doesn't produce them. (Andrew, LT, vice-principal, subject teacher)

> We're fine now, but when X retires, we'll have a serious problem finding someone […]. (Rhea, ST, principal)

> We depend on a few key people, and when they leave, it'll be very hard to keep the programme going. (Rhea, ST, principal)

> For rural schools like ours, bilingual education only works because of individual commitment; there's no system behind it [to support it]. (Rhea, ST, principal)

The shortage is most severe in STEM subjects where bilingual-qualified teachers are virtually unavailable. As a result, schools either leave these courses understaffed or rely on teachers with partial qualifications or strong English proficiency but no formal subject training.

> In chemistry and physics, there are practically no bilingual teachers left. It will be a matter of who [from the present teachers] can survive the workload. (Budapest)
>
> We can hardly find a math teacher even in Hungarian, let alone someone to teach it in English. (Selena, Capital, vice-principal, subject teacher)
>
> We're advertising for mathematics positions, but we have zero applicants. (Andrew, LT, vice-principal, subject teacher)
>
> We cannot entrust the teaching of these [STEM] subjects in a foreign language to just anyone. So this is a very serious challenge to find the right person. (Adriana, LT, vice-principal)
>
> There's no one in the area who could teach geography or biology in English — we'd have to bring someone from [regional large town] or even further. But I don't know if we can attract anyone. (Rhea, ST, principal)

Interestingly, on the surface level, there appear to be are no regional or socioeconomic disparities related to these challenges. However, the reality is that small town schools will continue to struggle to attract qualified staff due to their isolation and fewer out-of-school opportunities for teachers. The respondents from the Small Town School have even pointed out that their programme might eventually become unsustainable after a while due to the lack of qualified teachers. The problem is also present in the urban environments; however, the transcripts imply that the Capital School is able to compete with others for the teachers, whereas the Small Town school might not. Despite contrasting contexts, it is important to highlight that they both rely on individual commitment rather than structural support, revealing systemic problems in bilingual teaching.

The teacher shortage echoes findings from broader European research, which consistently highlights this as a key bottleneck for the success of bilingual education (Pérez Cañado, 2016a, 2016b). Hungarian teacher training has, for a long time, lagged behind the rapid expansion of bilingual programmes, producing a mismatch between the ambition of schools and policymakers and the availability of labour. The acute lack of STEM teachers is to be seen as merely an extension of the general lack of STEM teachers in Hungary, exacerbated by the problem of the requirements of bilingual teaching. The urban–rural divide observed here mirrors regional inequalities documented in Spain (Pérez Cañado, 2018) and Belgium (Caira et al., 2023), which showed that urban schools are in a much better position to compete for the limited pool of teachers.

4.1.2 Teaching Materials. Another emergent category of codes related to the availability of suitable materials for bilingual education, including English and content subjects taught in English. Most of the schools identified teaching materials as a significant issue, noting that teachers often have to gather, translate and copy various haphazardly found materials, which are still often not well-aligned with the Hungarian curriculum.

> There are no proper bilingual coursebooks for our subjects, so everyone ends up putting their own material together. (LT, Georgia, head of English)

> We are also trying to revise and translate the English materials, but a lot of it needs to be rewritten to meet Hungarian requirements. (LT, Andrew, vice-principal, subject teacher)

> I also have my own materials that I have produced myself, and I collect them from here and there, but to this day I still make worksheets and all sorts of things... (ST, Rhea, principal)

> Of course, we always get asked why we don't write [the books], but I have my answer: well, because we do so many other things. (ST, Moira, subject teacher)

> As a language teacher, I also miss a book for the preparatory year that is really intended for bilingual schools. [...] We also have a lot of material, which is obviously not a problem, but it would be nice to have a guideline like this. (ST, Jill, head of English)

> In ethnic [Hun. nemzetiségi] education, there are textbooks for almost every subject, but in bilingual education, there are none. (Capital, Theresa, principal)

> Not only are there no textbooks, but even if we wanted to buy them, we couldn't order them [from the public list]. So here we have free textbooks, but there's nothing to order.

However, in cases where good quality resources exist, socioeconomic disparities or bureaucratic barriers also exacerbate access to them.

> So there are some subjects where you can find good books written in English, but the only way for us to get these if we ask the [...] parents to make in investment. (Andrew, LT, subject teacher)

> There are some books, for example, for history that are well-aligned with the Hungarian curriculum, but they are not supported by the school district. And I can't ask the parents here to pay 5-10.000 forints for the books. (ST, Rhea, principal)

> It's very controversial that we can't ask for extra money [to buy books], but they don't provide textbooks either — and they say we can't photocopy more, even though there's nothing we can work with. (Capital, Theresa, principal)

The lack of high-quality teaching materials is a well-documented weakness in the implementation of bilingual teaching across Europe, where teachers are often forced to act as "material designers" (Pérez Cañado, 2012, 2016a, 2016b), which further increases their already excessive workload. As the interview excerpts suggest, in Hungary, this problem is compounded by various other factors that further limit access to high-quality resources.

4.1.3 Neglect

A third theme that emerged across the interviews was teachers' perception of systemic neglect toward bilingual programmes. This is reflected in inadequate state support, which is manifested in the absence of material incentives, and a lack of institutional recognition for teachers' additional work.

> Bilingual education requires much more work, but there is no extra pay for it. (Adriana, LT, vice-principal)
>
> We always hear about how important bilingual programs are, but we don't get any extra resources, nor time, or money. (Adriana, LT, vice-principal)
>
> It pains me that, in the past, colleagues who taught subjects such as mathematics or history in a foreign language received a language allowance. Don't tell me that it's the same amount of work as if someone were teaching only in Hungarian, and that language supplements have been nicely eliminated. So, I would say that we should appreciate the work of these colleagues who are doing so much more... (Andrew, ST, vice-principal, subject teacher)
>
> Bilingual education requires much more energy here too, but the support is the same as for a regular class. (Moira, ST, subject teacher)
>
> We have also tried to point out to the policymakers that some kind of special allowance or supplementary salary would be necessary, but they said this does not apply to bilingual education [...] Our school district, however, does give an allowance but only to subject teachers. (Theresa, Capital, principal)
>
> It's great that subject teachers receive some extra income, but teaching only English in a bilingual setting is also much more demanding, but it's not rewarded. (Selena, Capital, vice-principal, subject teacher)

The perception of neglect voiced by teachers aligns to some extent with findings from European bilingual research highlighting the lack of institutional support (Pérez Cañado, 2012, 2016); however, financial issues are rarely mentioned in extant literature. It may nonteheless be stated however that despite being a highly sought after form of education, bilingual programmes in Hungary appear undervalued, with teachers receiving neither financial nor professional recognition for their additional workload.

In summary, teachers across the three schools described persistent structural problems in bilingual education. The severity and nature of these problems reflect local contexts: thus, a clear theme emerging from interview data is the presence of the structural asymmetries present in bilingual education, mostly evident in the availability and the training of teachers. However, it must be said some of the issues, such as the lack of useful teaching materials and available teachers, are common to all all bilingual schools.

4.2 Teachers' Perceptions of Students' Linguistic Background and Motivation

The second research question focused on teachers' perceptions of new students' proficiency, family background and motivations. The theme emerging from the data analysis highlights how socioeconomic and geographical differences translate into differening attitudes, motivations, and educational trajectories.

4.2.1 Students' language proficiency and prior exposure to English.

A key emerging category of codes in the teachers' responses concerned the diversity of students' English proficiency levels upon enrolling in bilingual education. However, an important socioeconomic and geographic pattern took shape when comparing the responses from the Small Town, Large Town, and Capital city schools. The Small Town and Large Town teachers highlighted notable variation in preexisting proficiency levels, while the Capital City teachers reported a much higher baseline and mentioned that some students even arrived with "too high" proficiency:

> Roughly half of them are true beginners or false-beginners, while the rest already know the language better or have passed a language exam. (Rhea, ST, principal)
>
> For some children, this is the first time they have really learned English, because before that they had only heard it, but not used it. (Jill, ST, head of English)
>
> There is one advanced, one intermediate, and one elementary group. So it's diverse. (Georgia, LT, head of English)
>
> We really rarely get true beginners. Thanks to digital technology, they have been exposed to it to some extent since the age of three, not to mention games, which are also mostly in English. (Theresa, Capital, principal)
>
> For linguistic background, [our students] often meet authentic foreign-language because families are often bilingual or they travel or move a lot. (Selena, Capital, vice-principal, subject teacher)
>
> [They already have good language skills], but usually those who play video games, strategic video games, for example, and I don't know, they discuss with someone Honolulu how to shoot the enemy [in a game]. (Anna, Capital, head of English)

The transcripts reveal a perceived gap in students' pre-existing English proficiency when the locations are compared, echoing studies that link exposure and digital engagement to language development (Sundqvist, 2009). Also, the urban-rural divide is somewhat discernible: urban students, particularly in the capital, often arrive with substantial competence gained through prior schooling and exposure to English, while learners from more rural areas tend to be true beginners, a statistic reflected in the findings of the Educational Authority (2016, 2021).

4.2.2 Students' Motivations and Ambitions

The codes related to the category of motivations and ambitions show that the majority of students in the Small Town and the Large Town are perceived as highly motivated to learn a foreign language for a variety of reasons, including the symbolic capital associated with bilingual schooling (an instrumental motive) or the perceived ease of English to compared to German:

> Coming here is a kind of status symbol. So, for our families, it's a motivating factor, and that's good for us that they're proud of it. For them it represents a kind of motivational standard or cultural standard. (Moira, ST, subject teacher)

> I notice that there are more children like this who come to the bilingual school because they don't want to work hard to learn German or anything else, so they like English because it comes easily to them. (Adriana, LT, vice-principal)

Interestingly, Anna (Capital, head of English) went as far as to say that their students "come in already speaking well — sometimes too well. They don't see why they should still work hard at it." This raises important questions regarding enrolment policies and entrance exams, as well as student motivation. Another quote from her illustrates her point:

> We had a colleague who, before that, had experienced that while teaching at the bilingual school in Miskolc, the students regarded the entire education as if he were seeing "gods", because they knew that getting a certificate from that bilingual school could change his life completely. Then here in our school, she had this feeling that the kids were doing him a favor by sitting in on his classes. (Anna, Capital, head of English)

> This is a perennial question for us, why can't we get children interested in learning a very high level of language [after a certain level]? (Theresa, Capital, principal)

Thus, students in the Capital City bilingual school appear to achieve a high level of English but then tend to plateau. They are perceived as being insufficiently motivated to continue putting extra effort after achieving their goals, which they likely reach earlier than students from other schools due to their backgrounds.

The issue related to the motivation of high-achieving students in bilingual schools also appeared excerpts from the Small Town and Large Town school, with the two schools adopting internal policies to prevent students from finishing their English studies too early:

> A year ago we made a decision that everyone should learn English by the end of the 11th grade. There were some students before who reached the required level by 10th grade, but some colleagues like Moira said that they start forgetting the language [...] (Rhea, ST, principal)

> At our school, it is not possible to take early language proficiency exams. So, our educational program includes the rule that they cannot do this, because otherwise… I mean this is how we try to maintain motivation, by forcing them, so to speak. (Andrea, LT, vice-principal, subject teacher)

The data revealed some contextual differences in students' perceived motivation, with the symbolic and instrumental value of bilingual schooling appearing as a key factor in some cases. However, in some cases, as attested by the Capital city school, motivation declines among high achieving students, who perceive English as already mastered. Similar dynamics, where early attainment leads to reduced motivation, have been noted in other contexts, such as the Netherlands (Mearns et al., 2020). This underlines the importance of non-selective enrolment policies to ensure that more lower-status and lower-proficiency students should be admitted into bilingual education to harness its transformative potential.

4.2.3 Students' Family Background. The interviews revealed that the schools serve students from distinct family backgrounds that closely mirror their geographical and social contexts.

In the Small Town, students largely come from disadvantaged or working-class families with limited educational capital and few foreign-language opportunities. It was also suggested that parents might not even be familiar with the advantages bilingual education can provide:

> Parents are also unaware of this learning opportunity because we live in a very disadvantaged district. […] I can say that the families who live here cannot afford expensive language courses, for example. (Rhea, ST, principal)

> Very often we get students from villages where they didn't even have subject teachers or proper English teachers. (Jill, ST, head of English)

In the Large Town, the student body represents a mix of first-generation intellectuals from urban and rural families aspiring to upward mobility, alongside much wealthier, highly educated urban families as well:

> There are many first-generation intellectuals whose parents did not graduate from university at all. And there were many children from rural areas in my previous class… Really, with parents who did not think about why their children should go to university. (Georgia, LT, head of English).

> Children from a wide variety of family backgrounds come to us, so I can't say that they are particularly elite, but there are some who are highly educated. So there are students whose parents are very wealthy, lawyers, doctors, I don't know who else. (Andrew, LT, vice-principal, subject teacher)

In contrast, the Capital city school serves students from highly educated, higher-

status, and cosmopolitan families, where English is already part of everyday life and schooling might be seen as a way of reinforcing this advantage.

> We are now talking to families about a school in a wealthy District, where students have access to all the latest digital technology at home, and they come in contact with English all the time. [...] Or they have relatives who live in target language countries, and there is the possibility of communication without the school having to do anything. (Selena, Capital, vice-principal, subject teacher)

The quotes above illustrate how bilingual education reflects existing social stratification, with each schools' student pool closely aligned with their regional and socioeconomic contexts. These patterns are similar to other European settings, where both programme access and awareness have been found to correlate with families' educational capital (Caira et al., 2023; Tompkins, 2022). In Hungary, this suggests that bilingual education may inadvertently reproduce inequalities despite its significant potential for social mobility.

4.3 Social Mobility or Elitist Selection

The final research question examined whether the teachers viewed bilingual education as a channel for upward social mobility or as a mechanism reinforcing the existing advantages of a social elite. The main emerging theme from the responses reflects a dual perspective: while the teachers perceive bilingual schooling as a powerful force for social mobility, they also recognize problems related to access and selection in their respective contexts.

When asked, teachers in both the Small Town and the Large Town consistently portrayed bilingual education as an empowering tool enabling mobility within their local contexts: one that expands access to opportunities and helps bridge gaps stemming from lower SES (socioeconomic status). In both schools, bilingual programmes are seen as a fast-track for higher language proficiency and also as gateways to higher education, particularly for students who would otherwise lack such opportunities.

> Our school is a great channel for social mobility. So anyone who comes from a family where no one has been an intellectual or a doctor or a lawyer before can get the basics here that will probably get them into this university, and that's why they didn't have to pay extra tuition fees or enroll in extra language courses. (Georgia, LT, head of English)

> We live in a very, very disadvantaged district. So this is something special that we can give them [...] We don't have families who can afford expensive language courses and private tutors. (Rhea, ST, principal)

> I also see that language is a kind of opportunity for them to excel, and we really represent a high standard in this. (Jill, ST, head of English)

This perception of bilingual education as a potential social equalizer reflects the findings of Pérez Cañado (2018) and Lorenzo et al. (2020), whose studies in Spain have shown that, under supportive conditions, bilingual programmes can narrow educational gaps otherwise created by differences in SES.

One teacher from the Small Town clearly links bilingual education to opening new channels of knowledge, which might in turn help students' socioeconomic or educational advancement. She suggested that learning subjects in a foreign language broadens students' perspective and opens access to global sources of knowledge beyond the limits of Hungarian-language materials:

> You'll have a broader perspective on a thousand things. [...] Let's say we're talking about history. Now, especially with the use of the internet, a whole world opens up, but if I only look at Hungarian-language materials, then it's still a rather limited story. So I think that learning a subject in a foreign language will produce a whole different way of thinking in children. (ST, Moira, subject teacher)

In the Capital, teachers did not describe bilingual education as a tool of empowerment, and no clear theme crystallized in this context. However, as already noted in the section on motivation, they commented that many students arrive with an already high SES and markedly higher level of proficiency. As Anna, the head of English, remarked:

> I feel that bilingualism doesn't give students as much of an advantage as it used to, because they start from a higher level. (Anna, Capital, head of English)

> We have many kids who lived abroad or have foreign parents, and in the preparatory year, I felt like they didn't understand what the point was. (Anna, Capital, head of English)

Altogether, while the Small Town and Large Town schools enable less advantaged or first-generation students to access higher education and overcome socioeconomic barriers, in the Capital context, bilingual education might be seen as a tool of maintenance, serving already higher SES and higher proficiency students aim by reinforcing their existing advantage, as implied by the studies of Caira et al. (2023) and Tompkins (2022).

Thus, one of the main challenges to the transformative social potential of bilingual education in Hungary might lie in enrolment and selection policies in Hungary as also suggested by several studies (Caira et al., 2023; Mearns et al., 2020; Tompkins, 2022; Van Mensel et al., 2020). This dynamic reflects the dual nature of bilingual education: while it can serve as a mechanism of empowerment and social mobility for less advantaged, lower-SES learners, in certain cases it functions as a mechanism of social reproduction in more privileged contexts.

5 Conclusion

The findings of this study portray a complex picture of bilingual education in Hungary, showing both its potential and its structural challenges. In response to RQ1, teachers across all three schools identified persistent structural problems, including a shortage of bilingual-qualified teachers, a lack of appropriate teaching materials, and a general sense of neglect from policymakers. These issues align with European research highlighting similar obstacles to bilingual implementation (Pérez Cañado, 2012, 2016a, 2016b,; Sherwin, 2022). However, the interview data also showed that these challenges are shaped by local socioeconomic realities, with small-town, more disadvantaged schools facing far more acute recruitment difficulties and resource shortages.

Regarding RQ2, teachers reported considerable variation in students' linguistic backgrounds, motivations, and circumstances, all of which were closely linked to regional and social contexts. Students in rural or small-town schools were perceived as more motivated, viewing English as a pathway to upward mobility, while urban students often arrived with high proficiency but lower motivation to improve further. These findings mirror broader studies in SLA research related to SES, the urban-rural divide, and language learning (Butler & Le, 2018; Lamb, 2012; Dörnyei et al., 2006; Mearns et al., 2020).

As regards RQ3, the interviews reflected the dual nature of bilingual education: in less advantaged contexts, it acts as an empowering mechanism of social mobility, yet in elite urban environments, it can function as a mechanism of social reproduction among privileged groups (Caira et al., 2023; Pérez Cañado, 2018; Tompkins, 2022). This underscores the importance of reviewing enrolment policies and expanding access to ensure that bilingual education fulfils its potential rather than reinforcing privilege.

The findings underscore the importance of reviewing enrolment and selection policies (and their proper enforcement) to ensure that bilingual education can fulfil its equalizing potential rather than reinforce existing hierarchies. If bilingual programmes in urban environments continue to attract primarily higher-SES and already proficient students, there is a risk of them becoming elite programmes rather than vehicles for upward mobility.

However, extensive new research is needed to gain a more in-depth view of the complexities of bilingual education in Hungary, which involves at least 20.000 students at the secondary level. Such research should combine qualitative data with student and teacher questionnaires, large-scale statistical analyses based on publicly available data, and longitudinal tracking to understand how bilingual schooling shapes students' trajectories. Hopefully, similar studies would be able to inform evidence-based educational policy, which could ensure that bilingual education becomes a tool for opportunity and equity through the acquisition of linguistic and cultural capital, particularly in Hungary's more disadvantaged regions. To achieve this, educational decision-makers must also address the structural issues revealed in this study, particularly teacher shortages, the lack of materials, and the perceived institutional neglect, as these factors disproportionately affect less advantaged regions and further deepen inequalities.

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Appendix

Interview protocol

1. Please, present how bilingual education works at the school. (Classes, grades, enrollment numbers, subjects, staffing requirements, exams, etc.)
2. What are the main challenges you face in implementing the bilingual program, whether they are related to pedagogical, administrative, material, or staffing issues?
3. How does the education system (e.g., number of lessons, final exams, assessments) and education policy support or hinder the functioning of bilingual education?
4. What improvements/developments would be needed to help the school achieve its bilingual goals at the highest possible level?
5. How does bilingualism influence the school's profile? How important is this to the school's profile? To your knowledge, how important is this factor in school enrollment/admission?
6. What level of English proficiency do students need to be admitted to bilingual programs? How are they assessed throughout the different grades?
7. What are the basic further education/career goals of students when they enter the school? How does this relate to English bilingualism?
8. What can you say about the motivational levels of incoming students in the bilingual programme?
9. What is the students' feedback on bilingual education? To what extent does it meet their expectations?
10. Bilingual programs are sometimes considered elite/elitist in Hungary. To what extent can your school be considered elite in the local environment, compared to other schools?

3

Exploring Teachers' Technology Use in a Hungarian University Teacher Training Programme

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Abstract

Extensive research has been conducted on technology integration in the English as a Foreign Language (EFL) classroom (Batubara, 2021; Bui, 2022; Chaaban & Ellili-Cherif, 2016); however, research on in-service teachers' perceptions of technology integration at the tertiary level in Hungary remains limited. To address this gap, this study aims to investigate the attitudes of English major teacher trainers towards technology integration in the teacher training programme, to explore how they apply technology in teaching, to identify their role in motivating teacher trainees using technology and to identify challenges they encounter. Qualitative data was collected from eight English major teacher trainers at a Hungarian university using a semi-structured interview guide. Findings from the thematic analysis reveal that teachers generally possess positive attitudes towards the use of technology integration, and that teachers make use of technological tools during lesson preparation, teaching sessions, and when providing feedback. The most prominent roles identified for teachers in motivating their teacher trainees were modelling and setting examples. Teachers encounter various challenges, including insufficient resources, outdated software, inadequate technology provision, personal financial investment, preparation and technical difficulties, rapid technological advancement and adaptation, internet-related issues, inconsistent availability of technology across classrooms, and a lack of technical and pedagogical training in implementing technology.

Keywords:

EFL, interview study, Hungarian tertiary education, teacher training programme, technology integration

1 Introduction

In recent years, technology has become essential in education, significantly enhancing student motivation and academic success (Al-Bataineh et al., 2016; Guaña-Moya et al., 2024; Valverde-Berrocoso et al., 2022; Wei, 2022). Integrating technology into teaching not only improves educational quality (Akram et al., 2021a) but also helps students develop skills, boosts motivation, and facilitates efficient knowledge acquisition (Chen et al., 2018). The COVID-19 pandemic emphasized technology's crucial role in maintaining learning when traditional classrooms were inaccessible (Thaheem et al., 2021), offering a flexible alternative for continued education (Akram et al., 2021b). Nagy (2021) highlighted that combining technology with traditional methods can enhance engagement when tailored to students' needs. Additionally, studies have shown that technology use in classrooms encourages inquiry, interaction, self-expression, and teaching efficiency (Baydas & Goktas, 2016)

Language teachers play a crucial role in implementing technology in education, as they significantly influence classroom practices and student learning (Çebi, 2018). Aşık et al. (2019) highlight that technology adoption in language teaching offers numerous educational benefits, positioning teachers as key agents in fostering effective learning experiences. The successful integration of technology relies on how effectively teachers use it to support teaching and learning (Bingimlas, 2009; Nikolopoulou & Gialamas, 2015). Research shows that technology enhances English as a Foreign Language (EFL) instruction efficiency, saves time, improves teaching quality (Nariyati et al., 2020), and enables teachers to actively engage students, improve outcomes, and adapt their teaching approaches to accommodate different learning needs. However, technology integration is not without challenges. Recent studies highlight that limited digital infrastructure, insufficient teacher training, and unstable internet connectivity often hinder effective implementation and reduce classroom efficiency (Stockwell & Wang, 2023). Moreover, teachers sometimes experience cognitive overload when navigating multiple digital tools or managing technical issues, which can detract from pedagogical focus and interaction quality (Crompton et al., 2022). Emerging technologies such as artificial intelligence have also raised concerns about ethical use, data privacy, and algorithmic bias, indicating that technological advancement must be approached critically and responsibly (Al-Zahrani, 2024). These findings suggest that while technology offers substantial pedagogical benefits, its effectiveness ultimately depends on adequate institutional support, informed teacher training, and ongoing ethical awareness.

While technology offers many educational advantages, its successful implementation often depends on teachers' perceptions and attitudes towards its use (Boonmoh et al., 2021). Studies have shown that teachers' views play a significant role in determining how technology is adopted in EFL classrooms (Boonmoh et al., 2021). Therefore, understanding teachers' attitudes and how they incorporate technology into their practices is crucial for effective integration.

Although much research has explored technology integration in EFL classrooms globally (e.g., Batubara, 2021; Bui, 2022; Chaaban & Ellili-Cherif, 2016), few studies focus on in-service teachers' perceptions at the university level in Hungary. This study addresses this gap by examining how English major university teachers, who also train future educators, use technology in their teaching at a Hungarian university. It explores how they engage and motivate teacher trainees and the challenges faced in technology integration. The findings from this study offer valuable insights to teacher trainers seeking to explore ways of integrating technology more effectively into their teaching practices. These results could also be informative for curriculum developers and educational institutions as they consider how to better support teacher training programmes by addressing the challenges related to technology integration. By reflecting on these findings, stakeholders may find ways to enhance the learning environment and provide more practical tools for teacher trainees to engage with technology in their future classrooms.

2 Literature Review

In recent years, the use of technology in education has gained significant attention, particularly in language teaching. Many studies have explored how both teachers and students perceive technology use, often finding positive attitudes across different countries and contexts (e.g., Fekete, 2021; Liang, 2021; Makhlouf & Bensafi, 2021). This review presents key findings from studies conducted in both international and Hungarian contexts, arranged thematically. The international studies will be discussed first, followed by those conducted in Hungary.

2.1 Studies from International Contexts

Teachers' attitudes are central to successfully integrating technology in language education. Positive beliefs encourage engagement with digital tools, whereas uncertainty or resistance can hinder adoption. Studies consistently highlight attitudes as a major predictor of technology use (Kessler, 2018; Liu & Szabo, 2019), and teacher education programmes that provide hands-on, reflective experiences strengthen readiness for digital teaching (Aşık et al., 2019). Research across contexts shows generally positive views, though attitudes vary by experience and training. Younger, less experienced teachers tend to rely more on technology, while older teachers often depend on subject expertise to compensate for limited digital skills (Huang et al., 2019). Similarly, age and prior computer training influence attitudes more than gender or qualifications (Noori, 2019). Recent findings reveal ongoing challenges: Chinese university teachers value ICT but often lack the competence for confident application (Moradi, 2025), and responses to innovations like ChatGPT range from enthusiasm to caution (Stan et al., 2025). In Indonesia, teachers remain positive yet face constraints

related to infrastructure and resources (Eryanyah & Erlina, 2023). In general, while positive attitudes form a foundation for technology adoption, effective implementation also requires institutional support, sufficient resources, and sustained digital training.

Beyond attitudes, teachers' actual classroom practices reveal the depth of technology integration. Effective use depends on both Technological Pedagogical Content Knowledge (TPACK) and supportive environments (Raygan & Moradkhani, 2020). However, even with positive attitudes, limited resources and digital skills often restrict classroom application, as seen among South Yemeni EFL teachers (Ahmed et al., 2020). Context strongly shapes practice: Thai teachers show uneven use across urban and rural schools (Boonmoh et al., 2021), Chinese university instructors rely mainly on teacher-centered delivery due to training and connectivity constraints (Liang, 2021), and Algerian teachers' adoption varies by age, qualification, and computer competence (Makhlouf & Bensafi, 2021). Vietnamese tertiary teachers demonstrate growing readiness to use technology (Thanh et al., 2023). The literature suggests a progression from surface-level uses, such as presentation tools, toward transformative, student-centred applications—provided teachers receive sufficient training and institutional support.

Teachers play a decisive role in how technology influences learner motivation and engagement. Motivation is central to student success, and teachers foster it by creating active and autonomous learning environments (Kember, 2015). In EFL settings, task-based computer-assisted language learning can significantly increase engagement when activities are well designed (Tavakoli et al., 2019), and digital tools can transform classrooms into more interactive and stimulating spaces (Alghasab, 2020). Teachers' pedagogical choices are key: confidence in using digital tools correlates with higher learner motivation (De Souza et al., 2021), while technology use can also promote autonomy and identity development (Wei, 2022). Motivation and performance are strongest when technology aligns with clear objectives and sound pedagogy (Negoescu & Mitrulescu, 2023). Conversely, inadequate training and technical problems can reduce motivation, demonstrating that technology alone does not ensure success (Stockwell & Wang, 2023). Teachers also note potential downsides—such as diminished interaction and ethical risks—highlighting the need for careful, pedagogically guided use (Syafrayani et al., 2024). The body of research suggests that teachers act as motivational mediators who determine whether technology enhances or hinders engagement; in teacher education, they should model its motivational use and train trainees to balance innovation with meaningful learning goals.

Although technology offers clear pedagogical benefits, multiple challenges continue to constrain its effective use. Limited resources, unstable internet access, and insufficient training hinder teachers' ability to integrate digital tools (Ahmed et al., 2020; Liang, 2021), while rural–urban disparities and weak institutional support further exacerbate inequities (Boonmoh et al., 2021; Raygan & Moradkhani, 2020). Psychological factors such as anxiety, low confidence, and limited experience can also discourage experimentation with new technologies (Aşık et al., 2019; Makhlouf & Bensafi, 2021).

Recent research adds emerging concerns: teachers often experience cognitive overload when navigating multiple tools, which can divert attention from pedagogy (Crompton et al., 2022), and ethical issues—such as data privacy and algorithmic bias—can erode trust in AI-based systems (Al-Zahrani, 2024). Moreover, excessive dependence on generative AI risks reducing learner autonomy and critical thinking if not carefully scaffolded (Szabó & Szoke, 2024). These studies reveal that the obstacles to technology integration are interrelated—technological, institutional, pedagogical, and ethical. Addressing them requires sustained infrastructure investment, targeted professional development, and explicit attention to digital ethics in teacher education programmes.

The reviewed literature reveals four interconnected themes: teachers' attitudes toward technology, their application of digital tools, their role in motivating learners, and the challenges they encounter. Overall, positive attitudes and digital readiness are essential for successful technology use; however, meaningful progress depends on teachers' ability to apply these tools purposefully and reflectively. Although technology has been shown to enhance student motivation and learning outcomes, its effectiveness ultimately relies on sound pedagogy, institutional support, and equitable access to resources. Persistent barriers—such as inadequate infrastructure, limited professional training, and ethical concerns—continue to influence teachers' experiences across contexts.

2.2 Studies From the Hungarian Context

Research on technology integration in Hungary has examined both student and teacher experiences, revealing generally positive attitudes but limited pedagogical application. While digital tools are widely valued, their use in higher education often remains functional rather than transformative.

Studies on Hungarian university students show that learners view technology as a motivational and supportive element in education. Nagy and Habók (2018) found that both language and non-language majors considered digital tools helpful for engagement and learning, with language majors using more interactive resources such as blogs, vlogs, and social media. However, online dictionaries and lexicons were the most frequently used tools, indicating that technology served mainly a supplementary role. Similarly, Fekete (2021) reported that English majors held positive attitudes but mostly used technology for recreation rather than academic purposes, highlighting a gap between enthusiasm and educational practice. Building on this, Habók et al. (2024) found that post-pandemic students showed more positive attitudes and higher academic use of digital tools. The authors noted that technology had become more integrated into learning, reflecting increased digital competence and motivation.

In contrast, studies on teachers reveal moderate technology use influenced by contextual and institutional factors. Magyar et al. (2020) found that teachers working

with students with special educational needs (SEN) relied mainly on pre-made digital materials—such as e-diaries, videos, and presentations—rather than creating their own, reflecting limited confidence in digital pedagogy. Fekete (2022) also found that most K–12 teachers had basic ICT skills but lacked innovative, learner-centred practices, emphasizing the need for continuous professional development. At the higher-education level, Nagy and Dringó-Horváth (2024) identified digital competence, perceived usefulness, and institutional support as key predictors of successful integration, while technostress and weak organizational backing hindered adoption. Similarly, Kótay-Nagy (2025) showed that although Hungarian EFL teachers valued technology-enhanced differentiated instruction (TEDI), they faced obstacles such as planning demands, limited infrastructure, and insufficient training.

Overall, Hungarian research presents a consistent pattern: students and teachers alike express positive attitudes toward technology, yet its pedagogical use remains cautious and surface-level. Students often employ digital tools for support or motivation rather than deep learning, while teachers tend to use technology for presentation and content delivery. Nonetheless, recent post-pandemic findings indicate growing digital maturity and normalization of technology in education. Strengthening digital competence, institutional support, and learner-centred pedagogy will be essential for achieving meaningful, sustainable integration in Hungary's higher-education context.

Despite the growing body of research in international and Hungarian contexts, little is known about how these dynamics unfold within Hungarian teacher education. To address this gap in the literature, the present study investigates (1) English teachers' attitudes toward technology integration, (2) their use of digital tools in teaching, (3) their role in motivating trainees through technology, and (4) the challenges they face. By exploring these dimensions, the study aims to provide context-specific insights into technology-enhanced EFL teacher training in Hungary.

3 Research Methods

The following section comprises the research design, featuring a detailed description of the data collection (including information about the participants, setting, instrument, and procedures) and the data analysis methods. Based on the literature review and in line with the aim of this study, the following research questions were formulated:

(1) What are the attitudes of English teachers towards technology integration in the teacher training programme?

(2) How do teachers apply technology in their teaching?

(3) What role do teachers play in motivating teacher trainees by using technology?

(4) What challenges do teachers encounter when applying technology to motivate teacher trainees?

3.1 Qualitative Design

The study employed a qualitative, exploratory approach to investigate teachers' use of technology within a Hungarian teacher training programme. One-on-one qualitative interviews were considered the most suitable method, as Dörnyei (2007) emphasized that qualitative research delves into individuals' subjective opinions, experiences, and feelings. Consequently, to gather participants' views, opinions, perceptions, and experiences, and thus address the research questions, semi-structured interviews were conducted with eight in-service English-major university teachers, who served as teacher trainers in the programme.

3.2 Participants and Setting

The study was conducted with English major teacher trainers at a leading university in Hungary during the spring semester of 2023. A combination of purposive and convenience sampling methods was employed. Initially, purposive sampling was used to identify and target a specific group of participants: English major teacher trainers involved in a teacher training programme. This group was chosen because their experiences and insights were particularly relevant to the research questions. Following this, convenience sampling was applied, which, according to Dörnyei (2007), typically yields willing participants—essential for obtaining a rich dataset. Emails were sent to the identified individuals inviting them to participate in the study. Interviews were conducted with those who responded positively and were available, ensuring that data collection was both feasible and aligned with the study's objectives. In terms of educational background, five participants hold PhD degrees, while the remaining three are PhD candidates. The study included a total of five female and three male participants. The number of participants in this study can be assumed to provide sufficient data, as the ideal range for qualitative research is typically six to ten participants (Dörnyei, 2007). To maintain their anonymity, pseudonyms were used. The participants' background data are summarized in Table 1 (next page).

3.3 The Instrument

The study employed a semi-structured interview guide to explore university teacher trainers' use of technology in Hungarian tertiary education. This format allows for flexible questioning without predefined response categories, encouraging participants to elaborate freely. The instrument was formulated based on the research questions, theories, existing literature, and expert judgment. Following Dörnyei's (2007) guidelines, the interview guide included an introduction, a few questions about the participants' background (gathering information about participants' age, job title, educational background, and years of teaching English in general and as part of the teacher training programme), questions related to technology use in the teacher training programme,

and a final closing question. The interview guide began with a brief message to the participants, inviting them to take part in the interview and assuring them of their anonymity, voluntary participation, and the confidentiality of interview data in accordance with ethical considerations (Dörnyei, 2007).

Table 1

The Participants

No.	Pseudonym	Age	Job title	Educational background	Years of teaching English in general	Years of teaching English in the Teacher Training Programme
1.	Paul	62	Associate Professor	PhD degree holder	Approx. 40 years	Approx. 30 years
2.	David	58	Senior lecturer	PhD degree holder	Approx. 30 years	Intermittent
3.	Fanni	42	Senior lecturer	PhD degree holder	Approx. 22 years	Approx. 4 years
4.	Laura	37	Senior lecturer	PhD degree holder	Approx. 15 years	Approx. 4 years
5.	Teca	36	Senior lecturer	PhD degree holder	Approx. 13 years	Approx. 2 years
6.	Flóra	33	Assistant lecturer	PhD candidate	Approx. 6 years	Approx. 2 years
7.	Hedi	37	Assistant lecturer	PhD candidate	Approx. 12 years	Approx. 2 years
8.	Adam	28	Part-time lecturer	PhD candidate	Approx. 6 years	Approx. 2 years

3.4 Instrument Validation and Data Analysis Procedures

The interview guide was designed, piloted, and refined throughout the interviews until data saturation was reached. There were multiple steps in the validation process, including rewording and reorganizing questions based on expert feedback. Two pilot interviews were conducted to ensure clarity and validity, leading to adjustments in the interview guide. Most adjustments were made following the two pilot interviews, primarily focusing on revising the wording through rearranging, removing, and expanding certain questions. The final interview guide was found to be effective in eliciting information related to the research questions, and no additional modifications were deemed necessary. The final version (See Appendix) reflects these refinements.

For data collection, emails were sent to university English-major teacher trainers, inviting them to participate in an interview study. The email outlined the research purpose, the voluntary nature of participation, the use of pseudonyms to ensure anonymity, data handling procedures, the absence of right or wrong answers, a request for honest opinions and personal experiences, the estimated duration of the interview, recording permissions, and the participants' right to stop the interview if they felt uncomfortable.

The interviews were conducted in May 2023 across eight sessions. Five sessions were face-to-face, and three were held online using MS Teams, chosen based on participants' preferences. Permission was given to record the sessions, and participants were informed that they could stop the recording at any time if they felt uncomfortable. In addition to the introductory questions, which included a biographical section (gathering information about participants' age and teaching experience), and questions related to attitudes towards the use of technology, as well as any training or professional development related to technology integration in their actual teaching, the piloted interview guide consisted of three sets of questions and corresponding sub-questions. The interviews lasted approximately 30–45 minutes.

Among the eight teachers, five are native Hungarian speakers, one is a native German speaker, one is a native English speaker, and one speaks Ukrainian as their first language. Due to the researcher's lack of knowledge in non-English languages above, English was the language used for communication and conducting the interviews. After each interview, the recordings were carefully listened to and the participants' responses were analysed, following Dornyei's (2007) guidelines concerning two key features: (a) the flow of the conversation, and (b) its richness in detail. Following the interviews, the collected data underwent thematic content analysis to identify and report patterns or themes (Braun & Clarke, 2006). The data analysis followed Creswell's (2009) guide for step-by-step analysis.

4 Results

This section presents the key themes that emerged from the data, incorporating participants' direct quotations to allow their voices to be heard. As Aldridge and Levine (2001, p. 102) point out, carefully chosen excerpts from participants can often convey the depth and nuance of responses more effectively than other narrative methods. The section is organized according to the four research questions.

4.1 Attitudes of English Teachers towards Technology Integration in the Teacher Training Programme

Teachers were initially asked about their attitudes towards technology, their appreciation of its use, and any training or professional development they have received on incorporating technology in teaching. In terms of *attitudes towards using technology*,

seven out of eight teachers expressed positive attitudes, emphasizing the importance of integrating technology into teaching programmes. Laura, Flóra, Hedi, and Adam actively enjoy and frequently use technology, while Fanni was more reserved, stating, "I do not say I like it, but I use it because I know students like it, and I know that I have to, and so I do."

Regarding its positive aspects, teachers appreciated technology for facilitating interaction, providing storage for teaching materials and student work, offering an organizational structure for managing lessons and classroom activities, enabling connections among teachers, students, and colleagues, and granting access to diverse information sources. Paul stated that, "it makes my life a little easier in terms of having a blueprint that I can use again," while Flóra described technology as a "treasure box" for teachers. Two out of eight teachers participated in formal training. For instance, Laura attended a technology training organized by the Psychology Department nine years ago. Fanni shared her experience, stating that, "the university offers free self-paced courses. I took some of those, which helped me learn how to use Wooclap, for example. That is something I recently learned." Other teachers mentioned that not all of their colleagues had received formal training before integrating technology into their teaching.

Table 2

Emerging Themes: Teachers' Attitudes Towards Technology Integration

Emerging themes		
Teachers' attitudes towards technology integration	Positive aspects of technology use	Experience with technical training
• positive • neutral	• facilitates interaction • provides storage • offers organizational structure • grants access to various information sources	• two teachers (Yes) • six teachers (No)

4.2 Teachers' Use of Technology in Their Teaching

The emerging themes derived from the interviews, which describe teachers' use of technology in their teaching, are presented and supported by evidence in table form. Subsequently, an in-depth explanation of these themes is provided.

Table 3

Emerging Themes: Teachers' Use of Technology in Their Teaching

Emerging themes		
Teachers' use of technology in teaching	Technological tools used by teachers	Technological tools available in the classrooms
• lesson preparation • utilization of technology during the lessons • provision of feedback • identification of students' needs during the course • prioritization of students' opinions • evaluation of students' performance	• communication and collaboration tools (e.g., zoom, teams, Facebook group) • learning management system (e.g., Moodle, Canvas) • presentation tools (e.g., PPTs, Prezi, Mentimeter, projector) • digital whiteboards (e.g., interactive whiteboard, smartboard, Jamboard) • game-based learning platforms (e.g., Kahoot, Bamboozle) • general technology tools (e.g., the internet, computer, laptop) • free online tools from google (e.g., Google Form, Google Document)	• limited availability of technological tools • absence of technological tools in all classrooms • reliance on the classroom setup • inclusion of built-in projector, smart board, and computer in some classrooms

It was observed that teachers utilize technological tools for lesson preparation, during teaching, and for providing feedback. However, their predominant use of technological tools occurs during their actual lessons. When it comes to preparing lessons, they do not extensively rely on technological tools. Flóra's perspective further supports this observation, as she stated that, "...it's funny because actually when it comes to planning, I prefer the old-fashioned way or my little notebook. And you know, writing everything down. So I don't really have my plans on my computer..."

With regard to the availability of technological tools in the classroom, it was noted that the presence of such tools varies depending on the classroom. While Fanni mentioned having access to a wide range of technological tools in her classroom, other teachers expressed that their classrooms were not adequately equipped with such tools. Consequently, teachers are required to bring their personal devices if they intended to use technological tools for teaching purposes. David shared his experience, stating the following:

> Unfortunately, this semester I had a room which had nothing in it except, you know, a chalkboard, and I think a whiteboard as well. And that's not good. The

> room was small, not very comfortable, and if I wanted to use any online tools, I had to bring in my own laptop and a projector. Moreover, there wasn't even a screen to project it onto, so I had to find one wall on which I could project it onto. That's not ideal. (David)

Despite limited resources, teachers use various technological tools, such as interactive whiteboards, Zoom, Mentimeter, Kahoot, Microsoft Teams, Moodle, Jamboard, Bamboozle, and Google tools (e.g., Forms, Docs, etc.). They also use platforms like Canvas, Prezi, Padlet, and Quizlet, as well as tools like QR codes, projectors, and smart boards. Laura consistently uses Canvas for student participation, homework submission, presentations, microteaching, assignment uploads, and feedback. As she stated, "I always use Canvas… their participation, their homework, their presentation, microteaching, uploading assignments, and basically they get feedback from me through Canvas as well." Fanni similarly emphasized using Canvas:

> My courses are mostly run in Canvas, and with all the evaluations, at the beginning, they have the course outline, and there are modules according to the course outline, and within the modules, they have millions of materials available. (Fanni)

4.3 Teachers' Role in Motivating Teacher Trainees through Technology

The following emerging themes were identified in relation to the teachers' role in motivating teacher trainees.

Table 4

Emerging Themes: Teachers' Role in Motivating Teacher Trainees by Using Technology

Emerging themes		
Teachers' role in motivating students	Teachers' tailored use of technology	Strategies to support students in using technology outside the classrooms
• the potential surpassing of teachers' IT skills by students • restricting technology use until foundational understanding and teaching methods are established • accommodation to shorter attention spans	• no, but using suitable teaching approach based on classroom observation and individual needs	• modelling • provision of opportunities for students to generate and upload reading notes • assigning homework that requires the use of technological tools • having students use some kind of technological devices and Quizlet sets • assigning students to use Kahoot or bamboozle games for homework • asking students to watch an episode of a series on Netflix

Teachers have diverse views on how to motivate trainees through technology. David believes that teacher trainees require less motivation due to their advanced technological knowledge. Instead, he focuses on modelling organizational skills and online communication. David's approach reflects the idea that advanced trainees already have strong technological skills and therefore, benefit more from learning how to manage and use technology effectively in teaching. This view suggests that teacher trainers should guide trainees regarding broader teaching competencies, rather than focusing solely on technology use. Fanni prefers to initially guide students in teaching without technology. She believes it is important to build a solid foundation before introducing technological tools. This involves restricting or controlling the use of technology until students understand how to teach or approach a topic without it to prevent an over-reliance on technology. Fanni wants students to first master the content or skill, so that they can later use technology purposefully and effectively. By doing so, she ensures that technology enhances, rather than distracts from, the teaching process. This approach stresses the importance of a strong pedagogical foundation before integrating technological tools. Flóra addresses the challenge of shorter attention spans and suggests that technology can help engage students. However, she warns that it should not reduce lessons to mere entertainment. Technology should support educational goals and not overshadow them. Flóra's view acknowledges that technology can capture attention, but it must be used thoughtfully to maintain the integrity of the learning experience. Her approach focuses on balancing engagement with learning objectives, ensuring that technology adds value to the lesson.

Regarding tailored technology use, most teachers do not customize their approach for different trainees. While they do pay attention to trainees' needs, they rarely use technology in this aspect. Paul emphasizes differentiation based on classroom observations, using tools that aid illustration when needed. Laura also stated that,

> The key to motivation is giving them the freedom of choice. I do not impose tools but allow them to choose how they want to approach the material and which tools to use. We always have a discussion afterward to identify what aspects helped motivate them. (Laura)

Teachers also encourage technology use outside the classroom. Flóra integrates tools like Quizlet, Kahoot, and Bamboozle into homework assignments to foster autonomous learning by requiring students to engage with the material independently, outside the classroom. According to Sari et al. (2020), smartphone-based applications such as Kahoot and Quizlet are particularly effective in encouraging students to work independently. These applications allow students to review and interact with content on their own, which builds autonomy. Additionally, the interactive, game-based features of tools such as Kahoot and Quizlet encourage students to take responsibility for their learning and progress at their own pace, thus enhancing their independent learning skills.

Paul emphasizes modelling by actively participating in writing and feedback tasks, stating, "I think a very important part of encouraging without being didactic is to model." He designs tasks on Moodle in which trainees submit one writing piece and provide feedback on another. Paul often leads by example, being the first to respond and expressing gratitude to participants, which encourages others to engage.

4.4 Challenges Encountered by Teachers when Applying Technology to Motivate Teacher Trainees

Interviewees highlighted several challenges they face when using technology in their actual teaching, including insufficient resources and outdated software, inadequate technology provision, personal financial investment, preparation and technical challenges, as well as rapid technological advancement and adaptation.

One of the challenges to effective technology use in teacher education is inadequate resources and staffing. Existing hardware, including new devices, often encounters technical issues and lacks necessary support. Additionally, limited autonomy in updating or using new tools is present due to centralized control by the IT centre. Paul expressed his perspective on the matter in the quote below:

> Sadly in teacher education, we're under-resourced, understaffed, and, you know, the hardware we have is old. Even the new things don't work well. For example, we recently received a brand-new interactive whiteboard, but the cable doesn't work, and there's nobody available to fix it. No technician appears and says, "No problem, I'll fix it in 5 minutes." We're also disempowered because sometimes I want to update or make changes on my computer, but everything is centralized. The IT centre controls our machines, so I'm not in a position to respond quickly or, you know… (Paul)

Integrating technology into teaching presents several challenges, such as unreliable internet connectivity, uneven distribution of technological resources, and limited institutional support, often requiring teachers to purchase their own equipment. The rapid pace of technological advancements demands continuous learning and adaptation. While initial preparation can be time-consuming, it becomes more efficient over time, though technical issues like internet problems can still disrupt teaching. All interviewees stressed the importance of having a backup plan. Additionally, they highlighted that it is crucial for educators to balance technology use to prevent over-reliance and ensure it remains a learning tool rather than a distraction. Despite these challenges, teachers remain dedicated, often using personal resources and platforms like Moodle, Teams, or Canvas for sharing materials, communication, homework, and feedback. This commitment demonstrates their efforts to create an effective learning environment.

Table 5

Emerging Themes: Challenges Encountered by Teachers when Applying Technology

Emerging themes			
Challenges faced by teachers	Staying up-to-date with new technologies	Technology impacts on the future of education	Advice given by teachers
• being under resourced • being understaffed • unreliable internet connectivity • necessity of using personal technological tools (e.g., projector, JBL speaker) • high-cost projectors • expensive personal investment in Internet access without reimbursement • initial challenges in navigating processes and procedures • technical issues • manual input of points and individual feedback administration to students on Canvas • time-consuming lesson preparation • information overload during lesson planning • increased demand for critical and thoughtful engagement in tasks	• limited exploration of new technologies, relying on hearsay from colleagues • inability to stay up-to-date with technological tools • active participation in departmental training sessions • learning from students • learning through social media • talking to colleagues • attending conferences • following education related Facebook pages (e.g., EDUTOPIA)	• technology's inability to fully replace trainers due to limitations in real-time interaction and handling crucial aspects • observable impact of technology on certain facets of education • ubiquitous availability of information • diminished student motivation to learn due to the influence of technology • rapid pace of technological change • inevitability of technology's presence in modern times • anticipation of technology becoming an integral part of everyday life • preference of phone usage over traditional notetaking	• don't be afraid • do what you're comfortable with • don't feel pressured • talk to your students • be patient and use only what you're comfortable with. • try out technology before using it in the classroom, or practice with a trusted group. • be authentic • feel free to experiment. • don't take it too seriously • find what works for you • have an open discussion in which students can contribute • don't be afraid to ask your students for assistance

To stay updated with new technologies, participants rely on several strategies. They often learn from colleagues' recommendations and discussions, which provide inspiration and information on ongoing developments. Teacher trainees, in particular, are seen as a valuable source of information, as they often introduce new websites and technologies. Participants also use Facebook groups to explore tools used by other teachers and follow education-related pages such as EDUTOPIA. Moreover, attending conferences and department training sessions further helps them to stay current with emerging technologies.

Regarding the impact of technology on the future of education, the participants acknowledged that technology is already influencing education and that adaptation is necessary. However, they emphasized that classrooms and teachers remain essential, especially in language teaching, which involves communication beyond mere knowledge transfer. While recognizing the uncertainty surrounding the full extent of technology's impact, they advocate for minimizing its negative effects and using it effectively. Paul believes that technology cannot be restricted once introduced and that teaching methods should adapt accordingly. He argues that technology cannot replace the human qualities of trainers who respond intuitively to non-verbal cues, especially in language learning. Other teachers noted the rapid technological changes in education, such as the shift from paper note-taking to digital devices. They recognize both the benefits and challenges of integrating technology into teaching.

Artificial intelligence and the ubiquitous availability of information have raised concerns about students' motivation to learn and the potential impact on general intelligence. To address this, teachers underscored a growing need to focus on logical reasoning, philosophy, research skills, critical thinking, and evaluating information. As Fanni explained, "I need to focus more on developing students' logical thinking, philosophy, research skills, and the ability to evaluate information sources critically. I need to teach them more thinking skills and research skills."

The interviewed teachers advised that technology should be viewed as a tool and used purposefully, with efforts taken to strike a balance between benefits, risks, and challenges. They recommend being authentic and finding what works best for each individual, encouraging experimentation without fear. In addition, they highlighted that teachers should not hesitate to ask for help from colleagues or tech-savvy students and are encouraged to involve students in feedback about technology's effectiveness. Traditional methods, such as the use of pen and paper, were also viewed as valid options, as students may sometimes appreciate a break from technology. Practicing beforehand, being patient, and only using technology teachers are comfortable with was also mentioned as a way to help ensure professionalism and a more seamless integration process.

David noted that technology has expanded educational possibilities by providing quick access to vast amounts of information. However, he emphasized that teachers play

a crucial role in guiding students to use technology effectively and in developing higher-order thinking skills, which are essential across all areas of learning. He highlighted technology's main advantage as providing access to up-to-date information, but acknowledged the challenge of filtering this information. David argued that education should go beyond knowledge transmission, as the abundance of information makes that role increasingly redundant. Instead, he believes that educators should focus on helping students apply knowledge effectively in learning, communication, and across various subject areas.

5 Discussion

This section discusses the findings in light of the four research questions, integrating insights from both the literature review and study results.

5.1 Attitudes of English Teachers Towards Technology Integration in the Teacher Training Programme

The study revealed that the majority of the English teacher trainers showed positive attitudes towards technology integration, which aligns with the findings of Albirini (2006), and other scholars who have emphasized the significance of teachers' positive attitudes in the effective adoption of technology. The fact that seven out of eight participants viewed technology favourably suggests that these teachers recognize the benefits of technology in enhancing teaching and learning experiences. This aligns with Makhlouf and Bensafi (2021), who noted that positive attitudes toward technology are crucial for effective integration.

5.2 Teachers' Use of Technology in Their Practice

The study found that teachers primarily used technology during lessons rather than in lesson preparation, with a variety of tools such as interactive whiteboards, Zoom, and Canvas being utilized. This suggests that for these teachers, technology serves as a practical resource to facilitate teaching activities rather than being a core element of lesson planning. The use of multiple digital platforms, such as Moodle and game-based learning tools, reflects a willingness to engage students through diverse technological methods, which aligns with literature indicating that technology can enhance teaching efficiency and student engagement (Nariyati et al., 2020).

Interestingly, some teachers preferred traditional methods, such as handwritten notes for lesson preparation, suggesting that while technology is embraced for instructional purposes, some educators still rely on conventional approaches for planning. Moreover, the inconsistency in technological resources across classrooms, as reported by the

teachers, highlights a perceived gap between their willingness to use technology and the availability of resources. This challenge was also identified by Ahmed et al. (2020) as a barrier to technology implementation in EFL classrooms. While the university has made efforts to provide tools such as personal computers, interactive whiteboards, internet, projectors, and training programs, the actual availability and functionality of these resources can vary. Some classrooms are well-equipped, while others are not. Additionally, issues related to maintenance and technical support can occasionally hinder the effective use of technology. As Fanni shared,

> It's kind of sad, but it really does depend on where my lessons are, how much I use ICT tools. It's not really a matter of me wanting to use them or not, but whether I have access to tools or not. (Fanni)

This variability in resources and support may contribute to teachers' hesitancy or difficulties in fully integrating technology into their teaching.

5.3 Teachers' Role in Motivating Teacher Trainees through Technology

The study highlighted that teachers play a vital role in modelling technology use to motivate teacher trainees, but they do not necessarily tailor their technology use to meet the trainees' diverse needs. This is consistent with literature emphasizing the importance of teachers serving as facilitators and role models in technology integration (Aşık et al., 2019; Çebi, 2018). By demonstrating how to use technological tools effectively, teachers can inspire trainees to incorporate similar methods in their future classrooms, supporting the notion that teacher attitudes and behaviours are critical in shaping trainees' perspectives on technology integration.

However, the study also found that some teachers are cautious about over-reliance on technology, emphasizing that trainees should first understand traditional teaching methods before integrating digital tools. This perspective aligns with the findings by Boonmoh et al. (2021), which reinforce the importance of balancing technological and traditional teaching approaches. Therefore, the role of teachers in motivating trainees involves not only demonstrating the potential of technology but also guiding trainees toward developing a well-rounded understanding of teaching with and without technology.

5.4 Challenges Encountered by Teachers when Applying Technology to Motivate Teacher Trainees

The challenges identified in the present study, such as insufficient resources, outdated software, unreliable internet connectivity, and the need for personal financial investment, mirror the barriers highlighted by Ahmed et al. (2020) and Raygan and Moradkhani (2020). These limitations hinder teachers' ability to effectively integrate technology, despite their positive attitudes towards its use. For instance, reliance on personal devices, especially in

cases of varying availability of classroom technology, reflects findings from the literature, suggesting that inconsistent access to institutional resources can limit the effective integration of technology in educational settings (Aşık et al., 2019; Boonmoh et al., 2021).

Moreover, the rapid pace of technological advancements presents an ongoing challenge for teachers, requiring them to constantly update their skills and adapt to new tools, as reflected in the literature review. This situation highlights the need for continuous professional development and training, which Aşık et al. (2019) and Huang et al. (2019) emphasize as essential for preparing teachers to effectively integrate technology into their teaching practices. The study also highlighted the importance of having a "Plan B" to address potential technical issues, demonstrating that while teachers are willing to use technology, they remain cautious and prepared for disruptions. This finding aligns with the idea that teachers need to be adaptable and resourceful in handling technology-related challenges (Bingimlas, 2009; Nikolopoulou & Gialamas, 2015).

6 Conclusion

This study explored English major teacher trainers' attitudes towards technology integration, how they apply technology in their teaching practices, their role in motivating teacher trainees, and the challenges they face at a Hungarian university. Through qualitative interviews with eight English-major teacher trainers, the thematic analysis revealed that while these educators generally have positive attitudes toward technology integration, they face challenges such as inadequate resources, outdated software, unreliable internet connectivity, and a lack of technical and pedagogical training.

The findings showed that teachers use technology mainly during lessons but also for lesson preparation and providing feedback. In terms of motivating teacher trainees, the most prominent roles identified for teacher trainers included modelling and setting examples, particularly in areas such as time management, organisation, and clear communication. One trainer noted that these aspects are long-standing responsibilities of teachers and remain especially relevant when using online tools. While trainees today are generally familiar with digital platforms and may not require extensive motivation to use them, the modelling of professional behaviours—such as meeting deadlines and structuring tasks effectively—was viewed as essential to support their development as future educators. While teachers employ various technological tools in their practice, they encounter challenges such as insufficient resources and outdated software, inadequate provision of technology, personal financial investment, preparation and technical difficulties, rapid technological advancement and adaptation, internet-related issues, inconsistent availability of technological equipment across classrooms, and a lack of technical and pedagogical training in implementing technology.

The study's findings align with existing literature, confirming that positive teacher attitudes are essential for successful technology integration (Albirini, 2006; Makhlouf

& Bensafi, 2021). Nevertheless, practical barriers such as limited resources, lack of training, and rapid technological advancements hinder effective integration in teacher training programmes, underscoring a need for enhanced institutional support, access to updated technology, and ongoing professional development to improve technology use in English language teaching. While the university makes efforts to provide technological resources and training, ongoing investment in updated infrastructure—such as reliable internet, up-to-date software, and consistent technical support—can further enhance the effective integration of technology into classrooms. In some cases, insufficient access to functional tools and maintenance may create obstacles for teacher trainers. Ensuring smooth and reliable access to these resources could help reduce these issues, allowing teacher trainers to concentrate more on essential aspects of their work, such as teaching methodology and task design. These findings highlight the importance of continued institutional support, improved access to up-to-date technology, and ongoing professional development to support the meaningful integration of digital tools in English language teaching. It would be beneficial for educational institutions to invest further in modern infrastructure so that teacher trainers are better equipped to integrate technology into their teaching practices and serve as effective role models for trainees.

This study has certain limitations. It involved only EFL teacher trainers, excluding other stakeholders such as policymakers, curriculum developers, and EFL teacher trainees. Future research could involve a broader range of participants to gain a more comprehensive understanding of technology integration in teacher training. Although the study had eight participants, which is within the recommended range for qualitative research (Dörnyei, 2007), expanding the participant pool could provide more diverse perspectives.

Additionally, future studies could adopt a mixed-methods approach, combining quantitative surveys with qualitative interviews to enhance data robustness, as suggested by Creswell (2009). Research could also focus on how specific technological tools impact teaching practices, student engagement, and learning outcomes to identify which tools are most effective for teacher training programmes. In conclusion, this study offers valuable insights into technology integration in EFL teacher training. Addressing the identified challenges can improve technology adoption, making it more effective and beneficial for both teacher trainers and trainees.

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Appendix

Interview guide

Good [morning/afternoon], Professor!

My name is [Name], and I am conducting research on teachers' use of technology in EFL classrooms. I am particularly interested in the teacher training programme. This interview will focus on exploring how a teacher trainer applies technology in actual teaching practices during the programme, discovering the role a teacher trainer plays in motivating teacher trainees through technology, and identifying the challenges a teacher trainer faces when using technology to motivate trainees. The interview is expected to last approximately 30-50 minutes and will be recorded. Your participation is anonymous and voluntary. If, at any point during the interview, you feel uncomfortable, please let me know, and we can temporarily or permanently stop the recording. Your unique experiences and perspectives will be invaluable to this study.

Introductory questions:

1. Could you please tell me about yourself and your role in this school?
2. How old are you?
3. How long have you been teaching English?
4. In which year of teacher training do you teach?
5. How long have you been teaching in teacher training?
6. Do you like using technology? If yes, why? If not, why?
7. What do you like about using technology?
8. Why do you support or oppose technology integration in your teacher training programme?
9. Why or why not do you think that it is important to integrate technology in the teacher training programme?
10. Do you believe that technology can assist your trainees in language learning? If yes, how do you think it can do so?
11. Why do (not) you expect students to use technology for their language learning?
12. Why do you consider it (un) necessary for your students to use technology for their language learning?
13. How can you motivate your students in language learning using technology?
14. What kind of training or professional development have you received to integrate technology in their teaching, and how it has impacted your teaching

practices?

RQ1: How does a teacher apply technology in their teaching?

1. What do you use technology for in teaching?
2. Do you apply technology in designing your lesson plan? Why or why not?
3. What technological tools do you use in designing lesson plans?
4. Do you apply technology while teaching? Why or why not?
5. What technological tools are available for use in your classroom?
6. What technological tools do you use while teaching?
7. Do you apply technology in providing feedback? Why or why not?
8. What technological tools do you use in providing feedback?
9. How do you integrate technology into your lesson plans and curriculum?
10. How do you use technological tools to initiate motivation in your trainees?
11. How do you use technological tools to maintain motivation in your trainees?

RQ2: What role does a teacher play in motivating teacher trainees by using technology?

1. What technological tools do you use to motivate your trainees?
2. How do you use technology to engage and motivate teacher trainees in your teacher training programme?
3. How do you tailor your use of technology to meet the needs of different teacher trainees in your teacher training programme?
4. How do you think a teacher can motivate students' language learning by using technology? If so, why? If not, why?
5. What strategies do you use to encourage teacher trainees to use technology outside of the classroom to support their language learning?

RQ3: Which different challenges does a teacher encounter when applying technology to motivate teacher trainees?

1. What challenges do you encounter when using technology?
2. What challenges do you encounter in using technology for creating lesson plan?
3. What challenges do you encounter in using technology while teaching?

4. What challenges do you encounter in using technology for giving feedback?

5. How do you overcome these challenges?

6. How do you stay up to date with new technologies and teaching methodologies?

7. How do you see technology impacting the future of education, and how do you plan to adapt your teaching practices accordingly?

8. What advice would you give to other teacher trainers who are encountering challenges when using technology to motivate their trainees?

9. Is there anything you would like to add?

Thank you very much for your time and kind help.

4

EFL Learning Experiences in Ecuador: Teacher Perspectives on Their Role in Student Motivation

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Abstract

This qualitative study explores the EFL learning experiences of non-English major university students in Ecuador from the perspectives of their English teachers. Addressing gaps in second language (L2) motivation research, particularly regarding the teacher's influence on the learning experience (Csizér & Kálmán, 2019), this study examines how instructors perceive their roles in motivating students to learn English. Data were collected through semi-structured interviews and focus groups with ten instructors from a public Ecuadorian university. The findings reveal limited intrinsic motivation among students, the idealization of native speakers, and the significant impact of social and contextual factors on learners' motivation and behavior. The findings reveal limited intrinsic motivation among students, the idealization of native speakers, and powerful social and contextual forces shaping learners' motivation and behavior. Yet, even under these constraints, instructors' attitudes and behaviors, together with their function as attainable language models in the local context, emerged as powerful motivational catalysts, a dynamic often underestimated in traditional pedagogical approaches. Drawing on these insights, the study highlights the value of pedagogical approaches that leverage the interpersonal dimension of teaching, where instructors' learning trajectories, professional presence, and dispositions such as empathy and humor actively reframe English as both attainable and worthwhile for learners. Viewed holistically, teachers' relational, affective, and contextual awareness constitute a salient force shaping students' EFL learning experiences beyond the formal act of teaching.

Keywords:
EFL learning experiences, Ecuadorian non-English major university students, English teachers' perspectives, Teachers' roles in motivating students

1 Introduction

In the field of education, motivation is frequently cited by teachers and students as a key determinant of learning success or failure, with particular emphasis on the context of learning a foreign language (FL) or a second language (L2) (Guilloteaux & Dörnyei, 2008). To operationalize this construct, we anchor our research in Dörnyei and Ottó's (1998) definition:

> Motivation can be defined as the dynamically changing cumulative arousal in a person that, once initiated, directs, coordinates, amplifies, terminates and evaluates the cognitive and motor processes whereby initial wishes and desires are selected, prioritised, operationalised and (successfully or unsuccessfully) acted out. (p. 65)

This definition of motivation was chosen for the present study because it captures the dynamic and process-oriented nature of language learning motivation, which aligns closely with the aims and context of this research. Dörnyei and Ottó's (1998) conceptualization views motivation as a continuous process that evolves through initiation, maintenance, and regulation phases—each influenced by contextual and interpersonal factors. This dynamic perspective is particularly relevant to the Ecuadorian EFL context, where teachers play a central role in sustaining learners' engagement within constrained institutional settings. By emphasizing how cognitive and emotional impulses are activated and shaped in real time, this definition enables a nuanced examination of how teachers stimulate, guide, and sustain their students' motivation in classroom interactions. Moreover, it complements the framework of the L2 Motivational Self System (Dörnyei, 2005) applied in this study, as both highlight motivation not as a static trait but as an evolving process that links vision, experience, and action. Therefore, adopting Dörnyei and Ottó's (1998) definition provides a coherent theoretical foundation to explore how EFL teachers in Ecuador perceive their influence on learners' motivational trajectories and language learning behaviors. Motivation in language learning is essentially about learners' choices and the effort they put into sustaining them (Dörnyei, 2001). Over the past five decades, research in second language acquisition (SLA) has focused on identifying the motivational drivers that lead to and maintain effort in L2 learning (Al-Hoorie, 2017). This study specifically examines two constructs within Dörnyei's L2 Motivational Self System (L2MSS)—the ideal L2 self and the L2 learning experience—to understand their influence on language learning motivation.

Key gaps in L2 motivation research, as highlighted by Csizér and Kálmán (2019), include the role of teachers in shaping the L2 learning experience and the L2 learning experience itself. Notably, there is a scarcity of empirical studies on English language learning motivation in Ecuador, a gap this study aims to address. The focus of the present research is to gain an in-depth understanding of teachers' roles in motivating non-English major university students in Ecuador through a qualitative research approach.

This article explores teachers' perceptions to establish a foundational understanding of the EFL learning process. The goal is not to overshadow students' voices but to explore teachers' views in order to increase the validity of the investigation. This research is intended to be beneficial for educators, researchers, policymakers, and EFL students by providing an in-depth view of the teacher's role in shaping the EFL learning experience for Ecuadorian non-English major students, particularly in fostering motivation and addressing learning challenges.

2 Literature review

Gardner and Lambert's (1959) socio-educational model in SLA motivation research distinguished between instrumental and integrative motivations. Instrumental motivation refers to learning a language for practical reasons, such as career advancement or academic requirements. In contrast, integrative motivation stems from a genuine interest in another culture or language, aiming at cultural integration. Currently, the instrumental role of English is viewed as an essential driver of economic prosperity and global development, as it provides access to international trade, science, technology, and innovation. Additionally, English proficiency is considered a strategic factor for countries to integrate into the global economy and strengthen international relations in an interconnected world. Research highlights that EFL students with strong instrumental motivation often pursue English proficiency to achieve specific goals, such as passing exams, securing better employment, earning higher salaries, or accessing educational opportunities (Aspuri et al., 2019).

Despite being foundational, the concept of integrative motivation has been criticized for its limited applicability in EFL contexts and the evolving role of English globally (Csizér & Kormos, 2009; Islam et al., 2013; Kormos & Csizér, 2008; Lamb, 2012). Addressing these criticisms, Csizér and Dörnyei (2005) broadened the notion of integrativeness, emphasizing internal self-identification over external cultural assimilation. This shift paved the way for Dörnyei's L2MSS (2005, 2009), which redefined motivation in SLA. According to Dörnyei, the L2MSS is a comprehensive framework encompassing various psycho-linguistic factors that impact motivation, which were previously considered as separate or overlapping concepts. Dörnyei's (2005) model consists of three primary components: the ideal L2 self, the ought-to L2 self, and the L2 learning experience. According to Dörnyei (2005), the L2 Motivational Self System comprises three interrelated components. The ideal L2 self represents the individual's vision of the competent second-language user they aspire to become. The ought-to L2 self reflects the external expectations and obligations perceived by the learner, including the desire to avoid negative outcomes or disapproval from others. Finally, the L2 learning experience encompasses situation-specific motives derived from immediate learning contexts, such as the influence of the teacher, the curriculum, the peer group, and previous experiences of success in the classroom.

The inconsistent manifestation of the ought-to L2 self across different sociocultural EFL contexts (Kormos & Csizér, 2008) presents significant challenges for its reliable application. While some studies have found weak but significant correlations between this construct and motivated language learning behavior in contexts such as Japan (Taguchi et al., 2009) and Spain (Amengual, 2018), research in Ecuador (Andrade-Molina et al., 2022), Hungary (Csizér & Lukács, 2010; Kormos & Csizér, 2008), and Chile (Kormos et al., 2011) revealed no significant correlation. Furthermore, Dörnyei and Chan (2013) suggest that environmental pressures merely outline learners' motivational mindset without substantially influencing their motivated learning behavior. Given these cross-cultural inconsistencies and the specific aims of the present study, the ought-to L2 self construct was excluded from the investigation. Lamb (2012) commended Dörnyei's L2MSS for adapting Gardner's concepts to contemporary global English learning scenarios. Taguchi et al. (2009) confirmed the cross-cultural validity of the L2MSS, supporting its application in diverse educational contexts.

Studies consistently indicate that the ideal L2 self and the L2 learning experience show stronger correlations with motivated language learning behavior than instrumental or integrative motives (Csizér & Kormos, 2009; Kormos & Csizér, 2008; Taguchi, Magid, & Papi, 2009; Boo, Dörnyei, & Ryan, 2015; Andrade-Molina et al., 2022). However, Boo et al. (2015) noted a research gap, with approximately 67% of studies between 2005–2014 not emphasizing the role of teachers or learning experiences in influencing motivation. This observation underscores the necessity of further research focused on these aspects, particularly considering the teacher's perspective, to formulate effective strategies for motivating EFL learners.

2.1 The L2 learning experience

The inclusion of the L2MSS into L2 motivation research has had a major impact on the research agenda in the field. In recent years, attention has mainly focused on the Ideal L2 Self and Ought-to L2 Self dimensions. However, Csizér and Kálmán (2019) argued that the L2 learning experience has been under-researched due to its intangible nature and the emphasis placed on possible selves in empirical studies. They emphasized the need for further investigation into the L2 learning experience, reconceptualizing it as the perception of internal and external stimuli encountered during language learning, shaped by learners' past experiences:

The L2 Learning Experience is the perception of internal cognitive and emotional processes, as well as external stimuli and circumstances that the learner experiences during the course of learning a foreign language in and outside the classroom; it is shaped and determined by attributions stemming from past L2 learning and L2 use experiences that continually evolve after the actual language learning and language

use has taken place. (Csizér & Kálmán, 2019, p. 16)

Despite the primary focus on the ideal and ought-to L2 selves, research consistently demonstrates that the L2 learning experience is a significant predictor of motivated behavior and achievement. For instance, a large-scale survey in China (N > 10,000) conducted by You and Dörnyei (2016) found that attitudes toward the L2 learning experience had the strongest connection with language motivation. Even when dividing the sample by gender, visionary skills, and learning context, the impact of the L2 learning experience remained significantly higher than that of the ideal L2 self. In EFL contexts, learners' motivation appears to be closely linked to their evaluation of the L2 learning experience.

2.2 Trends and developments in L2 motivation research

Recent developments in SLA research have highlighted new trends. Authors like Lamb (2012) and Kormos and Kiddle (2013) have investigated the influence of social, cultural, and linguistic contexts on the motivation of disadvantaged students. This trend aligns with the growing focus on socio-cultural contexts, with scholars emphasizing the value of approaches like English for Specific Purposes (ESP), especially in university EFL settings (Swales & Feak, 2004). Basturkmen (2010) argued that ESP addresses the language demands of EFL students in their academic or professional fields, making English more directly relevant to their future careers. This relevance allows students to see the immediate benefits of acquiring English proficiency, which in turn fosters greater motivation to actively engage with the language.

Lamb (2017) reviewed the state of L2 motivation research and noted a surge in studies related to the pedagogical aspects of motivation. Another emerging trend is the revisiting of Motivational Strategies (MotS), originally developed in Dörnyei's (2001) taxonomy. Studies indicate that teachers applying MotS can enhance students' motivation, in-class behavior, and academic success. While the effectiveness of specific strategies may vary across different EFL contexts, teacher behavior consistently proves to be a critical factor in boosting students' motivation (Lamb, 2017). Moreover, there has been a growing emphasis on conducting action research studies to explore how specific MotS, like warm-up activities, influence learner engagement in EFL settings (Velandia, 2008).

Research has also highlighted the importance of teacher-learner relationships in fostering students' motivation and willingness to communicate. Teachers who create a supportive learning environment, attending to individual needs and providing both academic and emotional support, are more likely to foster a sense of community among learners (Kálmán, 2023). Beyond relational aspects**,** Lamb (2017) posited that constructive teacher-student relationships are among the most influential motivational factors. Little (2007) further emphasized the role of EFL

teachers in promoting learner autonomy, advising that teachers must apply reflective and self-managing processes into the EFL journey. Dörnyei and Kubanyiova (2014) echoed this, stressing that teachers hold the most advantageous position in molding the EFL learning experience, having the potential to become revolutionary leaders. In the Ecuadorian educational landscape, EFL teachers transcend the traditional role of facilitators, emerging as exemplars of L2 acquisition while guiding students' linguistic development. These educators serve as pivotal catalysts for learner motivation by seamlessly integrating methodological expertise, empathetic mentorship, and advanced linguistic proficiency (Andrade-Molina, 2024).

In recent years there has been a call for more qualitative research to map the psychological factors and motivational constructs involved in the EFL learning experience. As Chen (2012) argued, qualitative approaches are essential for understanding sociocultural influences on L2 identity construction. Such studies can uncover the evolving changes in L2 motivation throughout the learning process. This study aimed to examine the EFL learning experience of non-English major university students in Ecuador through the lens of their teachers, identifying the key characteristics of this experience. It also seeks to explore the teacher's role in shaping students' EFL learning motivation, as perceived by the teachers, and to pinpoint the main factors that influence this role.

3 Method

This qualitative research employs a phenomenological approach to explore EFL teachers' perspectives on the experiences of non-English major university students learning English in Ecuador and the teachers' role in motivating them. This article focuses exclusively on the teachers' perceptions, emphasizing their nuanced views without undermining the importance of students' voices. In the present study, teachers are viewed not just as knowledge providers but also as crucial motivators and mentors in the learning process. As such, their insights are vital in shaping the learning experience. The research questions guiding this study were:

1. What characterizes the EFL learning experience of Ecuadorian non-English major university students from the EFL teachers' perspectives?

2. What characterizes the role of the teacher in the EFL learning motivation of Ecuadorian non-English major university students from the teachers' perspective?

This study examined the perspectives of Ecuadorian English teachers at a public university in Ecuador using two data collection methods: focus group interviews during the pilot stage and individual interviews in later phases. Employing both methods helped to enrich the data quality and demonstrates the methodological

rigor of this study, enhancing the credibility and reliability of its findings (Privitera & Ahlgrim-Delzell, 2018).

3.1 Research context

Participants in this study were EFL teachers from a public university in Ecuador, selected through convenience sampling with voluntary participation and consent. In Ecuador, learning a foreign language is required for a university degree, with students needing to achieve a B1 level before their final term. Although other languages are permitted, most universities offer only English courses.

As emphasized by Bravo et al. (2017) and Ortega and Fernández (2017), when assessing academic achievement, it becomes evident that Ecuadorian students' language proficiency upon completing their compulsory high school education falls significantly below the desired level of competence. To gain a more accurate understanding of this widespread issue across Ecuador, we have chosen to focus on non-English major students, as they constitute a demographic more representative of the country's general population.

To further investigate this topic, we selected a university known for its inclusive admissions, welcoming students from diverse cultural and social backgrounds. Its strategic location facilitates access to public education for students from both urban and rural areas. Regardless of their major, students at this university must complete five English courses and pass a proficiency assessment. Alternatively, they can present a B1 certificate for validation or take the proficiency test independently without attending the courses.

3.2 Participants

Ten English instructors participated in semi-structured interviews, they were all assigned a pseudonym to preserve their anonymity. The selection of participants was facilitated through convenience sampling, a method in line with Dörnyei's (2007) description of the sampling method: "members of the target population are selected for the purpose of the study if they meet certain practical criteria, such as geographical proximity, availability at a certain time, easy accessibility or the willingness to volunteer" (p. 85). Furthermore, since the instructors taught various levels each term, there was no need for specific class-based selection. The participants English teaching experience ranged from three to 21 years, and all held master's degrees with a specialization in teaching English as a foreign language obtained from reputable Ecuadorian and international universities. Detailed background information about each participant is available in *Table 1* (next page).

Table 1

Participants

Pseudonym	Age	Gender	TE (years)	PTE
Milena	29	Female	3	PE and HE
Daniel	37	Male	10	PE, SE, and HE
Pepe	33	Male	14	PE, SE, and HE
Carlos	49	Male	16	PE, SE, and HE
Julio	30	Male	10	HE
Felipe	49	Male	21	SE and HE
Gina	26	Female	4	SE and HE
Griselda	25	Female	2	HE
Wilmer	38	Male	9	HE
Anabel	41	Female	20	HE

Note: TE=Teaching Experience; PTE=Professional Teaching Experience; PE=Primary Education; SE=Secondary Education; HE=Higher Education.

3.3 Instrument

A semi-structured interview guide was developed as the data collection instrument. Due to its open-ended format, this type of instrument allows participants to expand on the phenomena under study using an exploratory approach, with advice and guidance from the researcher (Dörnyei, 2007). As Wallace (1998) argued, this type of data collection involves a "certain degree of control with a certain amount of freedom to develop an interview" (p. 147). The questions of the semi-structured interview guide were primarily drawn from previous research studies on language learning motivation presented in the literature review of this study (e.g., Dörnyei, 2005; 2009; Kálmán, 2023; Lamb, 2012). Additionally, continuous expert advice was obtained during the process of designing and validating the instrument for the pilot interviews. The instrument was piloted by two EFL instructors who were not part of the sample and worked at the university language institute in Ecuador.

3.4 Procedures and data analysis

This research adhered to APA ethical principles for research with human participants. All interviews were conducted online in Spanish, the respondents' first language, and video recorded on Microsoft Teams with their written consent.

The study began with a pilot phase involving a focus group of three experienced EFL educators who refined the interview questions and techniques. This pilot interview,

lasting 60 minutes, produced over 6,500 words. Minor adjustments were then made to some questions. Subsequent interviews lasted 46 to 50 minutes, resulting in a corpus of over 4,500 words. The authors translated quoted excerpts from Spanish to English.

Interviews were transcribed verbatim for data analysis, and a reflexive journal documented theoretical and reflective thoughts on potential codes or themes. Initial codes emerged through multiple readings of the data, highlighting specific features. A peer debriefing process ensured trustworthiness, with another researcher testing the coding schemes. The most relevant codes were sorted into themes (Braun & Clarke, 2006), with connection diagrams helping to refine them. Some themes were reworded, removed, or repositioned. Revisiting the raw data confirmed that the themes accurately reflected participants' responses and were free from researcher biases.

4 Results

This section outlined the results of the research, which were classified into two primary domains aligned with the study's research questions. Concerning the first research question, that is, the EFL learning experience of Ecuadorian non-English major university students from the teachers' perspectives, the emerging themes were categorized as follow: *reasons to learn English, students' perceptions of ideal English speakers, vision as English speakers,* and *situations to apply the language*.

Table 2

Reasons to Learn English

Emerging themes
Instrumental motives (e.g., fulfilling requirements for BA degree, higher salary, or better job)
Lack of (intrinsic) motivation to learn English

Four out of 10 EFL teachers noted that students' primary goal was to achieve a B1 level (a university requirement), but many lacked intrinsic motivation, leading to poor performance. Some students completing technical majors did not believe that English was necessary for their future careers in Ecuador. Annabel observed that "most of the time, their goal was simply set to get the B1 certificate."

To address this, teachers like Gina emphasized the broader importance of English, pointing out that many technical manuals and scientific articles were in English, and that it was essential for academic and professional growth. She noted that, "Students often expressed to me: 'Teacher, we don't find English useful anymore,'" highlighting the challenge of relevance, particularly among mechanical engineering students.

Griselda stressed the significance of linking students' majors to their English studies through an English for Specific Purposes (ESP) approach, which she believed could significantly boost motivation. For example, she stated that "nursing students would eagerly engage with vocabulary and phrases specific to their field." Daniel shared her perspective, saying, "I dreamed of the day when ESP would be seamlessly integrated into language programs across all Ecuadorian universities, firmly believing it would serve as a potent motivator for learning the English language."

Table 3

Students' Perceptions of Ideal English Speakers

Emerging themes
Native speaker as ideal L2 self
Teacher as ideal L2 self

The participants stated that when asked about their views on ideal English speakers, many EFL students believed that sounding like a native English speaker was necessary to demonstrate proficiency, although some interviewees challenged this idea. For instance, Daniel argued that "accurate pronunciation was less important in an Ecuadorian context, where opportunities to interact with native speakers were limited, and Spanish was the dominant language."

Preconceived ideas about ideal English speakers could negatively affect students' self-confidence and motivation to learn; however, Gina and Julio suggested that English teachers could serve as ideal language models by creating a safe and supportive environment for students to practice their language skills without fear of making mistakes. Julio also pointed out that "the importance of building strong relationships through language and teachers who demonstrate trustworthiness and excellence as human beings could serve as ideal models for learners."

Table 4

Vision as English Speakers

Emerging themes
Unclear vision as language users
Cultural environment as a barrier
Context as a barrier
Pointlessness

Anabel and Wilmer observed a lack of motivation among their EFL students to become proficient English speakers. Anabel believed this was due to the influence of their cultural environment and a fear of learning English, noting that students tended to set aside their learning once they had completed their courses. Wilmer's students associated language learning with working and living in other countries, but many expressed no desire to leave Ecuador and did not believe they would need English for their future plans. Carlos's students lacked motivation to use English in the future and only aspired to use it in basic conversations, though a few were eager to improve their language skills.

Table 5

Situations to Apply the Language

Emerging themes
Depending on their majors
Scholarships
Traveling abroad
Continuing their studies

Julio suggested that students benefited from learning English when it was necessary for their particular field, such as tourism. He noted, "Students studying tourism understood that English could help them in their careers." These students recognized the need to communicate with people from various countries, seeing English as a valuable tool. Likewise, those aiming to work or travel abroad appreciated the universal nature of English.

Julio also mentioned that strong English skills could open academic opportunities, such as scholarships to European universities where English was the primary language. However, he acknowledged that some students pursued advanced degrees in countries where English was not required. Wilmer added that more students were recognizing the importance of English for academic success and were seeking out courses to expand their university options.

Regarding the second research question, that is, the role of the teacher in EFL learning motivation in Ecuador, the emerging themes are organized along the following categories: *the teacher's role, the teachers' role concerning the ideal L2 self, teacher influence on students' opinions about EFL learning,* and *teacher influence on EFL motivation*.

Table 6

Teacher's Role

Emerging themes
Necessity of more positive feedback
Creating a supportive environment
Motivational strategies
The teacher as a learner's model
Adapting lessons to students' learning styles

Participants noted that factors such as students' age, familiarity with technology, and cultural background influenced a language teacher's role, as these elements shaped the strategies and approaches teachers adopted to meet diverse learning needs effectively. Anabel stressed the importance of positive feedback and a supportive environment to motivate students, adding, "Once students were motivated, it was time to increase the difficulty of activities to challenge them."

Milena, Carlos, and Pepe agreed on the critical role of motivation in language learning. Milena emphasized the importance of sharing personal experiences, encouraging questions, and normalizing mistakes, highlighting that "It was allowed to make mistakes in this class" and "It was mandatory to ask questions." Carlos highlighted the need to balance strictness with friendliness, while Pepe recommended using diverse strategies, such as explaining lesson objectives and designing tasks for individual learning styles. Pepe also emphasized sharing real-life success stories to show the practical benefits of learning English.

Table 7

The Teachers' Role Concerning the Ideal L2 Self

Emerging themes
Past learning experiences
Teachers as role models
Learners' sense of autonomy
The variety of resources to learn English
Teaching students different learning strategies

The role of teachers in shaping their students' ideal L2 selves was critical, as expressed by all participants in the study. Teachers acted as role models and provided inspiration and guidance on how to achieve language learning goals. Past learning experiences had a significant influence on students' motivation and perception of themselves as language users. Carlos emphasized that teachers should act as role models to boost students' confidence in class participation and reduce their fear of making mistakes. Felipe believed that learners should also be made aware that the teacher was not the only resource available to them:

> I think. In that sense, we must make the students understand that of course the teacher is one of the resources, but he is not the only one. They can easily handle technology, they can open up many more things and develop many abilities on their own. (Felipe)

He further emphasized that teachers should use a variety of strategies and provide students with opportunities to choose. He used the following analogy: "Teachers should not marry with one approach." He claimed that by using different strategies and offering variations tailored to students' language needs, teachers could enhance student autonomy and help them strengthen their ideal L2 self.

Table 8

Teacher Influence on Students' Opinions about EFL Learning

Emerging themes
Teacher's positive behavior in class
Teacher's positive attitude
Meaningful relationships with students
Having a sense of humor

Teachers viewed their behavior and approach as critical in shaping students' attitudes toward EFL learning. Participants highlighted the importance of building trust, fostering a friendly environment, and exhibiting positive behaviors to create a constructive learning experience. They emphasized that teachers should approach students with positivity, build meaningful connections, and maintain a sense of humor. They also highlighted the essential role of teachers in encouraging students to take ownership of their learning and providing opportunities for autonomy.

Carlos, for instance, used anonymous questionnaires to gather student feedback and found that positive attitudes toward mistakes were highly appreciated. The younger teachers in the study, such as Milena, Gina, and Griselda, believed that positive teacher attitudes were crucial in boosting students' confidence, and that students should be given the freedom to use the language without being afraid of making mistakes.

> Students are not just names on the list. They are human beings who go through different situations. Each one of them lives differently and learns differently with their own issues, so how we address them in class through our behaviors would greatly influence their learning. (Daniel)

I try to be myself in class, I try to reflect on who I am to my students, not always serious means that we could make a joke, and everybody can laugh for a moment. There are times when everybody is quiet and studying but also sometimes if something funny happens in class we can laugh and mess around for a while. (Milena)

Table 9

Teacher Influence on EFL Motivation

Emerging themes
Motivating students with enjoyable activities
English for specific purposes
Past learning experiences
Influence of peers and family

Most participants believed that while the teacher's role in motivating EFL students was important, it was not decisive, as many factors influenced language learning motivation. Anabel noted that past learning experiences, whether positive or negative, significantly impacted students' current motivation. She observed, "Some students arrived demotivated due to past traditional teaching methods that not only drained their enthusiasm but made them fearful of the language."

Felipe and Daniel discussed the influence of family and peers, agreeing that these factors could either encourage or discourage students. Felipe shared the following account: "I've seen peers discourage each other by saying they found English difficult and irrelevant, which often led others to agree." However, when a student's major was connected to English, the influence could be positive, as Daniel shared:

> When I was teaching students majoring in marketing, they consistently emphasized the importance of English, as much of the vital information was conveyed in this language. They even requested a focus on specific vocabulary related to their field, and this enthusiasm resonated with the rest of the class, motivating them to learn. (Daniel)

Participants commonly included warm-ups and engaging activities to maintain interest. Felipe, for example, used games in every class, regardless of the schedule, and kept a notebook of these activities in order to reuse them. He stated, "games were

a useful tool to engage my students and keep them interested. I always wrote down the games and warm-up activities I used so I wouldn't forget them."

5 Discussion

The findings of this study indicate that the Ecuadorian EFL learning experience—understood as learners' ongoing appraisal of their classroom ecology (teacher behaviors, task relevance, feedback, peer climate, and opportunities for success) shaped by prior encounters with English—is frequently characterized by low perceived relevance and limited opportunities to succeed beyond the classroom. Teachers described classroom climates where fear of error and scarce authentic use constrain participation; conversely, when teachers normalize errors, use humor, and provide clear purposes and scaffolded tasks, students report a more supportive experience and engage more confidently. This pattern aligns with research positioning the learning experience—not merely individual motives—as a proximal driver of motivated behavior (Csizér & Kormos, 2009; Lamb, 2012; Martinović & Burić, 2021).

Within this experiential frame, a recurrent feature shaping students' engagement is the institutional nature of English learning. In Ecuador, earning a university degree is contingent upon completing six English courses, equivalent to B2 proficiency according to the CEFR. Teachers reported that this requirement often leads students to perceive English as an obligation rather than a meaningful pursuit; consequently, many reduce their effort once the requirement is fulfilled. As Chen (2012) and Runde and Nealer (2017) observed, when learning is framed as an external requirement, engagement tends to fade once those obligations are met. This suggests that institutional pressure, rather than intrinsic or instrumental disposition alone, constitutes a significant element of the Ecuadorian EFL learning experience (Andrade-Molina et al., 2022; Bravo et al., 2017).

Another salient aspect of the learning experience concerns learners' perceptions of linguistic models. Several teachers reported that some students equate proficiency with native-like pronunciation, which fosters perfectionism and fear of error and, in turn, diminishes willingness to communicate. This perception echoes findings by Haidara (2016) regarding anxiety and communicative inhibition. When teachers act as credible L2 role models, set realistic communicative goals (e.g., reading technical manuals, collaborating with colleagues), and design tasks that emphasize intelligibility over nativeness, students tend to reframe English as attainable and professionally relevant. Framing goals around authentic interaction can transform the learning experience from anxiety to empowerment (Andreou & Galantomos, 2009; Dörnyei & Kubanyiova, 2014).

Socioeconomic and contextual disparities also shape how students experience English. Participants reported that learners from disadvantaged backgrounds have fewer opportunities for authentic use, access to technology, or mobility, which narrows

both exposure and expectations. These results mirror the findings of Kormos and Kiddle (2013), who demonstrated that learners' aspirations and experiences are embedded in their sociocultural and economic realities. In the Ecuadorian context, such inequalities often lead to uneven classroom dynamics in which students with greater access or confidence dominate participation while others remain silent (Ortega & Fernández, 2017).

Finally, anxiety emerged as a recurrent experiential barrier, often reinforced by peer judgment and previous negative schooling experiences. Students frequently come to view English as a subject to be passed rather than a communicative tool to be used. Participants suggested that collaborative projects and technology-mediated exchanges with international peers could provide low-stakes, authentic opportunities for use, yet such practices remain underused. Increasing opportunities for meaningful interaction—rather than prioritizing tests and grades—would enhance the perceived authenticity and value of learning (Velandia, 2008; Shute, 2008).

Taken together, these findings portray the Ecuadorian EFL learning experience as shaped by institutional pressures, linguistic ideals, socioeconomic context, and affective classroom conditions. Improving students' experiences requires moving beyond structural motives—such as graduation requirements or career advantages—toward creating environments where English feels meaningful, emotionally safe, and socially inclusive. Motives such as instrumentality or ideal self remain relevant, yet they operate through the quality of these experiences rather than independently from them (Csizér & Kormos, 2009; Boo, Dörnyei, & Ryan, 2015; Andrade-Molina, 2024). This trajectory naturally leads to the next focus: how teachers understand and enact their role within this experiential landscape.

Building on the previous findings about students' learning experiences, the second research question focused on the teacher's role in shaping motivation and engagement in the EFL classroom, the results suggest that effective language teaching requires a multifaceted approach that prioritizes students' motivation, engagement, and emotional well-being. Teachers agreed that motivation is key to learning a foreign language and that they must create supportive and challenging environments that foster progress. This research underscores the impact of teachers' positive attitudes, trust-building, and use of humor in creating a more effective and enjoyable learning environment. As demonstrated by participants like Carlos, Milena, and others, when educators approach their students with openness, positivity, and a willingness to connect on a human level, they not only enhance the learning experience but also empower students to embrace language learning with greater confidence.

Teachers also need to implement motivational strategies to help students handle situations that may affect their learning and encourage them to ask questions and voice their doubts, aligning with Shute´s (2008) notion of formative feedback, which can help learners identify strengths and areas for improvement. Another common pedagogical

practice mentioned was the integration of warm-up activities and educational games as a means of stimulating students. In a similar EFL context, Velandia (2008) found that warm-ups in the classroom grab students' attention and facilitate participation.

The participants also discussed the teacher's role in shaping students' confidence and motivation to pursue their ideal L2 selves. The participants claimed that teachers should act as role models, as exposure to successful L2 speakers can positively impact L2 motivation. This finding supports the results of research which has shown that students benefit from concrete examples of proficient language use, offering them a tangible model of what they can achieve (Dörnyei, 2009; Dörnyei & Kubanyiova, 2014). Based on the participants' feedback, teachers should also foster learner autonomy by providing strategies that suit students' needs, helping them take ownership of their learning. Dörnyei and Kubanyiova (2014) argue that since the learner's sense of autonomy involves both the ability to take control of their own learning and the willingness to do so, promoting learner autonomy is crucial for the development of the ideal L2 self. Similarly, Little (2007) emphasized that one of the critical aspects of learner autonomy is the ability to make decisions about one's own learning, and teachers should create environments that encourage students to take responsibility for their progress.

Finally, while the teacher's role is important in motivating students, other factors such as past experiences, family and peer influence, and personal interests also contribute to shaping their motivation. This coincides with Lamb's (2012) statement that "it is not only school experiences that count; the potential enjoyment gained by learning outside school, for example through listening, watching or reading English language media, is also a contributory factor" (p. 1014). The participants recommended several strategies for motivating students outside the classroom, such as emphasizing the importance of English in their future careers through the use of ESP. Basturkmen (2010) similarly drew attention to the motivational influence of ESP, as it equips EFL students with the language skills needed to achieve their academic or professional goals. Additionally, ESP often integrates interdisciplinary learning, expanding university students' understanding of their major by connecting diverse areas of knowledge (Swales & Feak, 2004).

6 Conclusion

This article places strong emphasis on the essential role that student motivation plays in the overall success of the EFL learning experience. It contends that an effective teaching approach must extend beyond the confines of the direct influence of the teacher and consider a multitude of factors that go beyond the classroom. These additional factors include the students' previous language learning experiences, the impact of their families and peers, and the relevance of English to their chosen academic major or career. Notably, one particularly powerful motivator is the importance of setting clear, purpose-driven goals for learning English. By aligning language instruction with the

specific needs and goals of the students, such as through ESP programs, educators can significantly enhance their students' commitment to language learning and ultimately improve their overall language proficiency. This holistic approach acknowledges the intricate web of influences that shape students' EFL language learning journey and strives to leverage these factors to create a more engaging learning environment. To this end, educators may consider designing lessons that extend beyond the realms of grammar and vocabulary. These lessons may incorporate activities that invite students to ponder their journey in language learning, engage in discussions about their language learning objectives, and envision themselves applying the language in authentic real-life scenarios. Through these approaches, teachers have the potential to assist students in establishing attainable goals and fostering a sense of themselves as proficient language users.

Given that, in this study, teachers are viewed as role models of language proficiency, rethinking teacher training is essential. Traditional methods in Ecuador, which emphasize grades and punitive measures, have not delivered the expected outcomes. In light of the findings, EFL teacher training programs should prioritize the development of empathy and the strategic use of humor as essential classroom practices. Moreover, they should place a strong emphasis on fostering positive attitudes toward the teaching profession itself—key aspects that are frequently overlooked in conventional training approaches. Incorporating these elements into professional development is vital for enhancing the effectiveness of English instruction, especially in the challenging Ecuadorian context.

There are several considerations that should be acknowledged when interpreting the findings of the present study. Firstly, it focused exclusively on EFL instructors from one public university in Ecuador, which may limit the transferability of its insights to other educational contexts. Secondly, the study relied solely on teachers' perceptions, which, while valuable, may not fully capture students' experiences and perspectives. Thirdly, the research employed a convenience sampling approach, and it is possible that the teachers who voluntarily participated were among the more proactive and motivated instructors. This potential bias should be considered when generalizing the results to the wider EFL teacher population. Lastly, the study did not examine the direct impact of specific motivational strategies on students' language learning outcomes, highlighting the need for further research in this area. Future studies could explore how teachers can effectively integrate motivational strategies based on the ideal L2 self construct in their language teaching practice and assess their impact on students' motivation and learning progress. Additionally, incorporating student interviews and surveys could provide a more holistic understanding of the factors shaping EFL motivation and learning behavior among Ecuadorian university students.

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5

Emotional Labor and Its Impact on Motivation: A Study of Ecuadorian English Teachers

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Abstract

Although emotional labor has been widely studied in teacher motivation research (Hochschild, 1983; Sutton, 2004; Taxer & Frenzel, 2015), most empirical work has focused on Western and Asian educational contexts, with limited attention to Latin American settings. This study addresses that gap by exploring the emotional experiences of Ecuadorian EFL teachers, particularly the emotions they choose to express or conceal, and how these emotions influence their motivation to teach. Semi-structured interviews with 10 teachers revealed that positive emotions—such as joy, pride, and enthusiasm—were closely linked to student engagement and teacher satisfaction. Negative emotions, including frustration and sadness, were reported as internal challenges that teachers often suppressed to maintain professionalism. While negative emotions were present, they did not significantly diminish motivation; rather, positive emotional experiences emerged as central to sustaining engagement and a sense of fulfillment in teaching. These findings underscore the complexity of emotional labor in educational settings and point to the importance of incorporating emotional awareness and regulation into language teacher training programs.

Keywords:
emotional labor, teacher motivation, EFL teachers, Latin America, classroom dynamics, Ecuador

1 Introduction

Teaching is inherently emotional, involving a wide range of experiences that require teachers to regulate and manage their emotions effectively. Teachers are often

expected to conform to emotional display rules, which encourage the expression of positive emotions such as joy and enthusiasm while discouraging visible displays of frustration or disappointment to maintain a professional and supportive classroom environment (Chang, 2020; Taxer & Frenzel, 2015). In English as a Foreign Language (EFL) classrooms, these emotional demands are heightened by the interactive nature of language instruction and the cultural expectations placed on educators.

These expectations reflect the emotional labor involved in teaching—an effort that requires individuals to manage and sometimes modify their emotional expressions in alignment with institutional norms and professional standards (Hochschild, 1983). In educational contexts, emotional labor entails balancing genuine feelings with the emotions teachers are expected to display, such as enthusiasm, empathy, and composure, even in challenging circumstances. This process highlights how teaching is not only a cognitive and social endeavor but also a deeply emotional one.

While extensive research has explored the emotional dimensions of teaching in relation to student outcomes (Frenzel et al., 2009; Pekrun, 2021; Schutz & Pekrun, 2007), less attention has been paid to how teachers' own emotional experiences influence their motivation and professional engagement, particularly in specific cultural contexts such as Ecuador. Addressing this gap is critical, as teachers' emotional well-being not only affects their ability to manage classroom dynamics but also plays a crucial role in sustaining their long-term motivation and effectiveness in teaching.

This study investigates the emotional experiences of Ecuadorian EFL teachers, focusing on the emotions they display, those they conceal, and the ways in which these emotions impact their motivation to teach. Drawing on data from semi-structured interviews with ten teachers, the research examines the dual role of emotions in both supporting and challenging teacher motivation. By exploring these themes, the study contributes to the expanding body of knowledge on emotional labor in teaching and its impact on teacher motivation.

2 Literature Review

2.1 Teachers' Emotional Displays in the Classroom

Classrooms can be recognized as inherently emotional spaces, a sentiment likely shared by anyone who has spent time in one. For teachers, these emotions can range from the excitement of accomplishing the goals of their lessons to the sadness of discovering that a student is experiencing abusive behavior from their peers (Schutz & Pekrun, 2007). While young learners often openly display their emotions (e.g., anger or hopelessness after receiving a low score, enjoyment during engaging classroom activities, or anxiety when facing a difficult test), for teachers this is an entirely different matter. As adults and professionals, teachers are generally expected to master the art of controlling and concealing their emotions, particularly in the presence of their students.

A key aspect of understanding teachers' emotional experiences lies in the concept of display rules. As Sutton (2004) noted, teachers often regulate their emotions based on these display rules, which dictate appropriate emotional expressions in educational settings. These rules are shaped by various influences, including school community members such as parents, colleagues, and administrators, as well as family values and broader social and cultural norms. When internalized, either consciously or subconsciously, these rules become an integral part of their professional identity and are reflected in their teaching approach. Moreover, many teachers believe that effective emotional management is essential for achieving their educational goals, such as enhancing the quality of learning, meeting social expectations, and ensuring effective classroom management (Sutton, 2004).

Several authors (Chang, 2009, 2020; Frenzel, 2015; Ruiter et al., 2021; Sutton, 2004; Taxer & Frenzel, 2015; Zembylas, 2005) have noted that emotional display rules for teachers are often not explicitly outlined in school policies. Zembylas (2005) highlighted that teachers frequently navigate emotional appropriateness without formal training or institutional support (Chang, 2020; Sutton, 2007). Stark and Bettini (2021) argue that school administrators—such as principals, assistant principals, and department heads—bear the responsibility of ensuring that teachers' emotional expressions align with students' needs and the goals of the school. If discrepancies arise, these school leaders are expected to establish clear emotional display expectations that reflect the school's culture and educational objectives.

This administrative regulation of emotional expression underscores the significant emotional labor required of teachers. Originally conceptualized by Hochschild (1983), emotional labor refers to the regulation and display of emotions in accordance with job expectations and institutional demands. In educational contexts, this concept becomes particularly salient under a customer-oriented approach. Constanti and Gibbs (2004), in their study of higher education, argued that students are often positioned as customers, prompting an institutional emphasis on creating a pleasurable academic experience. As a result, teachers are expected to deliver not only content expertise but also emotional performances that satisfy students. The role of school leaders in monitoring and guiding teachers' emotional displays thus reflects a broader institutional expectation that teachers maintain emotional conduct aligned with student satisfaction, reinforcing emotional labor as a central, yet often underacknowledged, dimension of teaching.

In the Ecuadorian educational context, English teachers also appear to engage in emotional labor. As defined by Hochschild (1983), emotional labor involves three primary aspects: direct personal or verbal interaction with others, efforts to influence specific emotional states in others (e.g., gratitude or fear), and managerial oversight that controls employees' emotional expressions through structured training and supervision. These elements are evident among teachers in Ecuador, who engage in face-to-face interactions with students and other stakeholders (e.g., parents, administrators, and

policymakers), employ teaching methods that evoke various emotional responses from students, and have their classroom practices monitored by educational authorities. Classroom observations and feedback mechanisms, such as those established through the Ministry of Education's Programa de Acompañamiento Pedagógico en Territorio (PAPT), illustrate the institutional emphasis on supervision and professional conduct (Ministerio de Educación, 2018). However, explicit assessment of teachers' emotions remains rare, as professionalism tends to be prioritized over emotional expression. These observations also draw on the author's teaching experience in both high school and university settings in Ecuador, where such evaluative practices and expectations are common. This aligns with findings by Hagenauer and Volet (2013) and Zembylas (2005), who note that the display of strong emotions is often considered unprofessional in educational settings. Collectively, these considerations align with Hochschild's criteria, indicating that Ecuadorian teachers engage in emotional labor.

2.2 Emotions in the Classroom

According to Sutton (2004), teachers recognize a link between their instructional objectives, such as effective classroom management and the prevention of disciplinary issues, and the practice of emotion regulation. Teachers' ability to manage their emotional responses is especially crucial when faced with situations during their lessons that may provoke anger or frustration. Furthermore, Chen and Tang (2024) argue that managing emotions enhances teachers' cognitive functioning, leading to greater efficiency in their teaching practices. By consistently applying emotion regulation strategies, teachers become better equipped to navigate daily challenges, creating a more productive and supportive learning environment.

Expanding on this, Taxer and Frenzel (2015) explore the distinctions and overlaps between the concepts of emotion regulation and emotional labor, both of which are central to understanding how individuals manage their emotions. Emotion regulation, as defined by Gross (1998), involves the "processes by which individuals influence which emotions they have, when they have them, and how they experience and express these emotions" (p. 275). In contrast, Grandey (2000) describes emotional labor as the effort to align internal feelings and external expressions with professional expectations. Within this framework, Taxer and Frenzel (2015) note that both emotion regulation and emotional labor involve strategies for modulating emotions, such as suppression and surface acting, which aim to make emotional expressions socially appropriate. However, the primary focus of each framework differs: emotion regulation is often concerned with the suppression of negative emotions to mitigate stress, whereas emotional labor emphasizes the enhancement of positive emotions to fulfill job demands, employing the various techniques discussed below (Taxer & Frenzel, 2015).

A study carried out by Diefendorff et al. (2005) identified three primary strategies of emotional labor: surface acting (SA), deep acting (DA), and genuine expression. Surface

acting involves the outward display of emotions that do not align with one's true feelings, often requiring individuals to feign positive emotions or suppress negative ones. In contrast, deep acting entails an internal effort to genuinely feel the emotions being expressed, particularly positive ones, so that outward expression feels authentic. Grandey (2003) describes SA as "faking in bad faith," reflecting its inauthentic nature, while characterizing DA as "faking in good faith" due to its alignment with genuine emotional experiences (p. 87). Genuine expression, on the other hand, refers to the natural conveyance of emotions that are authentically felt and consistent with established emotional norms (Li & Liu, 2021). In the context of education, emotional labor plays a critical role, as teachers must skillfully manage both their emotions and those of their students to create a supportive learning environment. Given the intense and sustained nature of teacher-student interactions and their profound influence on students' emotional and social development (Wang et al., 2019), this study focuses on emotional labor as a distinct construct within emotion regulation, emphasizing its unique relevance to the teaching profession.

The impact of teachers' emotional expressions extends beyond simple classroom management; it significantly influences both the emotional and academic outcomes of students. As demonstrated in a study by Frenzel et al. (2009), teachers' enthusiasm for subjects such as mathematics not only enhances their own enjoyment but also significantly increases that of their students. This dynamic interaction underscores the effectiveness of a learning environment characterized by positive emotions, highlighting the reciprocal nature of emotional influence between teachers and students.

Richards (2022) identified several key factors that contribute to the emotional atmosphere of a classroom, including teachers' perceptions of their educational roles, their interaction dynamics with students, the use of teaching materials, classroom management strategies, and the roles assigned to students. Richards also highlighted the importance of fostering supportive connections among educators and active participation in professional networks, both of which are crucial for reinforcing teachers' commitment and emotional resilience. Similarly, Chen and Tang (2024) argue that teachers who develop effective emotional management skills can transfer these abilities to their students. They further emphasize the role of educational administrators in establishing ideal working conditions to enhance teachers' mental and emotional well-being, recognizing this as a vital component of effective teaching.

Managing negative emotions is a fundamental part of teaching. Ramírez (2023) found that Mexican EFL teachers encountered various workplace challenges that gave rise to negative emotions and emotional labor. To maintain a positive classroom environment, they often suppressed these emotions to ensure student learning was not adversely affected. Other studies (e.g., Thùy & Hương, 2024; Wu et al., 2023; Yao et al., 2023) highlight the importance of regulating or suppressing negative emotions to support learners' well-being. Thùy and Hương (2024) suggest minimizing negative feelings,

displaying positive ones, and adapting to classroom dynamics through strategies such as humor and encouragement to cultivate a positive atmosphere. Moreover, Moskowitz and Dewaele (2021) demonstrate that teachers' enthusiasm and positive attitudes enhance classroom dynamics, motivating students to excel. Effective emotional management not only supports a constructive learning environment but also enriches both teachers' and students' experiences.

2.3 The Motivating Effect of Emotions

While empirical research specifically examining the impact of teachers' emotions on their motivation remains scant, it is well-documented that emotions profoundly influence educational dynamics. This gap in the literature underscores the novel aspect of the present study, which aims to explore the emotions reported by Ecuadorian English teachers and their role in shaping teaching motivation. Research into educational environments, such as that of Schutz and Pekrun (2007), shows that emotions significantly affect interactions, academic learning, and individual achievement for both educators and learners. This parallel between the emotional experiences of students and teachers supports the extrapolation from student-focused studies to teacher-focused inquiries in the absence of direct research.

MacIntyre and Vincze (2017) investigated the role of emotions in language learning, finding that positive emotions tend to be more strongly linked to motivational mechanisms than negative emotions. However, they also noted that intense negative emotions, such as anger and hate, correlate strongly with all motivational variables due to their heightened intensity, suggesting that negative emotions can also enhance motivation. Similarly, Dewaele and MacIntyre (2014) observed that female students experienced higher levels of both foreign language enjoyment and anxiety, suggesting a complex interplay between different emotional experiences and learning outcomes.

In a similar vein, López and Aguilar (2013) investigated the emotional experiences that influence university students' motivation to learn English in Mexico. They revealed that although negative emotions could initially hinder motivation, they also prompted students to reflect on their learning situations, leading to strategic adjustments that improved their language skills and maintained their motivation to overcome challenges. These findings underline the transformative potential of reflecting on emotional experiences in educational settings.

In examining the interplay between emotions and motivation, Méndez (2011) found that negative emotions experienced by students in English Language Teaching (ELT) courses did not detract from their motivation. Instead, factors such as the teacher's attitudes and the classroom environment proved crucial, indicating that responsive teachers could significantly boost student engagement and motivation. This aligns with Pekrun's (2021) assertion that while emotions can directly influence motivation,

motivation can also arise from sources unrelated to emotional states, such as a teacher's professional ambitions or financial needs. Furthermore, the teaching process often elicits intense emotional responses from educators, shaping various aspects of their professional lives, including their motivational levels and classroom behaviors (Pekrun, 2021). These emotional experiences are not only critical for teachers but also play a crucial role in shaping student outcomes, affecting their emotional states, well-being, and academic achievements.

These studies collectively underscore the importance of the emotional climate teachers create and their responsiveness to emotional cues in shaping educational outcomes. Understanding the emotional dynamics in the classroom, particularly from the teachers' perspective, is essential for improving both teaching practices and student learning experiences. In summary, the literature reviewed in this section highlights that a nuanced understanding of how emotions and motivation interact can enhance the efficacy of teaching and, subsequently, the learning experiences of students.

3 Methods

This investigation employed a qualitative research design to explore the perspectives of EFL teachers in Ecuador, a country where English is taught as a foreign language across diverse educational contexts. Data was collected from various types of educational institutions, including public and private high schools, universities, and language academies. Ecuador's educational system provides a unique context for researching the interplay between emotions and motivation, with local teachers navigating various challenges, such as diverse student backgrounds, institutional demands, and cultural expectations. By focusing on teachers' emotions, this research aims to understand how emotions are managed in Ecuadorian classrooms and their influence on teaching motivation.

The primary objective of this study was to identify the emotions that EFL teachers consider appropriate to display in the classroom, those they believe should be concealed, and the potential impact of these emotions on their motivation to teach English. Additionally, the study aimed to explore teachers' strategies for managing emotions and their perceptions of how these emotions influence their teaching motivation. To address these objectives, the following research questions were formulated:

RQ1. Which emotions are deemed appropriate for Ecuadorian English teachers to display in the classroom, which emotions should be concealed, and what are the underlying reasons for these choices?

RQ2. How do the concealed or openly expressed emotions of Ecuadorian English teachers influence their motivation to teach?

3.1 Participants

10 teachers were selected for the qualitative research study through convenience sampling methods (Braun & Clarke, 2006), with voluntary consent gained from the participants. The teachers were employed across diverse educational institutions in Ecuador, encompassing elementary and high schools, language academies, and universities, with their primary role being the teaching of English as a foreign language. The group consisted of four females and six males, ranging in age from 28 to 48 years. Their teaching experience varied, ranging from 5 to 22 years. Each participant possessed a bachelor's degree in education with a specialization in English, and five had pursued further education by earning a master's degree in English. Additionally, one participant held a master's degree in educational management and expressed an aspiration to contribute in an administrative role at a high school in the future (see the summary of the participants' characteristics in Table 1).

Table 1

Participants

Teachers' pseudonyms	Age	Gender	Educ.	Years of exp.	Teaching exp.	Current school type	Current students' age
Martha	32	Female	B.A.	11	HSs and JHSs	Public	4-6
Pablo	34	Male	B.A.	12	HSs and Univ.	Public	18-40
George	28	Male	M.A.	6	HSs, JHSs and Univ.	Public	14-18
Renata	31	Female	B.A.	5	HSs and Univ.	Public	12-15
Rose	43	Female	M.A.	22	HSs and JHSs and Univ.	Private	Young and adults
Ben	48	Male	M.A.	15	HSs and JHSs and	Public	12-16
Josh	37	Male	M.A.	15	Univ. and HSs	Public	14-17
Dana	39	Female	B.A.	15	HSs and Univ.	Public	17-20
Eric	36	Male	M.A.	10	Univ., L. Inst. and HSs	Public	12-24
Xavi	42	Male	M.A.	10	Univ and HSs	Public	18-40

Note. HSs=high schools; JHSs=junior high schools; Univ.=university; L. Inst.=Language Institute

3.2 Instrument

Semi-structured interviews were selected as the data collection method due to their recognized adaptability (Dörnyei, 2007). Since no existing interview guide on the subject matter was identified, a custom set of questions was developed for this study. The interview guide (see *Appendix A*) was originally devised in English and subsequently translated into Spanish to facilitate communication with participants in their native language. The instrument included 13 questions related to the teachers' biographical information and personal background to provide relevant information on the participants. To address the research objectives, 16 interview questions were designed by the author to explore participants' views on emotions deemed appropriate to display in the classroom, those that should be concealed, and the existence of emotional display rules in their workplaces (RQ1).

Additionally, they were asked about the potential impact of classroom emotions on their motivation to teach and the possible consequences of experiencing positive or negative emotions in their teaching practice (RQ2). The questions of the instrument were informed by prior research on teachers' emotions in the classroom, emotional display rules, and emotional labor (Hochschild, 1983; Schutz & Pekrun, 2007; Sutton, 2004; Taxer & Frenzel, 2015; Zembylas, 2005).

3.3 Procedures and Data Analysis

Prior to the commencement of the study, an initial pilot test of the interview schedule was conducted with the assistance of a university English teacher in Ecuador. Based on the outcomes of the piloting, minor adjustments were made to the interview schedule, primarily focusing on rephrasing specific questions to improve clarity for the participants.

Following this, the selected teachers who had agreed to participate in the study were contacted, and interview sessions were scheduled at mutually convenient times. The interviews were conducted online in the participants' native language, Spanish, with an average duration of 40 minutes. Prior to initiating the interviews, explicit consent (see Appendix B) was obtained from the participants for video recording the sessions. They were also provided with detailed information about the researcher's background, the purpose of the interview, and their right to withdraw from the interview at any stage. Additionally, the participants were assured that their real names would remain confidential, with pseudonyms used in the research report. The video recordings of the interviews were transcribed, and each transcription underwent meticulous line-by-line review to ensure accuracy.

The QDA Miner Lite program was employed as a tool for qualitative data analysis. Each transcript was inputted into the program to facilitate the analysis of participants' responses to the interview questions. Using an inductive approach, thematic analysis

(Braun & Clarke, 2006) was conducted to categorize the interview data into overarching themes. This method involved identifying patterns and themes that emerged directly from the data. Initially, a set of general codes was generated through open coding, which were then subsequently refined by grouping related codes and assigning appropriate labels to the combined categories. This iterative approach to data analysis allowed for the identification of key themes that addressed the research questions. The nine emerging themes identified through this exploratory study are presented in Table 2.

Table 2

Emerging Themes from Teacher Interviews

Emerging theme	Description
Positive Emotions in Teaching	Joy, pride, enthusiasm, and satisfaction linked to student achievement and classroom engagement.
Triggers of Positive Emotions	Active participation, creativity, and comprehension by students as key triggers of positive teacher emotions.
Emotion Management Strategies (Positive)	Balancing warmth with authority; adjusting emotional expression based on classroom context.
Negative Emotions in the Classroom	Frustration, anger, helplessness, and apathy triggered by student misbehavior or disengagement.
Concealment of Negative Emotions	Suppression of negative emotions to maintain professionalism and avoid disrupting learning.
Emotional Labor in Professional Challenges	Emotional demands during personal hardship, illness, or conflict with students.
Positive Emotions and Motivation	Positive emotions as motivational drivers; emotional reciprocity with students enhances motivation.
Negative Emotions and Demotivation	Frustration and anger reduced motivation, though some teachers managed these emotions with composure and emotional regulation.
Reflection and Adaptive Strategies	Teachers reflected on emotional challenges and adjusted their approaches to sustain motivation and classroom harmony.

4 Results and discussion

The results of this study are presented in alignment with the two research questions. The first section (4.1 and 4.2) addresses RQ1 by analyzing which emotions Ecuadorian EFL teachers consider appropriate to express or conceal in the classroom, and the underlying reasons for these choices. The second section (4.3) focuses on RQ2 and explores how these emotional experiences influence teachers' motivation to teach. Within each section, the data is organized by emergent themes derived through thematic analysis, which reflect both the emotional content and the strategies described by participants.

4.1 Participants' Positive Emotions and Their Main Triggers

The teachers in this study consistently expressed beliefs that displaying positive emotions benefits students by fostering engagement and motivation. They noted that emotions such as enthusiasm, pride, and joy help create a supportive classroom atmosphere, encouraging active participation and making lessons more enjoyable. These emotions were seen as a way to inspire students to approach learning with greater interest and confidence, reinforcing their connection to the subject matter. However, the findings indicated that teachers did not follow any formal rules related to emotional display, which is consistent with existing research highlighting the absence of explicit guidelines in many educational contexts (Chang, 2009, 2020; Frenzel, 2015; Ruiter et al., 2021; Sutton, 2004; Taxer & Frenzel, 2015; Zembylas, 2005). Instead, their emotional expressions were shaped by the perceived benefits for classroom dynamics and student engagement, with a strong focus on maintaining professional balance, as noted by Hagenauer and Volet (2013) and Zembylas (2005).

All the participants agreed that positive emotions should be displayed in the classroom, as they can benefit students' learning, foster greater interest in lessons, and improve teacher-student relationships. The most frequently mentioned positive emotions during the interviews included joy, pride, satisfaction, happiness, and enthusiasm. While participants recalled these emotions, they also reflected on the specific situations that triggered them. These scenarios are important to note, as they provide insight into the circumstances that might lead to the free display of certain emotions by teachers in their daily teaching practice.

All interviewees reported experiencing satisfaction, happiness, joy, and pride when their students exceeded their academic expectations. These emotions arose, for example, when students demonstrated creativity in performing a task, studied hard for oral presentations, actively engaged with the lesson topics, showed genuine intent to learn the language, or understood the teacher's explanations and applied what they had learned. These results confirm earlier findings by Frenzel et al. (2009), who reported that teacher enjoyment often stems from student engagement and academic progress. Similarly, Moskowitz and Dewaele (2021) found that teachers' positive emotions can be

"contagious," influencing students' motivation and reinforcing teachers' own emotional well-being.

Xavi reflected on the transformative experience of introducing a novel teaching strategy to his university students, which not only cultivated a shared sense of belonging but also elicited positive emotions. While he expressed gratification at seeing his students actively engaging with the English language through their performance, Xavi emphasized the deeper connection and collective joy that emerged from this innovative approach:

> One of the best strategies I've found for boosting student participation is Readers' Theater, where some students read while others act. Inspired by this, I once told my students, 'Let's not just act; come dressed and ready to create the whole scene.' They fully embraced it, bringing costumes and scenery, turning our classroom into a lively stage. We shared laughter and connection, creating a deeply positive experience. (Xavi)

This example illustrates how emotional expression can serve as a pedagogical tool, reinforcing Richards' (2022) emphasis on the teacher's role in shaping the emotional atmosphere of the classroom through interaction and creativity.

Similarly, Josh shared his profound satisfaction and joy when reflecting on a memorable event involving a classroom visit by an educational evaluator from the Ecuadorian Ministry of Education. During this visit, the evaluator observed the students' remarkable fluency in the language, their keen participation in the class activities, and the positive impression that they made. Eric added that positive emotions, such as joy and pride, can be demonstrated freely when students achieve their academic goals, providing a valuable opportunity to encourage and motivate students to continue progressing in their learning journey.

Another notable situation that can elicit satisfaction among teachers is students' comprehension of their management tactics and teaching style. George highlighted the importance of his pupils becoming acquainted with his classroom methodology. He emphasized the critical role of providing support when they encounter difficulties, ensuring that no student is left behind. This approach not only promotes individual progress but also facilitates collective advancement, evoking a strong sense of satisfaction in George.

Eric, Axel, and Josh explicitly described their strategies and beliefs regarding emotional expression in the classroom. Eric, in particular, shared his strategy for engaging with students, stating:

> In vibrant and positive classroom atmospheres, I engage more casually, sharing laughter and fun, contingent on student trust, respect, and responsibility. Yet, in the face of disruptive behavior, I adopt a stricter demeanor to maintain both authority and a friendly environment. (Eric)

These findings are consistent with previous research showing that teachers actively regulate their emotional expressions to maintain a productive classroom climate (Sutton, 2004; Taxer & Frenzel, 2015). In particular, the strategic display of positive emotions has been linked to student engagement and improved classroom dynamics.

Axel discussed the adaptability of his emotional expressions, noting: "The unique dynamics of each class guide my emotional expressions, balancing authority with approachability. I find moments for humor and a lighter touch when students are engaged and respectful, while also being cautious not to lose control or respect." This aligns with Richards (2022), who pointed out that the emotional atmosphere in the classroom is shaped by multiple factors, including the teacher's interaction dynamics with students and classroom management strategies. Similarly, Josh elaborated on the importance of moderation, explaining: "Moderation in expressing positive emotions is key to fostering a supportive yet disciplined classroom. It encourages open engagement and confidence in seeking help, without compromising the teacher's authority or being perceived as overly permissive".

The three teachers quoted above provided specific strategies for managing positive emotions in the classroom, but all participants agreed on the importance of balance. Excessive positivity, they noted, could lead to confusion, with students potentially perceiving overly friendly teachers as permissive. On the other hand, excessive strictness might intimidate students, damaging the teacher-student relationship. This consensus echoes Zembylas' (2005) work, which emphasizes the emotional fine line teachers must navigate between approachability and professionalism.

Finally, Ben and Xavi expressed specific beliefs regarding the transmission of emotions in the classroom. They argued that teachers' emotions are contagious, with students influenced by both positive and negative emotions. Both agreed that negative emotions provide no benefit to students and that displaying positive emotions in the classroom should be aimed for instead. As Xavi explained, an enthusiastic teacher's emotions can inspire similar reactions in students; however, he also highlighted that this effect is not automatic. Instead, it requires consistent effort, as teachers must practice this type of enthusiasm daily to see meaningful and lasting positive effects among their students:

> As a mirror to your students, you reflect emotions that can significantly influence them. When you enter the classroom radiating energy, dynamism, and a proactive mindset, your students will gradually absorb this positivity. This transformation doesn't happen instantly, but over time, they will start to emulate your enthusiasm and approach classes with a similar spirit. (Xavi)

Ben also mentioned that emotion transmission works similarly for both young and adult learners, stating that learners at any age can be affected by the emotions teachers convey in the classroom. These perspectives reinforce the bidirectional nature

of emotion in education highlighted by Schutz and Pekrun (2007), where teacher and student emotions interact continuously and shape the classroom climate.

4.2 Participants' Negative Emotions and the Situations That Trigger Them

In the interviews, teachers reported deliberate efforts to temper, regulate, or mask negative emotional responses during teaching activities. This self-regulation was deemed critical for maintaining the quality of instruction and adhering to the professional standards expected of them as foreign language educators. The following analysis examines the reported experiences of emotions such as anger, frustration, apathy, sadness, and helplessness, aiming to understand how these emotions influence the teaching practices of English educators in Ecuador.

In general, the participants agreed that negative emotions should be avoided in the classroom. As Xavi expressed, "emotions such as anger, thoughts of sadness, frustration, and helplessness must be entirely excluded from the educational environment; the classroom is no place for negativity of any kind". When asked to describe a professional experience in which they felt compelled to hide their emotions, the most frequently cited emotions were anger, followed by frustration.This aligns with previous studies indicating that teachers often suppress negative emotions to meet professional expectations and protect the classroom climate (Sutton, 2004; Taxer & Frenzel, 2015; Zembylas, 2005).

Renata justified her beliefs that anger should be concealed in the classroom:

> I can't just show my anger to the students or talk to them in a negative way like asking, "Why aren't you working?" or "What's the problem with you?" I need to stay professional and follow institutional rules, or I could lose my job." (Renata).

Dana recounted a challenging incident in a recent foreign language class in which a student's misbehavior—throwing paper balls—evoked feelings of anger. Her account underscores the complex balance teachers must strike between addressing disruptive behavior and adhering to professional standards, all while managing their emotional responses in line with institutional policies and the decorum expected within the educational environment. Situations involving classroom misbehavior often lead to emotional strain for teachers, especially when professional expectations require them to suppress their true feelings. This has been widely acknowledged in research on emotional labor and teacher identity (Sutton, 2004; Zembylas, 2005).

Rose reflected on the complexities of teaching in private educational settings, stating:

> At the private language school where I work, students can order coffee in class. I faced a challenging student who prioritized her phone over participating. I tried to engage her with questions, but she resisted. Her request for coffee

> mid-lesson disrupted our flow, leading me to allow a brief break to diffuse the situation. Although frustrating, I focused on maintaining classroom harmony and educational goals, balancing the need to address disruptive behavior with controlling my emotions. (Rose)

This situation reflects the broader issue of emotional labor in teaching. In educational contexts, especially in private institutions where students are often treated as customers, the pressure to meet expectations can significantly increase the demand on teachers to maintain professionalism and control, even in challenging situations (Constanti & Gibbs, 2004). Rose's experience illustrates the complexity of teaching in such environments, where the dual roles of educator and service provider intersect, necessitating careful emotional regulation to effectively navigate these expectations.

The considerable effort required to suppress negative emotions aligns with Chen and Tang's (2024) findings on the importance of emotional regulation in enhancing teaching efficiency and cognitive functioning. Their research highlights the role of supportive institutional environments and favorable working conditions in helping teachers manage their emotions at work, thereby sustaining their professional motivation and overall well-being.

Axel, George, and Martha shared that they often experience anger and frustration when their students are either unwilling or unable to follow instructions during class. The experiences shared by Xavi, Renata, Dana, and other participants emphasize the need to suppress negative emotions like anger and frustration in the classroom, aligning with the concepts of display rules and emotional labor in the literature (Hochschild, 1983; Sutton, 2004). These display rules are shaped by institutional, cultural, and social expectations, which in turn influence how teachers navigate their professional roles and construct their emotional identities (Zembylas, 2005).

In addition, four participants shared emotionally charged experiences that illustrated the exhausting and stressful nature of teaching. These accounts revealed the challenges of maintaining composure amidst personal struggles, student disengagement, and classroom disruptions, emphasizing the significant effort required to manage emotions while fulfilling teaching responsibilities.

Xavi and Ben described the emotional resilience needed to conceal feelings of sadness and helplessness from their students. Ben, while dealing with an illness, masked his physical weakness with an energetic facade, while Xavi, recovering from a traffic accident, had to set aside his distress to fulfill his teaching duties. Reflecting on his experience, Xavi explained that "despite personal challenges like a traffic accident and insurance issues, I set aside my emotions to greet my students with, 'Hello, guys, how are you? Let's have the exam,' while feeling overwhelmed inside." Xavi's reflection underscores the challenge of maintaining professionalism amid personal adversity, showcasing the balance between internal emotional struggles and external expectations. The experiences of Xavi and Ben, who managed personal challenges

while maintaining composure, reflect Schutz and Pekrun's (2007) characterization of classrooms as emotionally charged environments, exemplifying the broad range of emotions teachers must navigate.

Martha commented on the intensity of dealing with disruptive students:

> The students were as challenging as the Chucky doll from the horror movies. There were times when I felt like leaving in tears, but I refused to let them see me defeated. It seemed like they were testing limits, pushing to see how far they could go. In those moments, I had to take a deep breath, control my emotions, and ensure my frustration wasn't visible. It required a deliberate effort to stay composed and not let the situation overwhelm me. (Martha)

Her experience highlights not only the stress and frustration associated with managing difficult behaviors but also the emotional labor required to maintain composure and professionalism. This resonates with the findings of Chang (2020) and Sutton (2004), who argue that successful emotional management is critical for teacher well-being and classroom success.

Axel, on the other hand, described the subtle battle he fought against apathy, induced by student disengagement. His account emphasized the emotional energy involved in sustaining motivation and fostering a dynamic learning environment. As Pekrun (2021) notes, teachers' motivation can be shaped not only by positive emotions, but also by their ability to manage and overcome emotionally draining situations.

4.3 Influence of Concealed and Openly Expressed Emotions on Motivation Among Ecuadorian English Teachers

4.3.1 The Effect of Positive Emotions on Teachers' Motivation. All interviewees agreed that experiencing positive emotions increased their motivation to teach English. Teachers described how displaying emotions such as joy, satisfaction, or pride positively influenced their students and, in turn, invigorated their own commitment to the profession. These findings confirm the central role that positive affect plays in energizing and sustaining teachers' motivation, as supported by Frenzel et al. (2009), who found that teacher enjoyment enhances both classroom climate and student motivation.

Xavi described this phenomenon as follows:

> I feel good in class, which reflects in my teaching style. I create a learning environment where mistakes are opportunities, showing positive emotions and encouraging informal interaction, despite students addressing me formally as 'teacher' or 'professor.' This enhances my motivation to teach. (Xavi)

George stated that his motivation increases when students go the extra mile

and exceed his expectations. Observing their enthusiasm for challenging tasks fuels his desire to continue innovating his teaching methods. Similarly, Ben reflected on a conversation with a former student who told him that he had inspired her to become an English teacher, reinforcing his long-term sense of purpose and emotional investment in teaching.

Eric described how his students' creativity and enthusiasm not only affirmed the value of his instructional techniques but also renewed his passion for teaching. This reciprocal flow of positive energy between teacher and students is echoed in the work of Moskowitz and Dewaele (2021), who emphasize the contagious effect of teacher happiness on student motivation and engagement.

These findings align with broader research showing that positive classroom atmospheres, built through humor, encouragement, and emotional openness, contribute to teachers' sense of efficacy and motivation (Thùy & Hương, 2024). They also resonate with MacIntyre and Vincze's (2017) view that positive emotions strengthen motivational mechanisms and sustain long-term engagement in educational contexts.

4.3.2 The effect of Negative Emotions on Teachers' Motivation. Eight out of ten participants reported experiencing negative emotions such as anger, frustration, and helplessness, particularly in response to student disengagement. While most teachers concealed these emotions, they acknowledged that such experiences could reduce their motivation. These findings reflect Pekrun's (2021) assertion that intense emotions—both positive and negative—can influence professional behaviors and motivational trajectories in teaching.

Xavi referred to the resilience needed to teach groups that evoked negative emotions in him, while George illustrated how demotivating it can be when his efforts are unappreciated by students, expressing the emotional toll it can take:

> Feeling unmotivated can happen when you've put a lot of effort into preparing a session, aiming for it to be as engaging as possible, only to be met with apathy from your students. It's like they're signaling, 'This doesn't interest me,' right from the start. Naturally, this stirs up frustration, and part of you wishes you could just tell those disinterested students to leave. Or, there's the temptation to disengage and adopt a 'why bother?' attitude if they seem not to care. (George)

Martha linked her demotivation to a broader cultural context, expressing frustration at the lack of societal emphasis on English learning in Ecuador. These reflections support the view of Méndez (2011), who found that teacher motivation is highly sensitive to environmental and contextual factors, especially student engagement and institutional culture.

Despite these challenges, teachers described their efforts to remain committed. The deliberate concealment of negative emotions described here aligns with Hochschild's (1983) concept of surface acting, and with Sutton's (2004) argument that such regulation is often necessary to maintain the learning environment. Nevertheless, participants acknowledged that sustained exposure to emotionally taxing classroom situations required ongoing reflection and adaptive strategies.

4.3.3 Adaptive Strategies and Inner Reflections. Confronted with these challenges, teachers like Xavi and Rose engaged in significant introspection and strategy adjustment. They actively sought to understand their students' attitudes and adjust their approaches accordingly:

> Facing anger in the classroom hasn't led me to give up but has instead made me reflect on the diverse types of students I teach. It has prompted me to think about strategies to effectively handle similar situations in the future. It's crucial to develop approaches that enhance our ability to work together constructively. (Rose)

Similarly, Martha and Renata drew motivation from the enthusiasm of engaged students, which helped mitigate the impact of negative emotions.

These findings closely align with the theoretical perspectives outlined in the literature review. Schutz and Pekrun (2007) emphasized how emotions profoundly influence teacher-student interactions and academic achievements. The resilience displayed by teachers in navigating their emotional landscapes mirrors the processes discussed by MacIntyre and Vincze (2017), who observed that intense emotions, while challenging, can enhance motivation by prompting strategic and reflective practices. Moreover, Méndez (2011) highlighted the critical role of responsive teaching, noting that a supportive attitude and positive classroom environment can sustain motivation even in the face of negative emotions. Pekrun (2021) further emphasized that teaching often evokes intense emotional responses, which, when effectively managed, can influence professional behaviors and sustain motivation. Together, these insights underscore the transformative potential of emotional management in fostering both teacher resilience and positive educational outcomes.

5 Conclusion

This study examined two central aspects of Ecuadorian EFL teachers' emotional experiences: the emotions they consider appropriate to display or conceal in the classroom, and how these emotions influence their motivation to teach.

Findings showed that positive emotions—such as joy, pride, and enthusiasm—were seen as essential for promoting student engagement and a positive classroom

climate. Negative emotions like frustration or anger were generally suppressed to maintain professionalism. These results confirm earlier research on emotional display rules and emotional labor (Hochschild, 1983; Sutton, 2004; Taxer & Frenzel, 2015), and they highlight how these dynamics are shaped by institutional expectations and cultural values in Ecuador.

In terms of motivation, participants described how positive emotional experiences strengthened their sense of purpose and teaching commitment. In contrast, repeated experiences of apathy or lack of student engagement led to frustration and demotivation. However, many teachers responded with emotional regulation and reflection, showing resilience. These findings align with MacIntyre and Vincze's (2017) and Pekrun's (2021) observations on the importance of emotional self-regulation in sustaining motivation.

The significance of this study lies not only in confirming patterns described in previous research (e.g., Frenzel et al., 2009; Zembylas, 2005), but also in offering context-specific insights that expand our understanding of how emotions operate in Latin American EFL settings. These findings suggest that language teacher education should include emotional competence as a core component. Preparing teachers to understand, regulate, and reflect on their emotional experiences can enhance motivation, reduce emotional exhaustion, and improve both teaching effectiveness and classroom relationships.

While this study offers valuable insights, its focus on a single cultural context may limit the transferability of the findings to other regions. As qualitative research does not aim for statistical generalization, this limitation does not compromise the validity of the study but highlights the importance of context in interpreting emotional experiences. Future research could explore how these dynamics unfold in different educational and cultural settings through cross-cultural comparisons or studies involving more diverse samples.

Moreover, research by Chen and Tang (2024) and Richards (2022) emphasizes the role of institutional support in helping teachers manage emotional challenges and build resilience. Further investigations could examine how working conditions, emotional support systems, and professional development programs impact EFL teachers' emotional well-being and long-term motivation across various contexts.

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Appendix A

Interview schedule (Samples)

1. Participant's biographical information:

1. What is your name?
2. How old are you?
3. What is your gender?

Male. ( )

Female ( )

I prefer not to tell ( )

Other ( )

4. What is your 3rd level education?
5. What is your 4th level of education?
6. Which international English exam have you taken to certify your language proficiency?

Cambridge Assessment English. ( )

IELTS ( )

TOEFL ( )

TOEIC ( )

Pearson Test of English Academic ( )

Other ( )

7. Which of the following best describes your English level?

A1. ( )

A2. ( )

B1. ( )

B2. ( )

C1. ( )

C2. ( )

8. What is your nationality:
9. How many years of experience do you have in the educational field?

10. Have you worked in:

public elementary school. ( )

private elementary school. ( )

public high school. ( )

private high school. ( )

public university. ( )

private university ( )

11. Where do you currently work?

public elementary school. ( )

private elementary school. ( )

public high school. ( )

private high school. ( )

public university. ( )

private university ( )

12. What age group do you usually teach?

13. On average, how many students are in your class?

2. Interview Guide: Emotional Expression in the EFL Classroom

1) To begin the interview, can you tell me a little about yourself—just a brief introduction so I can get to know you better?

2) Can you tell me a bit about your experience teaching English? How do you feel about being a teacher, and what motivated you to choose this profession?

3) When did you start formally teaching English and where?

4) How many hours per week do you teach English?

5) Can you describe the type of students you work with?

5.1. How are they?

5.2. Do they want to learn English?

6) Can you describe the general feelings or emotions that you think teachers have to hide in the classroom? Why is that?

7) What general feelings or emotions do you think teachers can display freely in the

classroom? Why?

7.1. Are there any formal or informal rules in your workplace that influence which emotions teachers are expected to show or hide in the classroom?

8) Can you describe one or more events that happened in your foreign language classes that you were teaching in which you had to hide your feelings (emotions).

8.1. What were these feelings or emotions? Why did you feel the necessity to hide them?

8.2. In relation to the previous question, please answer the following: How did this event(s) affect your motivation to teach English? Why?

9) Can you describe in as much detail as possible one or more events in your foreign language classes in which you as a teacher allowed yourself to show your emotions?

9.1. What were these feelings or emotions? Why did you feel free to express these emotions?

9.3 In relation to the previous question, how did this event (or events) affect your motivation to teach English? In what ways?

10) Some teachers struggle to control their emotions in the classroom. For instance, if their students did not hand in their assignments on time or cheat in class, teachers become very angry and start lecturing their students? What is your perception of this kind of emotional response?

11) Do you think that hiding negative emotions can affect teachers somehow? Why?

12) What are the advantages or disadvantages of displaying pleasant emotions in the classroom?

Why?

13) How can teachers know which emotions are good or bad to display or hide in the classroom?

14) Teaching can be an emotionally demanding job. Do you consider that teachers should get some training or attend workshops where they learn about emotions that can be shown or hidden in the classroom and how they might affect their teaching? Why? Why not?

15) Do you use any strategies to help you regulate your emotions? If so, would you mind sharing them?

16) Is there anything else you would like to share with me in relation to the topic of my research, i.e., hiding and/or showing your feelings while teaching your English classes?

Thanks for your answers.

Appendix B

Informed consent form for interviews

Title of study: Teacher's emotion in the EFL classroom

Researcher: Nury Estefanía Belduma.

Email: estefhamar@student.elte.hu/ beld.estefany@gmail.com

Background and purpose of the study:

You are invited to participate in a research study about emotions in English language teaching in Ecuador. This study seeks to explore how teachers experience and manage emotions in the classroom and how these emotions influence their teaching and motivation.

Your Participation:

I am inviting you to participate in this interview because your insights as an English teacher are valuable to my study. You will be asked about your experiences teaching English as a foreign language. Participation is voluntary, and you may withdraw at any time without any consequences.

Confidentiality:

The interview will be conducted virtually via Zoom and will be recorded. All information will remain anonymous. Your name will not appear in any report or publication; instead, pseudonyms or codes reflecting gender and nationality will be used for identification.

Handling and archiving of the Participant's data: The consent forms, original video recordings, transcriptions, and processed data, encompassing participants' personal information, will be meticulously stored within a fortified folder located in the precincts of my laptop's designated personal documents repository.

Expected Duration and Procedures: The interview will approximately last 30-45 minutes. It will consist of a series of questions related to your experiences in teaching English as a Foreign Language.

Foreseeable Consequences of Declining/Withdrawing: There are no negative consequences if you decide not to participate or if you choose to withdraw from the study at any point.

Potential Risks and Discomforts: There are no anticipated risks or discomforts associated with participating in this study beyond those encountered in daily life.

Prospective Research Benefits: While there are no direct benefits to you, your participation will contribute valuable information to our understanding of language learning experiences in Ecuador.

Limits of Confidentiality: Confidentiality will be maintained to the extent permitted by the

technology used.

Incentives for Participation: There are no financial incentives for participating in this study.

Contact Information: If you have questions about your rights as a research participant, you may contact the researcher: Nury Estefanía Belduma (estefhamar@student.elte.hu)

Opportunity for Questions: You have the right to ask questions about the study both now and during the course of the study.

Consent for Video Recording: I have informed you that this interview will be videorecorded for research purposes. By signing this consent form, you are giving your explicit permission for your image and voice to be recorded. These recordings will only be used for this research study and will be treated with the utmost confidentiality.

Privacy Assurance: I assure you that all personal information collected during this study will be kept private and confidential. Only I will have access to the data, which will be used solely for this research. Any publications or presentations will use pseudonyms or codes and will not include any identifiable information.

If you agree to participate in the interview, please sign the form below.

Thank you very much.

I have read and understood the above information. I voluntarily agree to participate in this study.

I am aware that I can discontinue my participation in the study at any time.

Date:

Name of the participant:

Signature:

_____

6

Retrofitting an Analytic Rating Scale Used for Integrated EAP Assessment

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Abstract

Because language proficiency is a core construct of applied linguistics, language assessment is a central pillar of the discipline. The information typically collected about language proficiency for research, educational, or program evaluation purposes (Bachman & Palmer, 2010) must be dependable because the decisions made based on it have consequences for all the stakeholders (Messick, 1998; Shohamy, 2001). This study investigated the analytic rating scale used in a post-entry, criterion-referenced, integrated EAP assessment in a tertiary English-medium education program. The educational context for which it was developed has changed markedly; therefore, reviewing the analytic rating scale became imperative, especially with regard to practicality and consequential considerations. The original scale was deconstructed into a scoring guide containing 28 aspects, which raters representing the new context were trained to use. The scores obtained through the independent rating of 30 scripts were analysed using non-parametric statistical tests. The results revealed problematic aspects, prompting a reduction in the number of aspects to 18. The findings have practical implications for instruction and assessment.

Keywords:

post-entry EAP assessment, analytic rating scale, assessment retrofitting, consequential validity

1 Introduction

The current study focuses on the analytic rating scale used to rate guided summary scripts written in the post-entry, integrated English for academic purposes (EAP), criterion-referenced test administered as part of an academic skills course. The course and the EAP test were developed to teach and assess a set of fundamental

EAP abilities, strategies, and skills operationalised with a reading-into-writing guided summary writing task (Tankó, 2019, 2024). Described in terms of Bloom's revised 1956 taxonomy (Anderson et al., 2001), the guided summary writing task requires students to engage in summarisation and intratextual synthesis (Tankó, 2022a), relying on the cognitive dimensions of remembering, understanding, applying, analysing, evaluating, and creating content. The guided summary writing task, as a teaching and assessment task, is intended to prepare students for the more complex task of intertextual discourse synthesis (Tankó, 2022a).

The EAP test was developed in the mid-2000s and first used operationally in 2006. The context for which it was produced was markedly different than the one in which the test is used today. The academic skills course used to be taught and tested by experienced non-native and native English-speaking faculty, who were not only highly proficient users of academic English but were also regularly trained and re-trained, monitored for assessment quality assurance purposes, and were practicing and experienced EAP specialists—the latter in the sense that they taught courses and published applied linguistics research. Furthermore, the students admitted to the university at the time had a better overall command of general English, with most meeting the minimum upper intermediate level (corresponding to the CEFR B2 level) required for starting the development of EAP proficiency (Kirkland & Saunders, 1991).

Currently the course is taught and the test is marked by only some experienced faculty, with a large proportion of the courses being taught by graduate students who are themselves novice academic discourse processers, focusing primarily on the completion of their PhD courses and their own research projects that seldom overlap with EAP. Moreover, the faculty receive less assessor training due to previous complaints regarding the attendance of training sessions, which caused unwanted tensions; some also demonstrate reduced tolerance for scorer monitoring, which is a common quality control procedure in assessment that serves stakeholder interests. Others have predominantly receptive experiences with EAP discourse and genres, as they are not contractually expected to publish. Additionally, there has been a marked shift in the test-taking cohort of students. About half of them can now be admitted to the English programme without a B2-level language certificate (Educational Department, 2024, 2025).

These factors, some of which clearly originate from a lack of appropriate funding, have resulted in an observable lack of consistency in assessment that needs to be addressed with an investigation into the operation of the academic skills test within the changed assessment context. A first step in this process is examining the functioning of the rating scale through analysing the reliability of scoring conducted with a sample of raters representative of the current rater population. The aim of this assessment retrofitting (Fulcher & Davidson, 2009) project is to simplify the assessment process. This is to be realised through the re-adjustment of the analytic rating scale to the realities of the new context by means of streamlining and the alleviation of its cognitive

demands. An improved definition of the assessment criteria and a reduced number of rating decisions to be made are expected to make the assessment dependable, which is an essential requirement given the consequences that the assessment has for all stakeholders involved (Messick, 1998; Shohamy, 2001).

2 Theoretical Background

The scoring of written performance samples can be global (holistic) or analytic and is carried out with the use of band scales designed to be suitable for placing test-taker performance on a continuum according to ability level (Heaton, 1989; Hughes, 2002; Tankó, 2005; Weigle, 2002; Weir, 1993). Raters who use a holistic rating scale award a single score or mark for a performance sample based on an overall impression of a script. Although the usually detailed band descriptors in global scales include several aspects of the expected performance sample—such as organisation, grammar, or style—they are applied without analysis; that is, scripts are rated based solely on impression.

In contrast, analytic marking requires the use of a rating scale that allows raters to award separate scores for different features of the expected written product. The components of the construct of interest are operationalised by criteria, also called traits (cf. Hamp-Lyons, 1991), each of which functions as a sub-scale within the overall scale and is subdivided into a number of behavioural levels corresponding to qualitatively different performances, usually ranging from incompetence to mastery. Each behavioural level is described for each criterion by a band descriptor that specifies the aspect(s) of the performance sample that raters need to take into consideration. For example, as discussed in the Methods Section (cf. Analytic rating scale), the scale investigated in this study features five main criteria the majority of which are subdivided into sub-criteria and differentiate four behavioural levels. The granularity of scoring criteria can complicate their use; therefore, as Fulcher (2010) argued, "if complex scoring criteria are to be considered for operational use, they need to be carefully piloted with potential raters" (p. 211).

Fulcher (2010) differentiated a non-empirical and four empirical methods of rating scale design. Experienced language teachers and testers use the *intuitive and experiential method* to create a scale based on their expertise and, informed by experience, may later revise its descriptors. The *performance data-based method* requires the analysis of actual samples of discourse produced by test takers. The verbal descriptors written for the scale are derived from the characteristics of the samples elicited with test tasks. Although Fulcher makes no mention of this, the method is not informed by theory, the inclusion of which has been cogently argued to be unexpendable for justifiable scale design (Knoch, 2011; McNamara et al., 2002). Using the *empirically derived, binary-choice, boundary definition method*, expert judges categorise elicited language samples into different levels based on key features of performance. Fulcher himself highlighted several drawbacks of this method; for example, a new decision point scale should be

designed for each task type, and the method does not rely on theoretical models of language use. However, an unmentioned but major problem with this method is that it is very much sample dependent. Every time a sample of performances is drawn from a cohort of test takers with a different range of ability levels, a different scale will be constructed. This may be the reason why Fulcher recommends its use for classroom assessment, where the stakes are lower. The method used for *descriptor scaling* during the construction of the CEFR scales requires the creation of a pool of descriptors taken from a large number of scales, which are then classified into types of communicative activities, divided into levels, rated according to perceived difficulty, and scaled using Rasch analysis based on the difficulty estimates. In addition to the debatable criticism formulated by Fulcher that the CEFR scales lack a theoretical foundation—given that at least some of the descriptors used for their construction were most likely drawn from theory-based scales—what makes this method difficult to apply in practice are its pronounced resource demands. The final method, *performance decision trees*, differs from the others only in that it combines the second and third methods.

The analytic rating scale investigated in this study was constructed empirically in the mid-2000s using an enhanced *performance data-based method*. The improvement of the method was twofold: First, the construction of the scale was driven by a thorough review of the literature on summarisation conducted in order to identify the salient features of the process and its products. Secondly, not only language learners but also academic skills tutors produced sample scripts that were analysed for the drafting of verbal level descriptors. The tutors, including both native and non-native speakers, were involved so as to counter the distorted, incomplete sampling effect caused by solely relying on learner scripts, which may not represent the full range of performance.

Raters who use an analytic scale award a separate score for each criterion against which they judge a test taker's performance. By doing so, they produce sets of part scores that most often are then transformed into a composite score. Bachman and Palmer (2010) differentiated two ways in which this can be done. If high scores obtained by a test taker on some criteria can compensate for low scores obtained on others, the *compensatory* approach is used for the production of the composite score. Contrarily, if a non-compensatory approach is adopted, a minimum level of ability is set for each criterion, and the high scores obtained by a test taker on some criteria cannot compensate for low scores. Given the high-stakes nature of the assessment, the analytic rating scale in the focus of the current study is a non-compensatory rating scale in which a minimum level of mastery of 1 point was set for each criterion, for which a maximum of 3 points can be awarded (cf. the description of the rating scale in the Methods Section).

A scale that has been constructed and validated for a given context may need to be reconstructed if the characteristics of the context change markedly, as was the case with the academic skills test for which the scale investigated in this study was created. Fulcher and Davidson (2009) differentiated two types of test retrofitting: The

first is the *upgrade retrofit,*

> the purpose of which is to make an existing test more suitable for its original stated purpose, by ensuring that it meets new or evolving standards, or uses new technologies to make the test more efficient. For example, as time passes our knowledge of the target domain grows, and this may require the inclusion of new item types; a situation may arise in which it is necessary to increase test reliability; or there is a significant shift in the test taking population that requires test difficulty to be adjusted. (p. 124)

The second type is the *change retrofit*, in which a "test is altered to meet a completely new purpose for which it was not originally intended, or to be used with users who were not envisaged in the original statement of test purpose" (p. 124). The current study is a test retrofitting project motivated by the changes that occurred in the test-taking population as well as in the personnel who have recently been teaching and testing the students enrolled in academic writing courses.

In the process of assessing extended written production, rater behaviour is of crucial importance in addition to the rating scale. The scores awarded to scripts must be independent of factors such as the time of test administration, task content, and raters (Alderson et al., 1995; Bachman & Palmer, 2010; Heaton, 1989; McNamara, 1996). It has been suggested that in order to achieve high rating reliability, especially with holistic rating scales, a script should be scored four times, that is, by four independent scorers (Heaton, 1989; Hughes, 2002). This raises several practicality concerns, and the standard best practice, especially with analytic rating scales, is that a script is independently scored twice (Weir, 1993). In order to guarantee consistency in rating, scorers must be thoroughly familiarised with the rating scale and trained (as well as regularly re-trained) with benchmarked scripts to apply the criteria reliably (Tankó, 2005; Weigle, 2002). Furthermore, in order to ensure rater reliability, the type of training must be tailored to the assessment context, raters need to be monitored (e.g., with inter-rater reliability checks), and feedback is to be provided (Alderson et al., 1995; Hymp-Lyons, 1990). The background and expertise of raters need to be taken into consideration, raters themselves must attempt the assessment tasks, and, notably, they must meet the expected standards of accuracy (Pill & Smart, 2021). In the case of integrated, domain specific reading-into-writing tasks—as is the case with the guided summary writing task—raters should be EAP specialists (Weir, 1993).

The concern with scoring reliability is directly related to validity. As Alderson (1991) noted, "I have long found it difficult to see that item homogeneity (internal consistency) can be seen as a matter of reliability, rather than as one of validity . . . parallel form reliability is simply concurrent validation" (pp. 61–63). Bachman and Palmer (2010) also included reliability as one of the components of the Assessment Use Argument assessment justification framework. The justification argument is a chain of arguments (cf. Tankó, 2021 for an argumentation-theory-focused analysis) consisting of four separate arguments.

The consistent use of the rating scale and the consistency of the scoring are both key conditions for the production of reliable assessment records. If the assessment records are not reliable, the interpretations derived from them, the decisions made on the basis of the interpretations, and the consequences of the assessment become jeopardised. The chain of justification reasoning is broken if the assessment is inconsistent, and Bachman and Palmer (2010) claimed that if the chain of arguments is broken, the assessment becomes not only invalid but also unfair. This affects the consequential validity of the assessment (Messick, 1989, 1998; Shohamy, 2001), namely, the actual social consequences of its use, such as its washback effect on classroom practices.

2.1 Main and Sub-research Questions

The main research question of the study was the following:

- How can the measurement accuracy of the analytic rating scale designed for the assessment of guided summary performance samples be improved within the new, challenging institutional context?

Three sub-research questions were also formulated:

1. How reliable is the rating of scripts using the analytic rating scale?
2. Are there significant differences between the scores awarded by raters?
3. Are there any significant positive correlations between the scores given to the various aspects of the scripts?

3 Methods

The following procedures were followed during the collection and analysis of the data in order to answer the research question.

3.1 Research Participants

Three raters participated in the study. The expert rater was an experienced faculty member who had been actively involved in the development of the rating scale and had been rating guided summary scripts since the introduction of the test. The two graduate student raters were enrolled in the PhD programme from which students are regularly recruited to teach the academic skills course during which the investigated academic skills test is administered. The two students, selected through purposive sampling, were equally inexperienced regarding the academic skills course and the assessment task. They had not taught the course before, but both had prior tertiary teaching experience. The English proficiency of one of the students, which was evident during the course, was stronger, but both represented the English proficiency levels of the graduate students recruited to teach

and test academic skills. Both students had prior teaching and assessment experience, and—based on the time and quality of the effort they invested in the completion of the tasks and in the familiarisation with the investigated assessment—both were equally dedicated to understanding the assessment process, task, and rating scale.

3.2 Assessment Tasks and Scripts

The data collection tool was the integrated (i.e., reading-into-writing) guided summary writing task developed for summative assessment purposes and administered as part of the investigated academic skills test. The task engages several academic language abilities in recursive phases, namely reading, summarisation, paraphrasing, and writing. It features an authentic reading passage excerpt of about 700 words, typically selected from a source written for undergraduates covering different aspects of a general academic topic that students may encounter during the first three years of their studies (cf. Tankó, 2024 for a detailed description of the guided summary writing task and a worked sample). In order to complete the task, students have to locate, summarise, paraphrase, and write up, in the form of a complete paragraph of about 130 words, 5–6 thematically related aspects of the topic discussed in the reading passage. The aspects to be selectively identified are specified in the task instruction.

The scripts used in this study were elicited using two guided summary writing tasks selected from the coursebook used in the Academic Skills courses (Tankó, 2019). A detailed list of the content points to be included in the summaries were provided for each task, with a clear indication of when a content point was to be considered fully reproduced. The task used in the first familiarisation phase was a sample task included in the publicly available specification for test takers. The scripts rated in this phase were anonymised student scripts that had been written under test conditions in academic skills courses. The students attending the course were informed that their scrips would be used for teaching and training purposes, with no possibility to identify the author.

The task used in the second familiarisation and data collection phases was a live assessment task administered as part of the 2021 academic skills test. Two sets of scripts elicited with the test were selected through purposive sampling: A smaller subset of scripts were selected from those written during the live test by the students of a non-native speaker faculty member who was also experienced in teaching the academic skills course and in rating guided summaries. These anonymised scripts were used during the second familiarisation phase as pre-rating training materials. A larger subset of 30 scripts was further selected and anonymised for the actual data collection. These scripts were written by two groups of students, with 15 students in each group. The groups had been taught by two experienced faculty members, namely a native speaker and a non-native speaker academic skills tutor, both of whom had taught the course and assessed guided summary scripts for several years. The scripts were selected from these tutors so as to control for potential unwanted variation in quality due to course input.

3.3 Analytic Rating Scale

The rating scale developed for the assessment of guided summary scripts is a non-compensatory analytic scale. The version of the scale investigated in this study consisted of ten subscales organised under the categories of Content, Paraphrasing, Texture, Grammar, and Form (cf. Figure 1). The total score that could be obtained was 26 points.

Figure 1

Components of the Non-compensatory Analytic Scale

Main components	Sub-components	Points
Content →	Content point presence and quality	0–3
	Irrelevant, additional, and repeated information	0–3
Paraphrasing →	General quality paraphrasing	0–3
	Distance from source text	0–3
Texture →	Completeness	0–3
	Coherence and cohesion	0–3
	Punctuation	0–3
Grammar		0–3
Form →	Paragraphing	0–1
	Length	0–1

3.4 Rating Guide

Given that some subscales of the analytic rating scale covered different components of the construct, for a fine-grained analysis the components were separated and included in a rating guide. For example, the "Irrelevant, additional, and repeated information" subscale was divided into three assessment aspects. The rating guide named, defined, assigned a correction symbol to, and specified a scoring method for each aspect. It also included a column for the rated scripts where the raters could record scores.

The rating guide was modified repeatedly over the course of the familiarisation phases. The original 28 aspects were eventually reduced to 24 with the deletion of redundant aspects, the merging of those that the raters found difficult to apply, and the addition of one that was found to be missing. The finalised rating guide was then used by the raters to record the scores awarded independently for the 30 guided summary scripts.

3.5 Procedure

To introduce the integrated assessment task and the assessment process to the graduate students, in the first familiarisation phase the students themselves wrote guided summaries based on the sample task. Their scripts were analysed, rated, and discussed. During this process, the graduate students were introduced to the constructs that the task operationalises by means of the scale and to the methods used to rate the scripts. Additionally, all the participants individually rated scripts written on the same task by academic skills students. Following the standard procedures of rater training (Alderson et al., 1995; Tankó, 2005), the scores awarded and recorded in the rating guide were compared, and a consensus-building discussion was conducted. One outcome of the discussion was a revised rating guide.

In the second familiarisation phase, scripts written by students during the live test in response to the second guided summary writing task were independently rated, the scores were recorded in the rating guide, and the results of the rating were discussed to enhance consensus and address the issues that had emerged during the rating and recording of the scores. As a result, the rating guide was further specified, and some overlapping categories were merged. This concluded the rater training, which was markedly more thorough and systematic than the trainings that can be and are typically provided to tutors in non-research, regular teaching contexts. The raters then proceeded to rate the 30 scripts independently. Finally, following the independent rating of the summary scripts, the graduate student raters took part in a debriefing session during which they discussed their rating experiences and the difficulties they had encountered during rating. Additionally, they were presented with the sets of scores awarded by the raters on the various aspects of the scripts and were asked to indicate any instances where they would change their individual scores. This provided further insights into the uncertainties they had faced during rating.

The sets of scores were then subjected to statistical analyses to determine for which aspects the raters awarded similar or different scores and to determine whether the findings were statistically significant. During the preliminary analysis of the data, the Shapiro-Wilk normality test—selected due to the small sample size ($n < 50$)—showed that the scores were not normally distributed. Furthermore, Levene's test revealed that the assumption of homogeneity of variances was not fulfilled ($p < 0.05$) in the case of 14 aspects.

Three statistical tests were used to analyse the data, which provided different complementary insights into the rating process and functioning of the assessment aspects. To measure the agreement between the raters, Krippendorff's alpha (αK) reliability coefficients were calculated using a macro written for SPSS (Hayes & Krippendorff, 2007). This reliability measure indicates perfect agreement with a value of 1, no agreement beyond chance with a value of 0, and inverse agreement with negative values. Given that the data were not normally distributed, a Kruskal-Wallis H test was conducted to determine whether there were significant differences between the scores awarded by the three raters on the various assessment aspects. Moreover, because Levene's test showed that the data did not meet the homogeneity of variance assumption

required for a Kruskal-Wallis H test, the test was used to compare mean ranks (Vargha & Delaney, 1998). Finally, the Spearman rank-order correlation was calculated to determine the strength and direction of associations between the scores of rater pairs.

4 Results and Discussion

The results of the analysis are presented in the order of the sub-research questions. The analysis of the data progresses from a coarse- to a fine-grained level, allowing for a better understanding of the assessment process and the operation of the assessment aspects when used by inexperienced raters.

4.1 Reliability of the Rating

To determine the reliability of the rating—that is, to determine how much the scores awarded to the summary scripts can be trusted to reflect their quality—Krippendorff's alpha (α_K) coefficients were calculated for each assessment aspect. As shown in Table 1, no indices could be calculated for two aspects, namely Aspects 06 and 08 because there was no variation in the scores. This was due to the straightforward nature of both aspects, which made it easy for the raters to make decisions that were consistent with those of their peers.

The aspects for which indices could be calculated show that the overall reliability of the ratings was not satisfactory. The expected reliability threshold for a variable is $\alpha \geq .800$ to indicate satisfactory agreement. Any indices between the values of .667 and .800 show merely moderate agreement and signify divergent rating (Krippendorff, 2019). Only Aspect 24 (Length) had a value higher than .800.

There was moderate agreement in the case of three aspects, listed in decreasing order of their respective α_K values: Aspects 17, 07, and 01. Two of these aspects are not especially difficult to rate. The topic sentence, for instance, can be easily identified with the help of the signal phrase required for an indirect citation like a summary, as well as with the aid of its distinctive position, structure, and rhetorical function. Similarly, stretches of text copied verbatim from the source—for example, technical terms—are also relatively easy to notice through comparison of the source and target texts. The lowest agreement index was found in the case of Aspect 01. Given that the raters were provided a complete list of content points that had to be included in the summary, the identification of this propositional content should not have caused problems. However, this was not the case, as confirmed by further analyses of the score sets.

There was poor agreement between the raters in the case of 13 aspects. In decreasing order of their α_K values, these included Aspects 04, 23, 19, 03, 05, 21, 02, 18, 13, 11, 20, 22, and 09. These aspects with less than acceptable inter-rater agreement can be categorized as content-related (Aspects 02, 03, 04, and 05), rhetorical (Aspects 18, 19, 20, and 21), language features (Aspects 09, 11, and 13), mechanics (Aspect 22), and form (Aspect 23).

Table 1

Krippendorff's Alpha Coefficients for the Guided Summary Assessment Aspects

Aspect	α_K [i]	LL95%CI[ii]	UL95%CI
01 Content points included	.7151	.5860	.8319
02 Extent of content point reproduction	.4365	.2321	.6150
03 Distorted content	.5071	.3465	.6577
04 Irrelevant content	.6309	.5088	.7556
05 Added content	.4872	.3280	.6238
06 Repeated content	-	-	-
07 Unwarranted lift of lexis or structures	.7323	.5431	.8900
08 Use of direct quotations	-	-	-
09 Lexical choices (meaning)	.1559	-.1714	.4555
10 Variety of lexis	-.0666	-.3350	.1912
11 Accurate lexis (form)	.2341	-.3021	.6170
12 Style of lexis	-.0349	-.8168	.6090
13 Syntactic choices (meaning)	.2383	-.2517	.6428
14 Variety of syntactic structures	-.1470	-.3773	.0866
15 Accurate syntax (form)	-.0255	-.2606	.2301
16 Style of syntax	.0001	-1.0000	1.0000
17 Topic sentence	.7678	.6133	.8914
18 Unity	.3197	.0549	.5845
19 Concluding sentence	.5605	.3698	.7386
20 Coherence	.1958	-.1125	.5063
21 Cohesion	.4770	.2591	.6782
22 Punctuation	.1609	-.1185	.4172
23 Paragraphing	.5818	.3308	.7909
24 Length	.9283	.8207	1.0000

i. Units: 30; Observers: 3; Pairs: 90; Aspects 06 & 08: No variation in the scores.
ii. As suggested (Hayes & Krippendorff, 2007), 10,000 bootstrap sampling distributions were calculated.

During the debriefing, the graduate student raters reported experiencing difficulties with the assessment of content-related aspects. Determining which content points were included was the least frequently encountered difficulty. However, both had problems, particularly the second graduate student, with the rating of added, distorted, and irrelevant content—that is, with the matching of the propositional content of the source text with that reproduced in the guided summary. This may indicate a (reading) proficiency issue that can be addressed with training.

Similarly, whereas both graduate student raters commented that rating unity was almost equally challenging, both, but more frequently the second graduate student rater, mentioned uncertainties concerning the rating of the quality of concluding sentences in addition to the identification of primarily coherence but also cohesion errors. The second graduate student made several changes to their coherence scores during the revision of the scripts in the debriefing session conducted subsequent to the individual rating. The insufficiently consistent rating of rhetorical features may indicate a lower level of rater awareness of these features of academic discourse that hindered the methodical recognition of lapses in their use. Accurate assessment of such rhetorical aspects can also be improved with training.

The weak agreement, primarily on punctuation and also on certain language features, indicates the inefficiently systematic recognition of issues with these academic text features, which may be due to English language proficiency and/or to the complexity of the rating task. During the debriefing phase, both graduate student raters noted particular difficulties with the identification of inaccurate lexis and punctuation. Yet again, this needs to be addressed through the selection and training of the raters, as also demonstrated by the unexpected lack of agreement concerning *Paragraphing*, an aspect which only requires the rater to eyeball the layout of the script for an assessment decision to be made. The second graduate rater noted having problems deciding when the last sentence of the summary was visually separated from the paragraph.

Finally, in addition to *Style of syntax*, for which there was no agreement between the raters other than what could be expected by chance, negative α_K values were found in the case of four aspects (Aspects 14, 10, 12, and 15). The negative values indicate systematic disagreement between the raters. Both graduate student raters reported experiencing difficulties with rating aspects related to style as well as the range of lexis and syntax, especially the second graduate rater and markedly in relation to Aspect 14 (*Variety of syntactic structures*). These two aspects can be most likely removed from the rating scale, as the inherent basic requirement of conciseness in a summary does not allow for an easily noticeable demonstration of range. While the task, as a consequence of paraphrasing, does require the use of forms that differ from those featured in the source text, which can serve as an indicator of lexical and syntactic control and range, control is arguably more obvious in summary writing (i.e., the communicatively effective and accurate rewording of parts of the source text).

The lack of consensus in the rating of Aspects 12 and 15 is unexpected. Grammatical correctness and lexical style are key characteristics of academic texts. The low agreement values indicate yet again the inefficient recognition of these (academic) text features, which is possibly due to English language proficiency and/or the cognitive demands of the complex rating activity. In fact, during the debriefing both graduate student raters observed that, upon reviewing their corrections, they failed in numerous cases to recognise inaccurate syntactic structures. Although markedly less frequently, they also admitted that they had failed to identify instances of informal lexis. These findings are already informative; however, for a more complete interpretation of the findings, a finer-grained analysis is necessary.

4.2 Differences between the Scores Awarded

Whereas the analysis of agreement revealed an overall lack of consensus between the raters, the interpretation of the findings necessitates the investigation of the specific aspects on which the raters disagreed and the more exact nature of the disagreements. The Kruskal-Wallis H Test (cf. Table 2) showed that the difference in the scores awarded by raters was significant in the case of 10 aspects.

Table 2

Assessment Aspects Where the Ratings Were Significantly Different

Aspect	χ^2	*df*	*p*
02 Extent of content point reproduction	10.225	2	.006
04 Irrelevant content	6.300	2	.043
09 Lexical choices (meaning)	8.339	2	.015
10 Variety of lexis	14.833	2	.001
14 Variety of syntactic structures	26.573	2	.000
15 Accurate syntax (form)	26.026	2	.000
18 Unity	6.112	2	.047
20 Coherence	12.697	2	.002
21 Cohesion	6.009	2	.050
22 Punctuation	10.174	2	.006

Table 3

Significant Differences in Aspects Assessed by Rater Pairs

Aspect	Rater[i]	*Mean Rank*	*p*[ii]	*Z*	η^2
02 Extent of content point reproduction	A	54.15	.004	3.194	.113
	C	36.35			
04 Irrelevant content	A	51.20	> .05	-	-
	B	36.57			
09 Lexical choices (meaning)	A	51.02	.013	2.855	.091
	C	38.92			
10 Variety of lexis	A	56.50	.001	3.639	.147
	C	38.17			
	A	56.50	.011	2.911	.094
	B	41.83			
14 Variety of syntactic structures	A	60.00	.000	5.148	.294
	B	31.82			
	A	60.00	.015	2.798	.087
	C	44.68			
15 Accurate syntax (form)	A	51.07	.000	3.957	.174
	C	30.07			
	B	55.37	.000	4.767	.252
	C	30.07			
18 Unity	A	50.07	.048	2.411	.065
	B	39.55			
20 Coherence	A	50.07	.006	-3.070	.105
	B	36.50			
	C	49.93	.006	3.101	.107
	B	36.50			
21 Cohesion	A	49.25	> .05	-	-
	B	38.33			
	C	48.92			
22 Punctuation	A	50.82	.11	2.576	.074
	C	36.53			
	B	49.15	.030	2.917	.095
	C	36.53			

i. A & B = graduate student raters 1 & 2, C = expert rater; ii. Adj. Sig. < .05

The pairwise comparisons (cf. Table 3 on the previous page) further revealed that there were no significant differences between the scores awarded by any two raters in regard to Aspects 04 *Irrelevant content* and 21 *Cohesion*. However, significant differences were identified in the case of the remaining eight aspects. Despite the thorough pre-rating training, the mean ranks show that the graduate student raters awarded higher scores, indicating that they identified significantly fewer shortcomings in the scripts when rating these aspects. The first graduate student rater identified significantly fewer content reproduction, lexical choice, syntactic accuracy, as well as syntactic and lexical range problems than the expert rater. The second graduate student rater found significantly fewer structure, coherence, punctuation, and unity issues than the expert rater. While both graduate student raters tended to award higher scores than the expert rater overall, the second graduate student also gave more points for unity, punctuation, coherence, and syntactic accuracy, while awarding lower vocabulary and syntactic range reasons discussed in the previous section. Unity, which the two graduate student raters reported having difficulty with in the debriefing and which they rated significantly differently, partially overlaps with irrelevant content, which may explain why the Kruskal-Wallis H Test identified Aspect 04 (*Irrelevant content*) as an aspect which the three raters scored differently. One of these aspects, therefore, should be discarded. Given that irrelevant content is the more important aspect for rating summaries and that unity is partially covered by it, Aspect 18 can be eliminated.

4.3 Association Between the Ratings

The first two statistical tests conducted provided progressively more detailed insights into the differences between the scores awarded by the three raters on various aspects of the guided summary scripts. The results inform the decisions concerning which aspects should be discarded. However, in order to determine which of the aspects should be kept in the improved version of the scale, it is necessary to also investigate the strength and direction of associations between the scores awarded by raters to those aspects where no statistically significant differences were found.

As shown in Table 4, the Spearman's rank-order correlation coefficient could not be calculated for three aspects because the scores were constant: Each rater awarded the top score for all scripts for Aspect 06 (*Repeated content*) and Aspect 08 (*Use of direct quotations*). The only difference in the case of Aspect 16 (*Style of syntax*) was that for one script the first graduate student rater awarded 2 points. The first two of these aspects are markedly relevant for summary writing, can be easily rated, and therefore can be included in the revised scale. Given the α_K value of .0001, the third aspect most likely indicates that the raters were unable to differentiate scripts based on the style of syntax aspect, which means that despite its potential (cf. Tankó, 2005), this aspect provided little useful assessment information. Consequently, it can be either discarded or merged with Aspect 12 (*Style of lexis*) because formality, much like meaning enhancing

punctuation (cf. Aspect 22, *Punctuation*) for which a moderate positive correlation was observed, is a key feature of academic discourse. Furthermore, according to the feedback provided by the second graduate student rater during the debriefing, the accurate rating of the level of formality of lexis requires additional training.

Table 4

Correlations Between the Scores of Rater Pairs

Aspect	Rater pairs[i]		
	r (A–B)	*r* (C–A)	*r* (C–B)
01 Content points included	.870**	.632**	.632**
02 Extent of content point reproduction	.722**	.382*	.494**
03 Distorted content	.329	.797**	.569**
04 Irrelevant content	.631**	.891**	.672**
05 Added content	.370*	.605**	.488**
06 Repeated content[ii]	-	-	-
07 Unwarranted lift of lexis or structures	.699**	.899**	.752**
08 Use of direct quotations[ii]	-	-	-
09 Lexical choices (meaning)	.473**	.268	.156
10 Variety of lexis	-	-	.019
11 Accurate lexis (form)	1.000**	-.089	-.089
12 Style of lexis	-	-	-.062
13 Syntactic choices (meaning)	-	-	.533**
14 Variety of syntactic structures	-	-	-.029
15 Accurate syntax (form)	-.119	.599**	-.130
16 Style of syntax[ii]	-	-	-
17 Topic sentence	.686**	.871**	.787**
18 Unity	.473**	.327	.438*
19 Concluding sentence	.386*	.770**	.479**
20 Coherence	.317	.463**	.311
21 Cohesion	.549**	.567**	.553**
22 Punctuation	.565**	.284	.068
23 Paragraphing	.535**	.792**	.535**
24 Length	.894**	.894**	1.000**

i. A & B = graduate student raters 1 & 2, C = expert rater; **. Correlation is significant at the 0.01 level (2-tailed); *. Correlation is significant at the 0.05 level (2-tailed);

ii. Could not be computed because at least one of the variables was constant.

Aspects 09 (*Lexical choices – meaning*) and 11 (*Accurate lexis – form*) were rated similarly by the two graduate students, as indicated by the moderate (Aspect 09) and very strong (Aspect 11) positive relationships. The raters also commented in the debriefing that these aspects are closely related. As a result, they could also be included in the revised scale but merged into a new aspect. Similarly, the graduate students signalled that they found it difficult to differentiate Aspect 15 (*Accurate syntax – form*) from Aspect 13 (*Syntactic choices – meaning*), which were similarly rated by the expert rater and the graduate student raters, resulting in moderate positive correlations. Therefore, like the combined Aspects 09 and 11, Aspect 13 could also be included in the streamlined list of assessment aspects merged with Aspect 15—especially given the positive correlation found in the case of each of these aspects for one rater pair. In this way, a composite lexical and a composite syntactic aspect describing the quality and control of lexis and structures can be created.

The scores awarded by each combination of rater pairs on Aspects 01, 04, 07, 17, and 23 were positively correlated, and the strength of the relationships ranged from moderate to strong. As could be expected, a very strong positive correlation was observed between the scores awarded on Aspect 24 (*Length*), an easily assessable aspect. Primarily moderate positive relationships were found between the scores awarded by the raters for Aspects 03, 05, 19, 20, and 21. Aspect 02 (*Extent of content point reproduction*) is fundamental in summarisation. The graduate student raters reported in the debriefing that they occasionally had problems deciding whether a content point was fully or only partially reproduced in the summary. Because of this and because the three related positive relationships observed for Aspect 02 ranged in strength from weak to strong, raters need additional training to be able to accurately assess this aspect. Finally, only weak to moderate positive relationships were found in the case of Aspect 18 (*Unity*), which was also observed to have been significantly differently rated; as such, this aspect can be eliminated.

5 Conclusions

The results of the analysis of the scores produced by the three raters who independently rated guided summary scripts provided divergent and convergent information about the investigated assessment aspects. Using the findings, the set of initial aspects can be streamlined for the reconstruction of the analytic rating scale that is expected to be better suited for the new, challenging institutional context and enabling a less demanding yet more accurate assessment of guided summaries.

In relation to the first research question, it was found that the overall reliability of the rating was not satisfactory. The expected reliability was only met by one of the 24 aspects investigated. Moderate agreement was found between the scores of the raters in the case of three aspects and poor agreement in the case of 13. Nevertheless, the findings are informative. Due to their negative reliability values, Aspects 10 and

14 pertaining to the range of lexis and syntactic structures can be discarded, unlike Aspect 15 (*Accurate syntax – form*), for which the reasons for the lack of agreement became evident during the rater debriefing: The graduate student raters overlooked several structure errors during the independent rating of the scripts. Both of them also commented that they had failed to notice a number of style-related issues, and the analysis showed that Aspect 16 (*Style of syntax*) did not provide much useful assessment information. In light of this, one formality-related aspect can be retained instead of the original two (Aspects 12 and 16). A final aspect that both graduate students found difficult to assess was punctuation. In the course of the debriefing, they revised their corrections and noted that they had left unnoticed a large number of punctuation errors. This explains the weak consensus in the rating of Aspect 22 (*Punctuation*); and given the important disambiguating function of punctuation (Tankó, 2022b), it can be argued that this aspect should also be included in the new analytic scale both despite and especially because of the findings.

Additional aspects to be kept on the basis of the analysis of inter-rater reliability are Aspects 06 and 08, relating to repeated information and the use of quotations, as the ratings for these aspects fully matched. Moreover, Aspect 24 (*Length*) was reliably rated, and Aspects 01, 07, and 17—pertaining to the inclusion of content points, instances of copied text, and topic sentence presence and quality—also showed acceptable reliability and should therefore also be included in the revised set of assessment aspects. The findings derived from the reliability analysis can be augmented with the closer investigation of the aspects to identify those that generated significantly different scores.

Concerning the second research question, several statistically significant differences were found between the scores awarded by the raters. Of the initially identified 10 aspects, pairwise comparisons revealed significant differences in the case of the eight. This suggests that Aspects 04 and 21, relating to irrelevant content and cohesion, should be retained. The analysis provided further evidence that Aspect 14 (*Variety of syntactic structures*) should be discarded along with Aspect 10 (*Variety of lexis*), and it also highlighted the importance of the raters' rhetorical knowledge for the effective rating of guided summaries. Both graduate student raters experienced difficulties in connection with Aspects 02 (*Extent of content point reproduction*) and 18 (*Unity*).

Finally, the investigation of correlations between the ratings of the various qualities of the scripts showed that there were several significant positive associations between the scores of pairs of raters. The scores awarded to seven aspects were from moderately to very strongly positively associated in the case of all three rater pairs (Aspects 01, 04, 07, 17, 21, 23, and 24). Weak to strong positive correlations were observed between the scores of all three rater pairs in relation to three aspects (Aspects 02, 05, and 19). The scores of two of the rater pairs ranged from moderately to strongly positively associated (Aspects 03 and 18). From these, Aspect 18 (*Unity*) can be discarded, as it was found to

be redundant. For six aspects, the scores awarded by one of the rater pairs were from moderately to very strongly positively associated (Aspects 09, 11, 13, 15, 20, and 22). Of these, Aspects 09 and 11, relating to semantically well-chosen lexis and control of lexis, were merged into one composite aspect; Aspects 13 and 15, pertaining to semantically well-chosen syntactic structures and control of syntactic structures, were also merged into another composite aspect.

Although this study is small in scale, the statistical analyses of divergent and convergent rater behaviours provided insightful and practical confirmatory and complementary information about the aspects of assessment that were created by breaking down the band descriptors of the analytic rating scale designed to assess guided summary scripts. The original 24 aspects were reduced to 18 through various processes: Altogether, 15 of the original aspects were kept without modifications; six closely related aspects were merged into three composite ones; and three aspects were discarded. Of the resulting 18 aspects, two (i.e., length and paragraphing) to be included in the reconstructed guided summary analytic rating scale require little cognitive effort from raters; while the cognitive demands of the remaining 16 aspects is high, they are distinct and stochastically independent. As a consequence, the reduced number of aspects, being recognisably different in nature and more easily distinguishable, is expected to result in ease of use and improved measurement accuracy. The scale constructed with these aspects should also better inform the teaching of guided summary writing, which is another consequential validity gain. Additionally, the study also highlighted the importance of the careful selection of academic skills tutors who teach guided summary writing and rate guided summary scripts, as well as the fundamental need for thorough and regular rater training and retraining. Appropriate funding provided for the university would most likely help address several of these issues. Future research could investigate the functioning of the reconstructed scale through interview studies and large-scale quantitative analyses of operational assessment data. The washback effect of the reconstructed scale on classroom practices could also be investigated to determine whether the operational use of the rating scale has consequential validity implications, and if so, at what scale.

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7

Linguistic Complexity and Cohesive Features of AI-Generated and Human-Produced Argumentative Essays: A Corpus-Based Analysis

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Abstract

Since the launch of ChatGPT in 2022, generative chatbots have gained popularity in the field of education among both students and educators for many different purposes. To contribute to the understanding of AI-generated texts, this study investigated the differences in linguistic complexity and cohesive indices between AI-generated and human-produced argumentative essays. A corpus of 113 argumentative essays, composed by EFL undergraduate students, were compared to a corpus of 100 argumentative essays generated by ChatGPT. This study found that ChatGPT-generated essays exhibited the linguistic characteristics of the academic genre to a greater extent than essays composed by EFL students. Most importantly, ChatGPT-generated argumentative essays were significantly more diverse and varied than human-produced essays. As for cohesion, only half of the cohesive devices showed greater values for the AI-generated texts. This article concludes with pedagogical implications for educators in the field of applied linguistics.

Keywords:

AI-generated texts, ChatGPT, argumentative essay writing, linguistic complexity, cohesion

1 Introduction

Generative artificial intelligence is a subfield of artificial intelligence dealing with the utilization of generative models to create texts, videos, images, or other kinds of data. These models can produce output in response to given prompts. Generative artificial intelligence creates new output and data by learning fundamental patterns and structures of the training data (Pinaya et al., 2023).

Thanks to advancements in transformer-based deep neural networks, especially large language models (LLMs), an AI boom occurred in the early 2020s. Numerous chatbots were launched, such as ChatGPT, Copilot, Gemini, and LLaMA. Furthermore, text-to-image and text-to-video AI generators were also designed, such as Stable Diffusion, DALL-E, and Midjourney. The early 2020s witnessed a race among companies such as Anthropic, Baidu, Google, Microsoft, and OpenAI to develop the most reliable and versatile generative artificial intelligence models (Thoppilan et al., 2022).

ChatGPT, a generative artificial intelligence chatbot, was developed by OpenAI (https://openai.com/) and launched on 30 November 2022 (Dwivedi et al., 2023). It was initially based on the GPT-3.5 LLM (i.e., third-generation generative pre-trained transformer) and was later updated to utilize the GPT-4 architecture. GPT3.5 architecture is a deep neural network designed for processing sequential data (e.g., textual data; Kooli, 2023). The generative pre-trained models are trained on a large corpus of text. According to Gans (2023), the size of this corpus is estimated to be in the hundreds of billions of words.

In the early 2020s, the field of applied linguistics, like many other disciplines, struggled with the boom of AI chatbots powered by LLMs (e.g., Google's Bard, Microsoft's Bing, and Open AI's ChatGPT). These chatbots can rapidly generate texts that simulate human writing. Several researchers have investigated ethical concerns surrounding the use of AI and found pedagogical applications (Kasneci et al., 2023; Kohnke et al., 2023). For example, Ma et al. (2023) investigated the differences between AI-generated and human-produced texts, focusing on consistency, writing style, argument logistics, and coherence. Several other scholars have explored how AI chatbots can be used in the classroom both by students and teachers. In the following section, I review some of the studies that emphasized the possible application of ChatGPT in the English as a foreign language (EFL) classroom.

1.1 The Use of ChatGPT in the Field of Language Education

ChatGPT has gained popularity among scholars in the field of language education and applied linguistics as they seek to understand its full potential and use it ethically in language teaching and research. For example, Mizumoto and Eguchi (2023) claimed that ChatGPT can be utilized to automatically score essays in the field of second language (L2) learning. The researchers used ChatGPT to automatically score 12,100 essays selected from the ETS Corpus of Non-Native Written English (TOEFL 11), comparing the scores to benchmark levels. In addition, the researchers investigated the extent to which linguistic characteristics impacted automated essay scoring with ChatGPT. The findings demonstrated that automated essay scoring utilizing ChatGPT is more or less accurate and reliable and can assist human raters. In addition, it

was found that incorporating linguistic characteristics can boost scoring accuracy. Mizumoto and Eguchi's (2023) study illustrates that ChatGPT, or AI language models in general, can be effectively used as automated essay scoring tools, and that ChatGPT could initiate a revolution in writing assessment, feedback practice, and research.

In another study, Pfau et al. (2023) explored the potential of ChatGPT to measure linguistic accuracy in L2 writing. The data consisted of 100 essays written by L2 students across five different proficiency levels. The essays were processed with ChatGPT and manually coded. The researchers found a strong correlation between the assessment of human raters and ChatGPT. However, the correlation decreased at lower proficiency levels as ChatGPT's misidentification of linguistic errors became more sporadic. Furthermore, ChatGPT frequently underestimated the total number of errors.

In a more recent study, Yamashita (2024) demonstrated the potential of many-facet Rasch measurement (MFRM) with which ChatGPT-4.0 can be used as an automated essay scoring tool. A total of 136 essays composed by Asian EFL learners were selected from the International Corpus Network of Asian Learners of English (ICNALE) and scored by 80 human raters. The 136 essays were also scored by ChatGPT-4.0. Yamashita's study found that there was alignment on the Common European Framework of Reference (CEFR) scale between human raters and ChatGPT-4.0 in differentiating essays composed by three different proficiency groups. Correlation coefficients ranged from moderate to strong values between the scores of ChatGPT-4.0 and human raters (complexity: $r = 0.67$, accuracy: $r = .82$, and fluency: $r = .75$). However, only 50% of the ratings were the same. Yamashita also found that the severity levels of ChatGPT and human raters were similar, and that the scores of ChatGPT-4.0 were internally consistent, which made it particularly challenging to disentangle variance in the ratings of ChatGPT-4.0 from a measurement perspective. There were no significant biases based on the gender of the writers. Yamashita's study demonstrated that ChatGPT-4.0 can be utilized as an automated essay scoring tool, and, at the same time, that the MFRM is a fruitful approach to complement agreement and correlation metrics.

Mizumoto et al. (2024) also explored to what extent ChatGPT is effective as a tool for measuring linguistic accuracy in L2 writing, situating their study within the framework of complexity, accuracy, and fluency (CAF). The researchers used 232 written samples from the error-tagged Cambridge Learners Corpus First Certificate in English (CLC FCE), which were scored by ChatGPT, Grammarly, and human raters. A strong positive correlation was found between the scores of human raters and ChatGPT, showing that ChatGPT can precisely assess L2 writing. ChatGPT demonstrated a closer alignment with human ratings and student scores than Grammarly. It was concluded that ChatGPT is a potential tool for measuring linguistic accuracy in L2 writing and for improving efficiency in L2 writing research and pedagogy.

Apart from the effective application of ChatGPT in the language classroom, some researchers have focused on ethical issues pertaining to the use of AI. For example, Casal and Kessler (2023) investigated to what extent applied linguists and reviewers of top journals could detect the use of AI, and to what extent editors thought that the use of AI is ethical for writing research articles. A total of 72 linguists filled in a judgment task on whether abstracts were generated by ChatGPT or written by humans. It was found that only 38.9% of the linguists could detect the use of AI. Casal and Kessler (2023) also interviewed some of their participants (n = 27) from the group of linguists (N = 72) on their beliefs about the use of ChatGPT. The interviewers asked the respondents whether they thought it was ethical to use AI tools for academic research and publishing goals. It was found that 19 participants believed that AI tools were acceptable to use under certain conditions, while only seven respondents considered the use of AI tools unacceptable. Only one respondent believed that AI tools could be used under all circumstances. The interviews also revealed that 59.3% of the interviewees believed that it was ethical to use AI tools for text editing, while 51.9% thought it was ethical to write computer codes for their study. 40.7% of the respondents also thought that writing a summary for public consumption was ethical, and 37% believed that writing an abstract with AI tools was ethical.

To conclude, AI tools, especially ChatGPT, can be reliably used as automated essay scoring tools (Mizumoto & Eguchi, 2023; Mizumoto et al., 2024; Pfau et al., 2023; Yamashita, 2024). In this way, essay rating can be automated, saving a considerable amount of time for teachers. When it comes to determining whether a particular written sample was produced by humans or AI tools, Casal and Kessler (2023) appears to be the only research investigating the extent to which the two types can be differentiated, and the results are not particularly promising. It can be concluded that we, as instructors and researchers, cannot reliably distinguish between human-produced and AI-generated texts.

1.2 The Current Study

In order to better understand AI-generated texts, I intended to analyze AI-generated texts in greater depth. In my analysis, I focus on the linguistic and cohesive characteristics of AI-generated texts. As a second step, I compare AI-generated to human-produced texts. The research questions (RQs) guiding the current study are:

RQ1: What are the linguistic and cohesive features of ChatGPT-generated essays?

RQ2: To what extent do ChatGPT-generated and human-produced texts differ in the measured linguistic and cohesive features?

2 Method

To address the two research questions, two corpora were created. First, I collected 113 written samples from EFL students from a large university in Hungary. Second, I generated 100 samples using ChatGPT-4.0.

2.1 Participants

The participants in this study, selected from a larger project (Wind, 2022), were 11 EFL students enrolled in an Advanced Writing course at a large university in Hungary. Among the 11 participants, there were nine students of Hungarian L1 background along with two Erasmus students, one from Spain and another one from Romania. The participants attended the Advanced Writing course that was taught by the researcher. The students were asked to produce 10-11 written samples over one academic semester: approximately one sample per week. The written samples were collected electronically by asking the participants to submit their assignments via Moodle. The written samples were collected in the spring term of the 2019/20 academic year; therefore, it was presumed that the participants did not have access to AI chatbots such as ChatGPT.

2.2 Advanced Writing Course

The Advanced Writing (AW) course is a compulsory course for English major students and an elective course for teacher trainees at the university. Since the university has Erasmus partnerships with many different universities, some foreign students also attend the AW course. Prior to attending the AW course, students are required to complete the Academic Skills 1 and 2 courses in the first year of their studies. In the Academic Skills courses, students learn how to paraphrase, summarize, and synthesize (Tankó, 2019). At the end of the first year, students must pass a proficiency exam at B2+ CEFR level; therefore, it was presumed that all students from the AW course were more or less at the same proficiency level, with the exception of the two Erasmus students.

The AW courses are taught by different instructors at the Department of English Applied Linguistics at the university; therefore, there might be slight variations in the teaching materials and methods used. In this specific AW course, Wallwork's (2016) English for Writing Research Papers was used, and the students learnt about how to enhance the readability of their writing and decrease the number of mistakes they make in English by writing concisely and without redundancy. Students also learnt how to make their writing less ambiguous, use effective word order, and split up long sentences.

2.3 Writing Prompts

Since the course was offered by the Department of English Applied Linguistics, all writing prompts were related to the field of second language acquisition, given that all participants were EFL students and thus had experience with language learning. The instructor of the AW course collected arguments or myths from Brown and Larson-Halls' (2012) Second language acquisition myths, Folse's (2004) *Vocabulary myths*, Brown's (2011) *Listening myths*, Reid et al.'s (2008) *Writing myths*, Grant et al.'s (2014) *Pronunciation myths*, and Plakans and Gabril's (2015) *Assessment myths*. These arguments served as the writing prompts for the written assignments. The instructions and the writing prompts can be found in *Appendix A* and *B*, respectively.

The participants were asked to compose an argumentative-type essay (in the form of a mini literature review) between 250 and 300 words. This task was a shortened version of the task required as part of the Academic Skills 2 course; however, the word limit was reduced by half. Therefore, it was assumed that students had prior experience with writing mini-literature reviews. The students were asked to give reasons for their answers and include relevant examples from their own knowledge or experience. In addition, the participants were asked to include at least two references to support their claims. To facilitate the inclusion of references, students were advised to use VanPatten and Benati's (2010) Key terms in second language acquisition.

The minimum requirement to successfully pass the course was to respond to 10 out of the 12 writing prompts during the semester. However, the students were encouraged to respond to all 12 writing prompts for extra points. In the end, eight students composed 10 essays, while three students composed 11 essays during the course, resulting in 113 essays. The final grade for the course was based entirely on the quality of the writing assignments.

The first 10 writing prompts from *Appendix A* were also entered into ChatGPT-4.0, which was asked to generate 10 different essays on each topic. The prompt can be seen in *Appendix C*. The final AI-generated corpus consisted of 100 different essays.

2.4 Data Analysis

Lexical complexity, a multidimensional construct, consists of at least three sub-constructs: (1) lexical density, (2) lexical sophistication, and (3) lexical variability (Bulté & Housen, 2012). Lexical density measures the extent to which syntactic structures are packed with lexical items. It is a reliable indicator of condensed academic writing (Biber, 2006; Biber & Gray, 2010). Lexical density was measured by lexical density types and lexical density tokens indices, calculated by the Tool for the Automatic Analysis of LExical Diversity 1.4.1 (TAALED; Kyle et al., 2021).

Lexical diversity refers to the range of distinct words used in a text and is a reliable indicator of lexical proficiency and development (Yoon, 2017). It was measured using the type-token ratio (TTR). However, the TTR index is sensitive to text length; therefore, the measure of textual lexical diversity (MTLD) was also calculated (McCarthy, 2005). The TTR and the MTLD indices were calculated using the TAALED software. To measure academic vocabulary, the academic word list (AWL) index (Coxhead, 2000) and the letters-per-word index were selected. The AWL index measures the percentage of academic words in a text. Although more refined lists exist, such as the academic vocabulary list, Wind (2023) showed that the Corpus of Contemporary American English (COCA) might not be applicable to measure specific academic vocabulary (e.g., academic texts in the field of applied linguistics). The AWL index was calculated with the Tool for the Automatic Analysis of Lexical Sophistication 2.2 (TAALES; (Kyle & Crossley, 2015; Kyle et al. 2018), while the letters-per-word index was computed using the Simple Natural language Processing Tool (SiNLP; Crossley et al., 2014). The word length is considered a reliable indicator of lexical sophistication (Jarvis et al., 2003; Wolfe-Quintero et al., 1998), as academic and infrequent words in English tend to be longer. For example, the academic equivalent of the word 'help' might be 'facilitate', the former consisting of four letters, while the latter has 10.

Syntactic complexity, a multidimensional construct, consists of at least three main sub-constructs: (1) length-based measures, (2) subordination, and (3) phrasal complexity (Norris & Ortega, 2009). General syntactic complexity was measured using the mean length of sentence (MLS). Subordination was measured with the dependent clause per clause (DC/C) index. To measure phrasal complexity, the mean length of clause (MLC), the coordinate phrase per clause (CP/C), and the complex nominal per clause (CN/C) indices were calculated. MLC is a large-grained index and a general indicator of phrasal complexity (Kyle & Crossley, 2018). Syntactic complexity indices were calculated with the L2 Syntactic Complexity Analyzer (Ai & Lu, 2013; Lu, 2010; 2011; Lu & Ai, 2015).

Cohesion was measured at three different levels: (1) local cohesion, (2) global cohesion, and (3) overall text cohesion. The selection of the cohesive devices was informed by Crossley et al. (2016a) and Abdi-Tabari and Wind (2025). Local or sentence-level cohesion was measured by latent semantic analyses (LSA) (all sentences) index (Launderer et al., 2007). Global cohesion, mainly referring to paragraphs, was measured by the LSA (all paragraphs) index. Overall text cohesion was measured by the incidence of basic and all connectives (e.g., but, and, or), conjunctions (e.g., therefore, in other words), disjunctions (e.g., interestingly), lexical subordinators (e.g., whether), and coordinating conjunctions (e.g., and, but, or). The cohesion indices were computed with the Tool for the Automatic Analysis of Cohesion (TAACO) (Crossley et al., 2016b, 2019). Table 1 is a summary of the linguistic complexity and cohesion indices used in this study.

Table 1

Linguistic Complexity and Cohesion Indices

Construct	Index	Code	Tool
Lexical complexity	Lexical density types	LDTy	TAALED
	Lexical density tokens	LDTk	TAALED
	Academic Word List	AWL	TAALES
	Letters per word	LPW	SiNLP
	Measure of textual lexical diversity	MTLD	TAALED
	Type token ratio	TTR	TAALED
Syntactic complexity	Mean length of sentence	MLS	L2SCA
	Mean length of clause	MLC	L2SCA
	Dependent clause per clause	DC/C	L2SCA
	Coordinating phrase per clause	CP/C	L2SCA
	Complex nominals per clause	CN/C	L2SCA
Cohesion	Latent semantic analysis (all sentences)	LSA	TAACO 2.0.4
	Latent semantic analysis (all paragraphs)	LSA	TAACO 2.0.4
	Basic connectives	BC	TAACO 2.0.4
	Conjunctions	CONJ	TAACO 2.0.4
	Disjunctions	DISJ	TAACO 2.0.4
	Lexical subordinators	LEXSUB	TAACO 2.0.4
	Coordinating conjunctions	COCONJ	TAACO 2.0.4
	All connectives	CON	TAACO 2.0.4

3 Results

Table 2 shows the descriptive statistics for the linguistic complexity and cohesion indices used in this study. To determine whether the data had been drawn from a normally distributed population, the Kolmogorov-Smirnov test was run. Since the number of samples exceeded 50, the Kolmogorov-Smirnov test was used instead of the Shapiro-Wilk test. Table 3 shows that the *p* values for the MTLD, disjunctions, and coordinating conjunctions indices were less than .05, indicating a significant deviation from a normal distribution. Therefore, for the MTLD, the disjunctions, and the coordinating conjunctions indices, the Mann-Whitney U nonparametric statistical test was used, while for the other indices either the independent samples *t*-test or the Welch test was used. However, before deciding which test to use, a Levene's test was run to assess the equality of variances.

Table 2

Descriptives Statistics

Index	Group	N	*M*	*SD*
Lexical density types	AI	100	0.708	0 .036
	Human	113	0.664	0.040
Lexical density tokens	AI	100	0.591	0.036
	Human	113	0.490	0.040
Academic Word List	AI	100	0.142	0.031
	Human	113	0.083	0.032
Letters per word	AI	100	6.083	0.272
	Human	113	5.116	0.314
Measure of textual lexical diversity	AI	100	99.172	21.712
	Human	113	71.69	15.75
Type token ratio	AI	100	0.655	0.043
	Human	113	0.564	0.045
Mean length of sentence	AI	100	19.89	2.193
	Human	113	19.76	3.382
Mean length of clause	AI	100	11.594	1.711
	Human	113	10.347	1.873
Dependent clause per clause	AI	100	0.403	0.088
	Human	113	0.406	0.094
Coordinating phrase per clause	AI	100	0.445	0.186
	Human	113	0.262	0.13
Complex nominals per clause	AI	100	1.518	0.356
	Human	113	1.299	0.357
Latent semantic analysis (all sentences)	AI	100	0.403	0.081
	Human	113	0.369	0.1
Latent semantic analysis (all paragraphs)	AI	100	0.672	0.087
	Human	113	0.643	0.13
Basic connectives	AI	100	0.041	0.014
	Human	113	0.034	0.01
Conjunctions	AI	100	0.037	0.013
	Human	113	0.028	0.009
Disjunctions	AI	100	0.004	0.005
	Human	113	0.005	0.004
Lexical subordinators	AI	100	0.016	0.007
	Human	113	0.025	0.011
Coordinating conjunctions	AI	100	0.002	0.003
	Human	113	0.006	0.004
All connectives	AI	100	0.073	0.015
	Human	113	0.077	0.017

Table 3

Test of Normality (Kolmogorov-Smirnov)

Index	Group	Statistic	*p*
Lexical density types	AI	0.080	0.538
	Human	0.076	0.529
Lexical density tokens	AI	0.074	0.641
	Human	0.081	0.452
Academic word list	Human	0.077	0.522
	AI	0.099	0.279
Letters per word	Human	0.077	0.519
	AI	0.057	0.896
Measure of textual lexical diversity	Human	0.666	<.001
	AI	0.104	0.234
Type token ratio	Human	0.055	0.886
	AI	0.087	0.431
Mean length of sentence	Human	0.091	0.308
	AI	0.132	0.061
Mean length of clause	Human	0.097	0.234
	AI	0.123	0.095
Dependent clause per clause	Human	0.078	0.505
	AI	0.106	0.215
Coordinating phrase per clause	Human	0.109	0.136
	AI	0.057	0.901
Complex nominals	Human	0.098	0.230
	AI	0.117	0.130
Latent semantic analysis (all sentence)	Human	0.078	0.496
	AI	0.114	0.150
Latent semantic analysis (all paragraph)	Human	0.066	0.379
	AI	0.037	0.999
Basic connectives	Human	0.067	0.698
	AI	0.054	0.932
Conjunctions	Human	0.055	0.877
	AI	0.081	0.524
Disjunctions	Human	0.148	0.014
	AI	0.268	<.001
Lexical subordinators	Human	0.056	0.873
	AI	0.065	0.786
Coordinating conjunctions	Human	0.178	0.002
	AI	0.437	<.001
All connectives	Human	0.070	0.635
	AI	0.057	0.900

Table 4 shows the results for Levene's test, which assesses the equality of variances for the data. The *p*-values for the MTLD, CP/C, LSA (all sentences), LSA (all paragraphs), basic connectives, conjunctions, and lexical subordinators indices for the Levene's test were less than .05, indicating that there were significant differences between the variances. Therefore, for these indices the Welch test was used, while for the remaining indices the independent samples *t*-test was utilized.

Table 4

Test of Equality of Variances (Levene's)

Index	*F*	*df1*	*df2*	*p*
Lexical density types	0.328	1	211	0.567
Lexical density tokens	0.622	1	211	0.431
Academic Vocabulary List	2.347	1	211	0.127
Letters per word	0.444	1	211	0.506
Type token ratio	0.008	1	211	0.93
Mean length of sentence	9.805	1	211	0.002
Mean length of clause	1.581	1	211	0.21
Dependent clause per clause	1.255	1	211	0.264
Coordinating phrases per clause	16.098	1	211	< .001
Complex nominals per clause	0.001	1	211	0.981
Latent semantic analysis (all sentences)	5.442	1	211	0.021
Latent semantic analysis (all paragraphs)	15.214	1	211	< .001
Basic connectives	8.37	1	211	0.004
Conjunctions	11.862	1	211	< .001
Lexical subordinators	23.586	1	211	< .001
All connectives	2.507	1	211	0.115

Table 5 presents the results of the independent samples *t*-test. The *p*-values for the lexical density types, lexical density tokens, academic word list, letters per word, type-token ratio, mean length of clause, and complex nominals per clause indices were statistically significant, while those of the dependent clause per clause and all connectives indices were not.

Table 5

Independent Samples T-Test Results

Index	Statistic	*df*	*d*	*p*
Lexical density types	8.409	211	0.160	<.001
Lexical density tokens	19.452	211	0.233	<.001
Academic Word List	13.54	211	0.190	< .001
Letters per word	23.901	211	0.270	< .001
Type token ratio	15.019	211	0.200	< .001
Mean length of clause	5.051	211	0.146	< .001
Dependent clause per clause	-0.215	211	0.137	0.83
Complex nominals per clause	4.481	211	0.144	< .001
All connectives	-1.587	211	0.138	0.114

Table 6 shows that the *p*-values of the Welch test for the coordinating phrases per clause, latent semantic analysis (all sentences), basic connectives, conjunctions, and lexical subordinators indices were statistically significant, while those of the mean length of sentence and latent semantic analysis (all paragraphs) indices were not.

Table 6

Welch Test Results

Index	Statistic	df	d	*p*
Mean length of sentence	0.336	194.106	0.137	0.737
Coordinating phrases per clause	8.209	174.189	0.159	< .001
Latent semantic analysis (all sentences)	2.67	209.62	0.140	0.008
Latent semantic analysis (all paragraphs)	1.955	197.254	0.139	0.052
Basic connectives	3.999	180.203	0.143	< .001
Conjunctions	5.453	179.317	0.147	< .001
Lexical subordinators	-6.726	192.118	0.152	< .001

Finally, Table 7 summarizes the results of the nonparametric equivalent of the *t*-test, the Mann-Whitney U test. The *p*-values for the MTLD and coordinating conjunctions were statistically significant, while those of the disjunctions were not. The effect sizes for the MTLD and the coordinating conjunctions were 0.63 and 0.5, respectively, both of which are considered large.

Table 7

Mann-Whitney U Test Results

Index	*Z*	*r*	*p*
Measure of textual lexical diversity	-9.134	0.63	< .001
Disjunctions	1.295	0.089	0.195
Coordinating conjunctions	7.315	0.5	<.001

4 Discussion

This study investigated the differences in linguistic complexity and cohesion between human-produced and AI-generated argumentative essays to gain deeper insight into the linguistic and cohesive characteristics of AI-generated texts.

Lexical complexity indices demonstrate that AI-generated texts contained denser and more diverse vocabulary, as measured by the lexical density types and tokens, type-token ratio, and MTLD indices. The difference between the measure of textual lexical diversity index was also statistically significant and the effect size was large (r = 0.63). Example 1 shows Text 2, an AI-generated essay on the topic of '*Listening cannot be taught'* (writing prompt G), which exhibited the highest TTR and MTLD scores (0.692 and 170.62 respectively).

Example 1 (AI-generated text; writing prompt G)

> Listening cannot be effectively taught due to the significant role of individual differences in the listening process. Factors such as prior knowledge, cognitive styles, and personal experiences heavily influence how individuals interpret and understand spoken language. According to Cohen (1998), these personal variables shape a listener's ability to process information, making it challenging to create a one-size-fits-all approach to teaching listening skills.
>
> In my observations, some students excel in listening tasks while others struggle, even when exposed to the same material. For instance, a student familiar with a particular topic may grasp spoken content more quickly than one with limited background knowledge. This variance highlights that listening proficiency is not solely a product of instruction; rather, it reflects individual capabilities and experiences.
>
> Furthermore, effective listening often requires an emotional connection to the material, which cannot be taught through traditional methods. Students who engage with content that resonates with them tend to demonstrate better listening skills. Therefore, instead of attempting to teach listening directly, educators should focus on creating enriching experiences that allow students to develop their unique listening abilities.

In addition, AI-generated texts contained longer words, as measured by the letters-per-word index, and more academic vocabulary, as indicated by the academic word list index. Although the independent samples *t*-tests indicated statistically significant differences between human-produced and AI-generated texts for the academic word list, letters-per-word, and the type-token ratio indices, the effect sizes were small, ranging from $d = 1.90$ to $d = 0.270$. In sum, AI-generated texts reflected the genre features of academic writing to a greater extent than human-produced texts.

Syntactic complexity indices demonstrated that AI-generated texts contained more words per clause, more coordinate phrases per clause, and more complex nominals per clause. Although the differences between the AI-generated and human-produced texts were statistically significant, the effect sizes were small. Interestingly, there were no statistically significant differences in the mean length of sentence and the dependent-clause-per-clauses indices. More importantly, the mean of the MLS index for the AI-generated texts was 19.89, compared to 19.76 for human-produced texts. Similarly, the dependent-clause-per-clause indices were also nearly identical (0.445 for the AI-generated texts and 0.406 for the essays composed by the students). Overall, AI generated texts exhibited genre-specific features to a greater extent than texts composed by students.

Cohesion indices showed that human-produced texts contained significantly more coordinating conjunctions, with a medium effect size. The highest coordinating conjunctions score was measured for Participant 1 (coordinating conjunction = 0.02). This student used coordinating conjunctions to connect words and clauses.

Example 2 (Human-produced text; writing prompt A; coordinating conjunctions are underlined)

> Considering a foreign language, pronunciation is one of the most difficult and diverse aspects of a language. Obviously, individuals cannot reach the level of a native speaker, however, practice and diligence make this skill better. Nevertheless, school is not the only place where one can hone pronunciation. Improving language skills is never too late, which means age is not necessarily an obstacle.
>
> According to O'Brien, teachers do not put enough attention to non-native pronunciation at school, which causes low self-esteem and anxiety when students speak a foreign language. In most cases, tutors are not trained properly to pass over the "science" of pronunciation. However, individuals that learn any foreign language probably realized by now that grammar, vocabulary and also pronunciation could develop by practice, which also includes watching lots of foreign movies and videos.
>
> Pronunciation is also attached to the personality itself, which supports the claim that it is not so closely connected to age. Individuals who visit English

speaking countries frequently have a greater chance of improvement in their communication skills. According to Morley, whether non-native pronunciation can be taught at all is a controversial issue, too, nowadays. Of course, speaking more and more can cause development in this skill, however, it may be true that there is no proper way to learn it, one mostly picks it up unintentionally.

In conclusion, there are several ways of improving the non-native pronunciation and the age of an individual is probably problematical concerning other aspects of a language, like learning new words and phrases, however, pronunciation can always be developed. Personally, I started to watch lots of series in English last year and I noticed on myself that my pronunciation is getting better. These days I am also not so anxious when it comes to speak a foreign language.

Furthermore, the AI-generated texts exhibited greater semantic similarity between sentences and paragraphs than the essays composed by students. However, these differences in the LSA indices were not statistically significant. AI-generated texts also contained more basic connectives, conjunctions, and lexical subordinators. Although these were statistically significant, the effect sizes were small. Interestingly, human-produced texts contained slightly more disjunctions and connectives; however, the differences were not statistically significant.

5 Conclusion

This study sheds light on the differences in linguistic complexity and cohesion between AI-generated and human-produced argumentative essays. Ten out of the 11 linguistic complexity and four out of the eight cohesive indices showed higher values for the AI-generated texts, indicating that ChatGPT can produce argumentative essays that reflect the genre characteristics of the academic writing: longer sentences, more words per clause, more academic words, and higher levels of semantic co-referentiality.

This study contributes to the current understanding of AI-generated texts by comparing the linguistic complexity and cohesive features of argumentative essays composed by ChatGPT and EFL students. Although this comparison is just a preliminary step into an in-depth understanding of how AI tools produce texts, this study shows that there is a high resemblance between AI- and human-produced texts in terms of linguistic complexity and cohesion.

One of the major pedagogical implications of this study is that AI-generated texts exhibited academic writing features to a greater extent. More precisely, ChatGPT was able to produce argumentative essays that included more diverse and varied vocabulary. Both the type-token ratio and the MTLD indices were significantly higher for

the ChatGPT-produced texts, indicating that while humans may tend to repeat certain key words, ChatGPT replaces repeated words with synonyms.

This study has several limitations. First, the human-produced texts were composed by non-professional writers, specifically undergraduate students. Therefore, if a similar study was carried out comparing AI-generated texts and those composed by professional writers (e.g., academics), the differences in linguistic complexity and cohesion indices between human and AI-generated texts might be smaller. Second, this study limited its focus to linguistic and cohesion indices. Future studies might explore more content-related features of writing that might facilitate the detection of AI chatbots. Third, the corpus used in this study is relatively small. Therefore, future research might utilize a larger corpus and include more genres to explore the characteristic features of AI chatbots.

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Appendix A

Instruction for Human Writers

Please write between 250 and 300 words on the following topic: _____. Give reasons for your answer and include any relevant examples from your own knowledge or experience. You should include at least two references in APA style.

Appendix B

Writing Prompts

PROMPT	AREA	TOPIC
A	SLA	Individual differences are a major, perhaps the major, factor in SLA.
B	SLA	Language students learn (and retain) what they are taught.
C	Vocabulary	In learning another language, vocabulary is not as important as grammar or other areas.
D	Vocabulary	The use of translations to learn new vocabulary should be discouraged.
E	Vocabulary	The best dictionary for L2 learners is a monolingual dictionary.
F	Listening	Students should only listen to authentic materials.
G	Listening	Listening can't be taught.
H	Writing	Students must learn to correct all their writing errors.
I	Writing	Academic writing courses should focus on paragraph and essay development.
J	Pronunciation	Once you've been speaking a second language for years, it's too late to change your pronunciation.
K	Language testing	We should test only one skill at a time.
L	SLA	Children learn languages quickly and easily while adults are ineffective in comparison

Appendix C

Prompt for the ChatGPT

Please write ten different essays between 250 and 300 words on the following topic: _____. Give reasons for your answer and include any relevant examples from your own knowledge or experience. You should include at least two references in APA style.

8

Developing Multimodal Literacy with Young Adult Graphic Novels in the Language Classroom

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Abstract

The multimodal nature of our learning and communication has attracted growing interest in language education since the New London Group (1996) presented their 'multiliteracies' approach to literacy pedagogy. Developing language learners' multimodal literacy is an important task for educators for two reasons. First, it highlights the role of intercultural skills and contextual knowledge in communication and meaning-making. As Cope and Kalantzis (2015) point out, the factors shaping cross-cultural experiences include culture, gender, life experience, and social background. From this perspective, Young Adult Literature (YAL) can be viewed as an ideal resource for addressing challenging issues in the classroom. Second, our meaning-making practices integrate several modes or 'channels' of presentation and communication, including writing, image, sound, moving image, speech, gesture, gaze, and posture (Kress, 2010). From the perspective of multimodal discourse and stylistics, young adult novels are multimodal texts in both their book versions and adaptations, which include complex multimodal texts such as videos, animations, and films. Moreover, students' text responses inspired by the novels are quintessentially multimodal, ranging from posters to comics to videos. In this chapter, we examine the process of reading YAL as a multimodal learning experience and young adult novels as multimodal texts and discuss some possibilities for using them to develop students' multiliteracies in the language classroom. In this process, we draw on examples of YAL published in different text formats, including modal choices such as text, image, colour, typography, and layout to illustrate the pedagogical affordances of these rich resources.

Keywords:

YA graphic novels, multiliteracies, multimodality, narrative

1 Introduction

Young Adult (YA) graphic novels offer a powerful resource for language and literacy teachers whose pedagogic agenda today includes the development of students' language, literacy (including digital and multimodal), intercultural, and social-emotional skills. Available in many different forms (e.g., novels, illustrated novels, graphic novels), YAL has the potential to engage, entertain, inform, and educate readers of all ages. This type of literature is a valuable resource for several reasons. First, these books often address popular, socially and emotionally significant yet often avoided topics such as migration, war, mental health, and community issues. Second, they present cultural experiences that, upon reflection, contribute to intercultural skills development while relating to students' own lives. Third, they are multimodal (i.e., they combine multiple resources for meaning-making, including image, text, and graphic design elements), allowing students to access different representations of meaning within them. Given such characteristics, nothing is stable or static in these texts, and meanings are constructed by synthesizing information from various resources (Kress, 2010). All these qualities support the potential of YAL to foster students' multiliteracies with a far-reaching impact on their overall development.

To benefit from such potentials of YAL, teachers need explicit strategies to access the meanings offered by these texts and to support the students' engagement with them. To demonstrate such strategies, this practice-based study brings together four different perspectives: the multiliteracies approach (Cope & Kalantzis, 2015), the social semiotic approach to multimodality (Kress & van Leeuwen, 2006; van Leeuwen, 2017), the narrative studies approach to understanding meaning-making, and the reconceptualization of intercultural communicative competence in literacy development (Byram, 2009) to provide an overview of the potentials of working with YAL in the EFL classroom. In this process, we highlight the need for a pedagogic metalanguage to engage with such texts. We illustrate the potential of YAL through two YA works: *I Was Their American Dream* by Malaka Gharib (2019) and *Jane, the Fox and Me* by Fanny Britt and Isabelle Arsenault (2012). We conclude that reading YAL with the support of explicit multimodal literacy pedagogy can reach beyond the development of language skills, as it has the potential to enhance students' intercultural and social-emotional skills.

2 Multimodality and Narrative

The growing presence of multiple intersecting channels of communication replacing the traditional focus on written or spoken forms has prompted EFL teaching methodology to develop an approach to multimodality and experiment with its classroom potential (e.g., Diamantopoulou & Ørevik, 2022; Lim & Tan-Chia, 2023). From a social semiotic multimodal perspective (e.g., Kress, 2010), our communication and meaning-making

always engage with multiple resources in a dynamic and interactive meaning-making process. In short, a multimodal approach acknowledges that a message is transmitted by means other than writing or at least in combination with it. Various meaning-making resources beyond spoken and written language include images, sounds, gestures, touch, and movements (Kress, 2003, 2010; Kress & van Leeuwen, 1996/2006).

This principle of multimodality applies to storytelling and the understanding of narratives. According to Page (2010), multimodality in storytelling means that stories do not consist of words alone, whether oral, written, or digital. It results in the reconfiguration of "narrative theory and analysis in such a way that verbal resources are understood as *only one* of many semiotic elements integrated together in the process of storytelling" (p. 3). For narrative theory, multimodal narratives are compelling texts, as they unfold both in time (often defined as sequential art) and space (Kress 2003).

Although picture books, graphic novels, and illustrated fiction might be considered a combination of two modes, namely verbal and visual, by careful social semiotic analysis, other meaning-making resources such as colour, layout (Pantaleo, 2012) and typography (van Leeuwen, 2005) gain special meaning-making significance. An explicit focus on the multimodal aspects of meaning-making leads to a more engaging understanding of narratives, impacting the reading experience and involving different aspects of cognition, emotions, and creativity. In pedagogical contexts, the focus on multimodality in storytelling has shifted how we perceive the benefits of using narratives and multimodal texts in the EFL classroom (e.g., Bland, 2018; Mourão & Bennett, 2025).

Kress and van Leeuwen argue that in multimodality, "common semiotic principles operate in and across different modes" (2001, pp. 1-2), constructing meaning through controversial messages and extrapolated values. Multimodal narratives create imaginative contexts that engage the different senses and prompt tasks that involve cognition, emotions, and creativity. Thus, these stories engage learners through challenging their thinking on multiple levels. Narratives have traditionally been understood as a valuable source of incidental vocabulary learning (Elley, 1989; Krashen, 1993;), which is only enhanced by the integration of a multimodal approach which goes beyond the traditional verbal mode to provide meaningful contexts to new words and language structures.

To sum up, multimodal narratives in their many forms provide opportunities for various types of interaction, where visuals prompt interactive responses that can be visual, verbal, or both. From a social semiotic multimodal perspective, the visual includes more than the illustrations as graphic organizers, typography, colour, and the material nature of narratives are also significant. Multimodal narratives, especially graphic novels, offer literary and intercultural experiences (Rimmerleide, 2022) and help students develop their intercultural presence and empathetic response to social issues (Kramsch, 2010). The multiple platforms of meaning-making inspire learners to respond to and think about sensitive and even divisive topics. With the complex

dynamics of multimodal meaning-making, both EFL teachers and their students need to develop specific integrated skills to engage with multimodal texts. However, EFL teachers often find that the adoption of pedagogic metalanguage (e.g., Karatza & Lim, 2024) is necessary to scaffold classroom work on multimodal texts. In what follows, we offer a hands-on approach to understanding how pedagogic metalanguage can be applied to unfold the potentials of the two selected graphic novels.

3 Multimodality and Multiliteracies

The advances in digital technologies have resulted in new ways of communication and globalisation in an increasingly connected world, making diverse cultural and social experiences easily accessible. Yet, the emergence of more complex representational forms has created a niche for a more inclusive conceptualization of "literacy" complemented with new meanings based on an understanding of narrative and multimodality. The New London Group (1996) introduced the term "multiliteracies," arguing that the focus of literacy studies must extend beyond language. Multiliteracy as a pedagogical framework (Cope & Kalantzis, 2000) embraces two major aspects of communication. First, it refers to a spectrum of meaning-making conventions in society and culture. Second, it incorporates the social semiotic multimodal approach to communication and learning (Cope & Kalantzis, 2015). Given the state of the English language in the world, EFL classrooms have become sensitive to this change, shifting attention to digital, critical, and ultimately multimodally informed literacy.

As a means to reflect on social and cultural spheres, multiliteracies pedagogy addresses "the variability of meaning-making in different cultural, social or domain-specific contexts" (Cope & Kalantzis, 2015, p. 3). "Every meaning exchange is cross-cultural to a certain degree," and learners need to be able to negotiate meanings from different contexts shaped by culture, gender, life experience, subject matter, and social and subject domain (Cope & Kalantzis, 2015, p. 3). The multimodal aspect of multiliteracies pedagogy refers to the ability to vary and combine distinct semiotic modes to make meaning in the most context-appropriate way. Moreover, it means that the knowledge of these codes enables individuals to understand and decipher messages in a multimodally told narrative (van Leeuwen, 2017, p. 18).

This approach to literacy paves the way for a multimodal pedagogy that explicitly details students' expectations regarding text comprehension and production. It also highlights the importance of the pedagogical metalanguage of multimodality (New London Group, 1996), which reveals multimodal meanings in texts (Lim et al., 2022; Lim & Tan-Chia, 2023; Sindoni et al., 2022; Unsworth, 2006). Using a pedagogic metalanguage makes complex analytical and theoretical terminology more easily accessible by simplifying it, mainly through questions that help students focus on different aspects of a

multimodal text. Thus, students become more aware of the meanings conveyed through the multiple modes of a narrative. The notion of semiotic awareness (Towndrow et al., 2013) is connected to multimodal literacy as well as multimodal pedagogy (Lim & Tan-Chia, 2023). Seen as an essential element in multimodal literacy, semiotic awareness is the "critical attention to relational, multimodal aspects of meaning design, without which meaningful assessment schemes can neither be conceived nor implemented" (Towndrow et al., 2013, p. 328). In this sense, semiotic awareness is both a means for teachers and an ends for students in developing their multiliteracy skills.

4 Ya Graphic Novels as Ultimodal Narrative Texts

The graphic novel is a widely popular format of YAL that contributes to second language learning both linguistically and culturally. As Bland (2023) pointed out, this multimodal text type is beneficial for language and literacy development, as the illustrations aid in understanding both the verbal text and the cultural content. Graphic novels are powerful resources thoroughly researched in the fields of multimodal discourse analysis (e.g., Painter et al., 2013), literacy and language pedagogy (e.g., Bland, 2023), and literary and stylistics studies (e.g., Nodelman, 1988). Approaching multimodal texts from a multiliteracies perspective "provides a powerful foundation for synaesthesia, or learning that emerges from mode switching, moving backward and forwards between representations in text, image, sound, gesture, object, and space" (Cope & Kalantzis, 2015, p. 3).

Graphic novels are often viewed in comparison to comic books. Their fundamental elements comprise panels with visuals, verbal text, and gutters (Rimmereide, 2021). In graphic novels, as in comics, the framed panels are the most basic units that build up the narrative. Verbal texts appear either in speech or thought balloons (expressing dialogue or thoughts), narrative captions, or onomatopoeias. According to McTaggart (2008), "all graphic novels are comic books, but not all comic books are graphic novels" (p. 31). Graphic novels use the comic form but are published as stand-alone books (Coats, 2017, p. 154), often addressing contemporary issues. In graphic novels, the visuals, layout, colours, and typography gain special meaning-making significance apart from the written text. Recognizing and discussing these elements in the classroom helps students develop their multimodal literacy skills.

Developing students' semiotic awareness (Towndrow et al., 2013) contributes to exploring intercultural, social, and emotional meanings. Working with these texts can be supported by dialogic teaching (Rimmereide, 2021), which, in turn, gives space for critical reflection and intercultural understanding. To successfully achieve such reading goals, teachers must possess an easily accessible pedagogic metalanguage to guide students during reading sessions.

5 Pedagogic metalanguage for working with multimodal narrative texts

Preparing students to approach multimodal texts critically requires a shared language informed by an adaptable analytical framework that scaffolds the understanding of meaning (Unsworth, 2008, 2014). Such stories build on the interplay of different meaning-making resources, resulting in complex new meanings that combine sociocultural knowledge with semiotic interpretation skills. Giving students the tools to access and critically reflect on these new meanings becomes possible when they learn the explicit pedagogic metalanguage (Rimmereide, 2021).

The New London Group (1996) identified four components of multiliteracies pedagogy: 1) situated practice, 2) overt instruction, 3) critical framing, and 4) transformed practice. "Overt instruction" develops an explicit metalanguage of vocabulary for discussing design elements (Unsworth 2006). Serafini (2014) explains that educators can successfully guide students in analysing, designing, and interpreting such complex texts. Thus, "metalanguage" refers to a set of terms for approaching, describing, and interpreting a "particular mode or system of meaning (for example, photography, written language, film, or painting) contained in multimodal ensembles" (Serafini, 2014, p. 17).

5.1 Adopting the Social Semiotic Multimodal Framework for a Pedagogic Metalanguage

To discuss the two YA graphic novels used in our teaching practices, we describe a pedagogic metalanguage framework that aims to facilitate the interpretation of multimodal texts, their intercultural and sociocultural meanings, and multimodality as a means of meaning-making.

5.1.1 Meaning-making Resources. As a starting point, it is essential to understand what meaning-making resources are present in a multimodal text. For this, we might use the term "mode" to refer to a channel of representation that is socially shaped and culturally given (Kress, 2010; Kress & van Leeuwen, 2001; O'Halloran et al., 2017). Modes include written text, image, colour, typography, moving image, sound, speech, and gesture. However, to fully engage with the meanings in texts, we need an approach which enables us to access their different aspects.

5.1.2 Metafunctions. In our engagement with multimodal narratives, a metafunctional approach to texts presents a starting point and offers guidance in understanding how texts work. The metafunctional approach to text analysis originates in systemic functional linguistics (Halliday, 1978) and was adapted to multimodal texts and analysis by Kress and van Leeuwen (1996/2006). Accordingly, all texts simultaneously carry three different kinds of meaning: 1) the ideational, as they are about something; 2) the interpersonal, focusing on how they interact with others; 3) and the textual, showing how they are organized in a certain way (Macken-Horarik, 2016). In multimodal analysis,

these metafunctions are renamed as 1) representational (ideational), 2) interactive (interpersonal), and 3) compositional (textual). In the process of creating a pedagogic metalanguage, researcher-teachers can explore these aspects by employing a set of simplified and specific questions that belong to each metafunctional category. Next, we describe how a metafunctional approach to texts can be adapted for classroom book discussions.

Students often describe the plot as the first step in engaging with a narrative. From a metafunctional perspective, this means uncovering the *representational* meaning by focusing on the participants and events (Macken-Horarik, 2016). Narratives unfold through actions, events, processes, or changes, which can usually be recognised by the presence of a vector, (i.e., a line connecting participants, such as an eyeline or a pointing hand in the visual domain of the narrative; Kress & van Leeuwen, 2006). Apart from participants, the presence and absence of depicted circumstances are also significant, as they either establish the setting or place emphasis on the participants (Heberle & Constanty, 2016). The key question related to this aspect is: What is the story about? In practice, this can be adapted with follow-up questions and probes suited to learners' level of English proficiency and interest in the reading. Moreover, all concrete referential questions fall into this category, such as: 'Where does the story take place? In what period or historical time does the story happen? The wording of the questions may vary according to the students' age and language level but remains similar.

Interactive meanings are based on the relationship between the viewer and the world, including participants and places which are visually accessible through the systems of contact (or focalization), social distance, attitude, and modality. As a first step, students might analyse the gaze of a character. In social semiotic multimodality, the gaze is usually described as either a *demand* or an *offer* image (Kress & van Leeuwen, 2006). For example, when a character looks directly at the viewer, we see 'demand' images; when they look away, we see 'offer' images, and we focus on what their gaze is directed at. In terms of social distance, different levels of intimacy or hierarchy can be represented through close-up, medium-shot, and long-shot images. Jewitt and Oyama (2001) highlight the importance of point of view through the example of frontal images, which are used to increase the viewer's identification and involvement with the participants in the image. Painter et al. (2013) introduce colour as a resource for interactive meanings that emotionally affect the viewer (Heberle & Constanty, 2016). Looking for interactive meanings in multimodal texts means focusing on evaluative meanings and understanding how the text "addresses us, makes us feel, see and judge" (Macken-Horarik, 2016, p. 90). The practical question exploring this aspect is: "How does this text speak to you?" An additional question might focus on the feelings the story evokes in learners, such as "How does the story make you feel?"

Finally, *compositional* meaning can be analysed through information value, framing, and salience. Information value refers to the placement of elements within a narrative. For example, we can analyse whether a component is placed on the

left, right, top, bottom, centre, or margins of a page (or double page). Kress and van Leeuwen (2006) explain that given information is typically placed on the left and new information on the right. The Ideal is usually placed at the top, while the Real is at the bottom. Framing refers to the representation of the elements of a composition, either as connected or separated (Jewitt & Oyama, 2001). Salience is used to analyse whether some elements in the composition are more conspicuous than others, which can be achieved through size, contrast, saturation, or colour. Focusing on compositional meaning reveals choices made by the author in organising meanings in the narrative or conceptual representation (Macken-Horarik, 2016). Questions such as "What is the central event in the story?" or "How is the text organized?" highlight textual information related to compositional meaning. Table 1 summarizes the meanings, their related main questions, and possible questions related to classroom use.

Table 1

Suggested classroom questions and meanings targeted by pedagogic metalanguage

Meanings targeted by the pedagogical metalanguage	Key main question	Possible related questions or follow-ups in the classroom
Representational/ideational meaning	What is the story about?	When does it happen? Where does it take place? Who are the people in the story? What is the context of the story? What are the main events? Are there any cultural references in the depicted circumstances (context)?
Interactive/interpersonal meaning	How does this story speak to you?	How does the story make you feel? How are the participants and places presented? How is the viewer/reader positioned through words and images? Do you feel close to the participants, or do they seem distant?
Compositional/textual meaning	How is the text organized?	What is the central event in the story? What parts of a page/double page are more eye-catching? Are there scenes in which certain characters or objects gain greater significance? How are they represented?

Interplay between image and text. In multimodal texts, the main purpose of text discussions is not to analyse the meanings represented separately in the verbal and visual modes but rather to understand the meanings created through the interplay of the various components. By focusing on these intermodal meanings, playful new meanings can be uncovered during text discussions. In multimodal narratives, the relationship between the verbal and the visual is unique in how the various channels complement each other while running in parallel or in contrast (McCloud, 1993; Nikolajeva & Scott, 2001; Nodelman 1988; Painter et al., 2013). In graphic novels, the intersection of these various resources opens up a space for cultural expressions and perspectives (Serafini

& Reid, 2024). As Rimmereide (2021) points out, emotions are often represented through facial expressions, colouring, shadowing, or onomatopoetic representations. Thus, the graphic novel designer's choices become part of an indirect relationship with the reader, who brings their own life experiences into the reading process. For this reason, visual resources go beyond the images in the graphic novel, as the use of colours, page layout, and typography becomes a significant feature of these books.

To exploit the interplay between the verbal and the visual for English language development, teachers can direct their students' attention to meanings encoded in these different resources. For example, during a class discussion, students can focus on a single panel, a page, or a double-page from a picture book or graphic novel. The following questions are relevant to such activities.

- Do the words and the images tell the same story?
- Is there an information gap between the words and the images?
- Are there any scenes in which the image shows something the words do not express?
- Are there any scenes in which the images extend the meaning of the words, or vice versa?
- Are there any scenes (pages or panels) in which the images show feelings not described in the words?
- Do the images help you understand the cultural context?

By providing such guiding questions, teachers can help students to engage explicitly with different meanings. In what follows, we describe how we integrated the metafunctional/intermodal approach into our own classroom work.

6 Two Graphic Ya Novel Examples with Pedagogical Implications for Exploring Multiliteracies

In this section, we introduce two multimodal texts along with suggestions for possible ways of employing the narratives to improve and broaden the multimodal literacy skills of EFL students. The activities focus on the perception of emotions and how this process is depicted or hinted at within the narratives. In doing so, the approach relies on the assumption that "intercultural learning is a lifelong process in which emotions play a significant role" (Jokikokko & Uitto, 2016, p. 1). The tasks illustrate how these books offer multilayered, engaging, and relatable narratives that EFL students can find meaningful.

We used these narratives at the university level with students of English Studies. The courses focused on language and multimodal literacy development as well as

intercultural learning. The graphic memoir *I Was Their American Dream* was used during three 90-minute sessions. The graphic novel *Jane, the Fox and Me* was used during one 90-minute session during a course focusing on multimodal analysis. The questions above were adapted for classroom use and could further be simplified or even translated for lower-level students.

6.1 *I Was Their American Dream* by Malaka Gharib

6.1.1 Theme/plot Summary. Malaka Gharib's 2017 graphic memoir, *I Was Their American Dream*, follows the author's path to embrace her multicultural and multiethnic heritage in a fast-changing contemporary American society where extremist voices are growing louder. It is a "quick book to go through, but there is a lot to digest" (Chen, 2019). Written and drawn by the author herself, the book consists of eight independent, standalone chapters that started as independent zines. A zine is a form of homemade publication emphasizing creativity and self-expression, using art to define priorities in life and connect to one's feelings. Each zine chapter covers an extended period in Gharib's life with its arcs, including her parents' arrival in the US as immigrants, their divorce due to different values and cultural beliefs, her high school years, college life in New York, her job, meeting Darren (her future husband), and the life they live together in Washington D.C. The memoir reexamines her parents' story to distinguish it from the traditional immigrant narrative while reconstructing ethnic spaces as a source of alternate identity for Gharib.

6.1.2 Multimodal Aspects of the Book. The comic book structure combines dialogue, narration, and pictures to create meaning at their intersection. In an interview, Gharib noted, "You need to use these skilfully and poetically to express what you're trying to land on" (Chen, 2019). Meaning is simultaneously constructed on the available visual, discursive, and spatial platforms, where they converge into a complex, dynamic system of meanings.

The book is inspired by zine art, which, by definition, is characterized by self-created publication that follows magazine art and style. Zines are of varied lengths, allowing the author to develop the content and topic to the extent necessary to complete an arc. According to Gharib, the initial phase of her writing was inspired by her teenage hobby of making zines on all the topics that interested her. As in zines or self-made mini magazines, the book's chapters are drawn and written so that every page, or at most a double-page spread, introduces a new issue, event, thought, or feeling. Comic book panels ensure a sequence of internal logic with text and imagery.

I Was Their American Dream reinterprets the path of understanding one's identity through simple, easy-to-understand text in panels, thought and speech bubbles, unembellished line drawings, primary colours and few shades, and linearly structured, zine-like chapters. The line drawings in red, white, blue, and turquoise emphasize the

untold aspects within the text. The colouring of the characters' hair in blue, red, and black complements the meanings conveyed through facial expressions. Rimmereide (2021) writes that "emotions can be revealed through facial expressions, colouring, shadowing, onomatopoetic representations," (p. 101) all of which Gharib makes full use.

Another aspect of multimodality in the memoir is Gharib's choice to prompt reader response as part of the flow of reading. Fun pages, recipes, game descriptions, or doll cutout patterns interrupt the text in almost every chapter. These allow the reader to pause the reading process and participate directly in the narrative flow of Gharib's personal memories by entering into a dialogue with the text. Zine art also encourages reader response and fosters the willingness to communicate about the text. The typography is Gharib's handwritten block capitals, making the memoir look like a personal diary.

6.1.3 Contemporary/Intercultural/Social/Emotional Topics Addressed in the Book. *I Was Their American Dream* presents Gharib's childhood, teenage, and early adulthood years. It reads as a personal diary with very few event descriptions and more focus on understanding and getting in touch with herself and her emotions concerning events over which she had no control. The memoir addresses many contemporary topics related to growing up in a multiethnic family in the contemporary U.S., five of which we briefly discuss below.

6.1.3.1 Religion. Gharib's parents bring two distinct religions, Catholicism and Islam, into the family's cultural system, which their daughter must reconcile. It is a challenging situation communicated through the visual art of the book. "Out of respect for my parents, I tried to follow their faiths. I prayed with my dad, and I prayed with my mom" (Gharib, 2019, p. 46). These two straightforward clauses are written on the same panel, and the two drawings are split only by a vertical wavy line. This simplicity hides a subtly hinted, incredibly intricate system of faith that has to be reconciled in a single identity. Simplified representations of religious objects that appear throughout the book function as metonymic devices and stand for a complex set of emotional experiences.

6.1.3.2 Choice. One area in which the book discusses the anatomy of making decisions and choosing from available options is ethnic identity. Part of the description of Gharib's metamorphosis from ethnic to white and white to ethnic is traceable in the off-story tools such as fun pages, games, or activity pages. The paper doll cutout with outfits (Gharib, 2019, pp. 96-97) or the recipes and games not only illustrate the story but also offer a colourfully illustrated vantage point which explains Gharib's identity work.

6.1.3.3 Curiosity. While her parents' unfulfilled dreams deeply influence Gharib's childhood, her curiosity about how culture and traditions define who we are helps to balance this influence. All eight chapters present situations where curiosity helps her to gain crucial insights into her developing self.

6.1.3.4 Sense of Self. The sense of self and self-sameness are central questions of remembering and the mnemonic practice in Gharib's memoir. Visual elements and graphic art take on particular importance at this stage, as the often-untold narrative structures are expressed through vectors such as gaze and movement. The reader is prompted to step beyond the verbal to grasp the painful process of understanding and accepting her true self.

6.1.4 Classroom Use. In this section, we briefly describe two tasks with activities that enhance students' multiliteracy development. The book was assigned to a group of fourth-year teacher-trainee students who did not need scaffolding for the text or the tasks. However, our practice shows that the book can be used with B1-level students aged 13 and older. Since the memoir recalls Gharib's life from the age of six, it is relatable to all age groups, even adults.

6.1.4.1 Microaggressions Bingo and Related Digital Storytelling. One of the game pages in Gharib's memoir presents a bingo, titled "Microaggressions Bingo," in which the author collected the situations where she faced negative side comments that she felt were hurtful. The real-life-based scenarios are very simple and straightforward, with few words and drawings. This simplicity makes them easy to complement, interpret, or use as prompts to reflect on the impact of microaggressions. Activities related to this part aim to strengthen students' understanding of how it feels to be verbally harassed and to probe possible responses.

> **Activity 1.** Based on the questions outlined in Table 1, students identify representational, interpersonal, and compositional meanings in the Microaggressions Bingo. Students form groups focusing on one type of meaning and go through the questions while taking notes. Their answers reveal how the semiotic modes of meaning-making are intertwined even in simple image-text combinations to construct and represent complex human behaviour. Answers are factual and expressed in simple, straightforward language, as there is no need to go into speculative or hypothetical descriptions.
>
> **Activity 2**. Students work in pairs and choose one microaggression that they will work with. Their task is to write a storyboard introducing and unfolding the circumstances under which the sentence can appear.
>
> **Activity 3.** Using their initial ideas, students then create a 1-2 minute digital story. During the screening session, students discuss their work and explain how it relates to their lives. The follow-up task includes a review of two chosen digital stories, in which students examine how the digital stories speak to them.

6.1.4.2 Zine Art. Creating zine art enhances responses to the text and offers an easily applicable, relevant technique that can be employed in the EFL classroom. The task integrates language use with creative arts and even crafts if students wish to do so.

This aims to encourage students to create a zine related to one of the contemporary topics mentioned in the book. The zine should take the form of an imagined diary.

> Activity 1. Identify one memory in Malaka's story that you feel close to for some reason. Explain why you chose that memory.
>
> Activity 2. Create a zine in which you imagine yourself in that situation. Illustrate your work with clippings, photos, and drawings.

The digital story and the zine art both focus on multimodal meaning-making, allowing students to experiment with making connections between images and verbal texts in a relevant way. They use language without explicitly focusing on form, and the natural communication involves their own lives and concerns foregrounded by the reading experience.

6.2 A Graphic Novel about Bullying and Friendship: *Jane, the Fox and Me* by Fanny Britt (author) and Isabelle Arsenault (illustrator)

6.2.1 Theme/plot Summary. *Jane, the Fox and Me* tells the story of a young girl named Hélène who struggles with being bullied at school by a clique of girls. Hélène finds refuge in literature, namely *Jane Eyre* by Charlotte Brontë. Jane becomes both a fictional friend and a motivating character whose resilience and strength counterbalance Hélène's her vulnerability and loneliness.

6.2.2 Multimodal Aspects of the Book. The graphic novel combines hand-drawn images in panels of various sizes with language in different types of handwriting: all caps for narrative texts, large handwritten fonts for texts written on the school wall, and cursive for spoken language in speech bubbles. The story of *Jane Eyre* within the story has yet another font type. Apart from this powerful use of fonts, the book also makes deliberate use of colours and figure size. Compositionally, essential scenes are often given full-size panels. In terms of the use of colour, the monochrome panels depict the daily life of the main character, while other worlds, symbols, and significant turning points are represented in colour. Besides their symbolic function, the colours also create a distinct atmosphere influencing the viewer's relationship with the story.

The most powerful aspect of this graphic novel is the combination of two aspects of Hélène's life. The black-and-white panels depict Hélène's difficult daily life at school, while the contrasting full-colour images represent scenes from or inspired by *Jane Eyre*. When her class goes on a camping trip, Hélène is teased and humiliated by the other girls, prompting her to move to the outcasts' tent. However, her escape into the fictional world no longer gives her the support she needs. One night, during a walk, Hélène encounters a wild fox, which turns out to be a life-changing event for her. In her monochrome world, the red fox emerges as the only character depicted in full colour, carrying symbolic implications. In the same tent, Hélène becomes friends with another

outcast. Through this relationship, she learns what real-life friendship is like. From this moment on, Hélène starts to grow and becomes more confident with the help of this new friendship. By the end of the story, colours appear everywhere as Hélène learns to accept herself.

6.2.3 Contemporary/Intercultural/Social/Emotional Topics Addressed in the Book. The story addresses the theme of bullying, but it does not explicitly show how the bullying students are dealt with in Hélène's life. Instead, we watch her become more confident and self-accepting as she discovers kindred spirits such as her new friend, Geraldine. Finding refuge in friendship, and thus becoming stronger, becomes the answer to bullying in the story.

Interculturally, students can learn about life in a bilingual city. Although not explicitly mentioned in the story, it is set in Montréal in the French-speaking province of Québec, Canada. The graphic novel is a illustrative example of how contextual clues can reveal the setting of a story, such as French and English names and images of a typical Canadian countryside.

6.2.4 Classroom Use. This book provides an excellent introduction to both social-emotional issues and intercultural experiences by presenting a story of self-discovery and finding friendship. It also illustrates how graphic novels combine a wide range of meaning-making resources to create rich reading experiences. Notably, this book can be assigned for individual reading or group reading, with the outcome of a book presentation on its themes and multimodal features. After such a presentation, students can prepare a book review for others to read.

In the classroom, we first focused on the visual features of the book. We looked at the cover and predicted what the narrative was about. Then, the students were asked to leaf through the book to gain a general understanding of the characters, setting, and storyline, focusing on the use of colour and written text. They noticed that the black-and-white and fully coloured pages were meaningful and explored the reason behind this. Then, they highlighted the handwritten style of the text as well as the use of graffiti. At this stage, meanings detected in the visual style, colours, and typography helped students to engage with the atmosphere and set the narrative's mood. After reading either part or all of the narrative, the students focused more on the representational meaning, identifying who the characters are, where the story is set, and what narrative events took place. These insights, together with the already discussed visual meanings, shifted focus on how Jane, the main character of the book, feels and how she faces the challenges in her life. This led to discussions on topics such as classroom and group dynamics, bullying, making friends, and becoming resilient. The students also discussed the benefits and challenges of living in a bilingual country. During the discussion, the students heavily relied on the guiding questions derived from the metafunctional analysis presented in Table 1 to engage with the multiple layers of meaning within the graphic novel.

Conclusions

In this chapter, we aimed to introduce a pedagogic approach informed by social semiotic multimodality and narrative studies to the EFL classroom to develop multiliteracies and intercultural skills in students. We have argued for the integration of narratives into language and literacy pedagogy and introduced two graphic novels as powerful and influential multimodal narrative texts suitable for all levels of English as a foreign language education. Based on a social semiotic multimodal approach to meaning-making and pedagogy, the significance of an accessible pedagogic metalanguage was introduced for classroom use. With the help of this pedagogic multimodal metalanguage, students can be guided in their interactions with multimodal texts, such as graphic novels, in classroom discussions.

In the second part of the paper, we illustrated how such goals can be implemented by describing two examples of YA literature from our teaching practice in higher education. We have found that graphic novels are among the most suitable literary genres to help teenagers and young adults discover and understand the power of reading in multimodal meaning-making. Our approach suggests that effective scaffolding in this process arises from teaching multimodal reading using a pedagogic metalanguage, which enables students to bridge the gap between the visual and the written. Understanding these new combinations of meaning guides students through dialogic explorations, while the engaging activities based on these books become sites for multimodal, intercultural, and social-emotional learning.

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9

From Swamp to Screen: A Comparative Study of Pun Translation in the Hungarian and Portuguese Dubbed Versions of *Shrek*

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Abstract

Translators as cultural mediators (Hatim & Mason, 1990) must preserve the nuances of the source text while adapting it to the contexts of the target audiences. Film translation is a unique and typical form of multimodal translation (Chaume, 2012) in which the interaction of three modes (linguistic, visual, and audio) conveys the message within a complex semiotic framework (Pérez-González, 2014). Nida's (1964) dynamic equivalency theory suggests that the intended meaning, emotions, and the overall impact of the source should be transferred in a way that resonates with the target audience. This case study of the dubbed versions of *Shrek* in Hungarian and European Portuguese discusses the audiovisual translation of puns to (i) explore recurring challenges in translating English-language puns within audiovisual constraints, (ii) identify which translation reflects more culturally diverse solutions, and (iii) determine how (if at all) the translated pieces follow Nida's (1964) dynamic equivalence theory. Fifty-two instances of puns constituted the corpus for investigation. The translation options both in the Hungarian and Portuguese versions were analysed based on Delabastita's (1996b) classification of pun translation techniques. The findings suggest that formal equivalence may not be feasible in audiovisual translation, while dynamic equivalence proves essential. While the Portuguese translation demonstrates more structural fidelity to the source text, the Hungarian version exhibits more creative cultural adaptations and is more localised, leveraging cultural allusions. Although the Hungarian options for the puns diverge significantly from the original version, the translation remains dynamically equivalent. Key challenges include maintaining humour during lip-syncing and reconciling culturally specific puns with globalized contexts.

Keywords:

audiovisual translation, wordplay, film, dynamic equivalence

1 Introduction

Film translation represents a complex intersection of language, culture, and technology, requiring translators to navigate between audiovisual frameworks while maintaining the essence of the source text. In films, as multimodal media, meaning is conveyed through linguistic, visual, and auditory channels (cf. modes; Pérez-González, 2014), making translation a complex and unique form of multimodal translation (Chaume, 2012). Translators must conserve the subtle meanings of the original text while adjusting it to ensure that it connects with the intended audience. According to Delabastita (1996a) and Chiaro (2010), translating puns presents considerable obstacles to translators. Delabastita (1996a) claimed that puns are intertwined with the cultural and linguistic context of the source language, meaning that there is a high possibility that the culture-specific references in the source language and/or the specific linguistic forms (e.g., homonymy, homophony, idiomatic expressions) may not exist in the target language. Chiaro (2010) also confirmed that puns are intensely contextual and culture-specific, which may cause them to lose their effect in the target language. She further suggests that the translation of puns is difficult either because of the underlying ambiguity in the source language (i.e., the manipulation of various meanings of an expression), or linguistic peculiarities such as the phonetic, morphological, or syntactic characteristics of the language. These challenges evoke Nida's (1964) dynamic equivalence theory. Dynamic equivalence focuses on conveying the impact of the original message in a way that resonates with the target audience, that is, the translated text should have the same effect on the audience (the receptors) as the source text had on the original audience for which the source language text was intended.

Based on Nida's (1964) theory, the key challenge in the audiovisual translation of puns (or even the translation of audiovisual puns) is to achieve a balance between preserving the original impact while adapting the pun to the cultural and contextual nuances of the target language. The aim of this paper is the analysis of the 52 pun excerpts extracted from the dubbed versions of *Shrek* (2001) in order to identify the recurring pun translation patterns within the multimodal constrains of the Hungarian and European Portuguese versions and to determine which translation is closer to the original in terms of dynamic equivalence. The puns were categorized according to the list of methods for translating puns compiled by Delabastita (1996b).

The research questions are as follows:

1. What are the recurring pun translation patterns used by the translators?
2. How do different pun translation patterns reflect the cultural differences between the target languages (Hungarian and Portuguese)?
3. To what extent do these translations adhere to the principles of dynamic equivalence proposed by Nida (1964)?

By addressing these questions, the research seeks to contribute to a deeper understanding of how puns can be translated effectively in films and how the cultural nuances of humour are preserved or adjusted in the process. The research is relevant due to the contributions it can offer to translation studies regarding multimodality and pun translation. Comparing dubbing in two distinct languages (Hungarian and Portuguese) may cast light on how linguistic and cultural influences can affect translation choices by unveiling how the target-language cultures shape interpretation and meaning in humorous contexts. The results also contribute to the discussion about the practicality of Nida's (1964) theory of dynamic equivalence in a multimodal setting. From a practical perspective, the research may provide guidance for audiovisual translators on strategies they can use to balance linguistic fidelity and cultural transfer. The cross-linguistic and cross-cultural value of the research lies in its potential to elucidate unseen and unforeseen similarities between the two target languages in translation practice.

The paper's main sections following the introduction include a concise literary review, a description of the research methodology, and the discussion of the results.

2 Literature Review

In this section, the most important (and problematic) characteristics of audiovisual translation as a specific field of multimodal translation are addressed. It also provides a definition of pun and discusses Nida's dynamic equivalence theory, highlighting its relevance to audiovisual translation.

Audiovisual translation has been defined by various scholars in the past 20 years. This section of the paper showcases some of the most prevalent definitions, aiming at synthesizing the most important notions related to this branch of multimodal translation. Díaz Cintas (2003) defines audiovisual translation, which operates through auditory and visual channels, as the transfer meaning conveyed by multimodal texts into another language. It is considered multimodal due to the continuous interplay between auditory, visual, and linguistic modes. This process is described by Gambier (2003) as a semiotic interaction between image, sound, and text. Chaume (2012) explicates this interaction as one in which verbal and non-verbal signs are not only interconnected but also interdependent. For example, to form a coherent message from a dialogue between characters, the audience needs to consider the facial expressions and gestures, while the message encoded in the spoken language can be amplified by sound effects or background music. This clearly communicates some of the principles of multimodality: the interaction of various modes during the communication process to create a message (Jewitt, 2009). O'Sullivan (2018) defines audiovisual translation as the process through which media products (e.g., film or television programmes) are made accessible to international audiences through the transformation of verbal and non-verbal elements from the source language to the target language. These are the modern conceptualizations; however, there is a historical perspective that should also be addressed at this point: Jakobson's (1959) concept of translation.

Jakobson differentiated three subcategories within the framework of translation: intralingual, interlingual, and intersemiotic translation. The latter refers to the transmutation of non-verbal signs into verbal ones, or the other way round. This concept highlights how meaning can shift between semiotic modes (the channel of communication) as in the case of transforming a text into an auditory product or piece of visual art. Possible examples of intersemiotic translation include the adaptation of a written piece into a motion picture, where careful decisions must be made about which aspects of the text should be prioritized for the dialogues and how to support these through images, sounds, or the nor-verbal signs of the actors. The notion of intersemiotic translation somewhat laid the theoretical foundation for understanding how meaning transfer can be constructed through diverse systems of communication, both in intersemiotic translation from paper to screen and in audiovisual translation from screen to screen. Considering the above definitions, the multimodal essence of audiovisual translation is underlined with the strong interplay between language, visuals, and sounds.

Even though audiovisual translation centres around the interaction between various modes throughout the translation process, equivalence must also be discussed, as in all forms of translation. Measurable equivalence is crucial for the understanding of how meaning is adapted across languages, modes, and cultures. However, in contrast with text-to-text-translation, at times it is difficult to measure equivalence in multimodal translation. At this point, Nida's (1964) dynamic equivalence theory should be introduced.

Unlike formal equivalence, where the focus is on preserving the exact wording and structure of the source text, dynamic equivalence emphasizes the importance of conveying meaning, message, and feelings in a way that elicits the same, or at least a similar, response from the target audience as it would from the source-language audience. Nida argued that translation should not be a mere word-for word rendering; rather, natural flow and readability should be the first priorities. In an audiovisual setting, dynamic equivalence allows for greater flexibility regarding the intended message and how it is expressed in a given culture.

The following section explores a specific linguistic phenomenon: the act of punning and the challenges it poses throughout the translation process. Delabastita (1996b) defined wordplay as a broad category of linguistic phenomena in which structural elements are utilized to generate meaningful interaction between two (or more) linguistic structures with similar forms but distinct meanings (such as homophony). He proposed the following taxonomy: puns can be categorized according to homonymy (bat, bear), idiomatic expressions (kick the bucket, or piece of cake). According to Dore (2019), Delabastita's taxonomy also serves as an umbrella framework for cases of different linguistic structures with similar formal attributes, suggesting that the terms *wordplay* and *pun* should be treated interchangeably, even if minute differences exist

between them. Gottlieb (2016) claims that there can be no universal definition of pun or wordplay. He categorized puns similarly to Delabastita, though he suggested three subcategories for homonymy: lexical, collocational, and phrasal homonymy. Díaz Pérez (2018) suggests that the translation of puns is challenging due to their culture-bound nature and their dependency on the linguistic structure of the source language. The task becomes even more challenging in audiovisual translation, where a number of factors further hinder the translation process (e.g., lip-syncing, dramaturgy issues, scripting the text, etc.). According to Díaz Pérez (2018), translators must make an effort to recreate the cognitive effects triggered by the source product in the audience with the least possible processing effort required from the viewer. This closely aligns with Nida's (1964) dynamic equivalence theory and can also be connected to Sperber and Wilson's (1995) relevance theory, which claims that comprehension relies on context and prior knowledge of the world to infer the speakers' intentions and achieve the most relevant interpretation with the least cognitive effort.

In conclusion, due to the unique nature of both audiovisual translation and pun translation, and considering relevance theory, it is indeed impossible to expect formal equivalence. Thus, Nida's dynamic equivalence theory may serve as a focal point of audiovisual translation.

3 Methodology

For the case study, the original version of *Shrek* (2001) was chosen as the source product, and 52 pun items were extracted with time codes. The two dubbed versions in Hungarian and Portuguese were examined in regard to the 52 extracted pun elements from the original version.

It is important to note that the reason for choosing the Portuguese dubbing was twofold: on the one hand, in Portugal, dubbing is rare, as films are mostly subtitled, thus the dubbing culture is less developed than in Hungary, which is a difference that may provide valuable insight into how cultural and industrial contexts may influence translation strategies; on the other hand, Portuguese was selected as it is a language familiar to the authors, which made a detailed and accurate linguistic and cultural analysis possible. The pun items were selected based on both cultural references and linguistic considerations. Furthermore, both dubbed versions were carefully reviewed to identify pun items that are not present in the English version but were added through the dubbing process.

After these items were extracted, the following translation operations, based on Delabastita's (1996b) compilation of methods for translating puns, were applied to categorize the items for analysis (Table 1):

Table 1

Compilation of translation methods for pun translation

Category	Abbreviation	Explanation
pun to pun	P-P	a pun is translated as a pun; its semantic, formal, or textual function may be different from the original
pun to non-pun	P-NP	a pun is translated as a non-pun phrase that either maintains the original meaning in a non-punning way or the meaning is replaced entirely, even to the point of unrecognizability
pun to related rhetorical device	P-RRD	a pun is substituted with a rhetorical device (e.g., alliteration, rhyme, irony) that aims to replicate the source text's effect
pun to zero	P-0	a pun or the lines containing it are simply omitted
source-text pun to target-text pun	STP-TTP	a pun is translated in such a way that both its structure and humour remain intact
non-pun to pun	NP-P	non-pun content is translated in a way that it becomes a pun in the target language mostly as a compensation for the loss of puns elsewhere in the text
zero to pun	0-P	a new pun is added without direct reference or justification in the source, except for compensation

There were 52 items identified in the English source-language film. These were categorized according to the above operations for both the Hungarian and Portuguese versions. Two new categories not included in Delabastita's (1996b) taxonomy were also introduced: NP-RRD, used to code instances when a non-pun was translated as a related rhetorical device, such as irony, rhyme, or *eszperente* (words containing only the vowel *e*); and RRD-RRD, used for cases when a related rhetorical device was translated as another related rhetorical device.

Although the number of operations can be expressed with numeric data, the data set is not comparable, as the 52 items yielded 77 solutions. In addition, the categorization may involve a degree of subjectivity, as there are items on the list that could fit into more than one category, and oftentimes the differences between certain categories are very subtle. Therefore, due to the fact that quantitative analysis could only reveal prevailing tendencies, a qualitative approach was adopted for the analysis.

To understand the differences between the Portuguese and Hungarian translation options, it should be noted that the Hungarian dubbing traditions are intensely rooted

in domesticating strategies, English-language cultural references are often adjusted to local references; however, they are more frequently replaced with Hungarian equivalents to enhance the effect for a broader audience. This can be attributed to the fact that Hungarian, as a non-Indo-European language, exhibits considerable structural differences from the Indo-European Portuguese (cf. Dallos, 2018; Klaudy, 2003; Petróczi & Főző, 2019). On the other hand, dubbing in Portugal (to European Portuguese) preserves the source-culture elements more visibly, indicating a preference to maintain the foreign flavour (Chaume, 2012). Consequently, audiences in the two countries are accustomed to diverging traditions: in Hungary, localized humour and creative adaptations are more accepted, while Portuguese audiences are generally more receptive to cultural otherness.

4 Results

A grid was compiled with the time codes for each pun, the original lines, the translated versions, and notes on the operation or method used for the translation. The following chart offers a summary of the operations. In Table 2 (next page), the second column summarizes the operations applied in the English-to-Hungarian translation, the third column summarizes the operations applied during English-to-Portuguese translation, while the fourth column summarizes the operations applied in the translations from English into both Hungarian and Portuguese.

The last category in the table, labelled “NP-P/RRD in Ld1”, is an addition to Delabastita’s taxonomy (1996b). It indicates that a non-pun utterance in the source language was translated into only one of the dubbing languages, either as a pun or a related rhetorical device. As such, if this was present in one language only, it was then rendered as a non-pun or zero in the other. These items could also be included in the “both” category. This is the reason why the five items (NP in English and P/RRD in Hungarian, while remaining NP in Portuguese) are represented in all three columns in the chart.

The total number of Hungarian-only translation operation cases is 25, while the Portuguese-only cases is nine, and those present in both languages is 42. There is a noteworthy difference in how the puns are preserved, altered, or omitted across the two translations, with the Hungarian version exhibiting a higher number of retained or transformed puns compared to the Portuguese version. The pun-to-pun operation occurs most frequently when both languages are considered together, with a total of 25 cases. There is only one case in which puns are explicitly removed without any rhetorical replacement in both languages. Additionally, there are nine pun-to-related-rhetoric-device cases in Hungarian, only one in Portuguese, and six cases in the “both” category.

Table 2

Summary of the Results

Translation	English to Hungarian	English to Portuguese	Both
P-P	2	0	25
P-NP	0	0	1
P-RRD	9	1	6
P-0	0	1	0
STP-TTP	0	2	1
NP-P	7	0	0
0-P	0	0	0
ET	0	0	0
NP-RRD	2	0	0
RRD-RRD	0	0	4
NP-P/RRD in Ld1*	5	5 (NP -NP)	5
TOTAL	25	9	42

*Note. The non-pun-to-pun or rhetoric-device operation is only present in one of the dubbing languages, while in the other language the operation is most probably a NP-NP or NP-0.

Hungarian tends to replace a pun with another form of wordplay or humour more frequently than Portuguese, which seemingly relies on this strategy less often. With one case of pun-to-zero-translation operation in Portuguese and zero in Hungarian, Portuguese is slightly more likely to completely omit puns. However, there are two cases in which the pun was directly recreated: (none in Hungarian and only one in the "both" category (STP to TTP). The seven Hungarian cases, compared to zero in Portuguese and zero in both languages, in the non-pun-to-pun category (referring to the addition of a new pun where there was none in the original) suggest that the Hungarian dubbing script actively introduces new puns. As for instances where a non-pun was replaced with a related rhetorical device, there are two cases in the Hungarian dubbing. In all four cases where a related rhetorical device was translated, both the Hungarian and Portuguese versions retained the devices, suggesting that when a rhetorical device already exists, translators in both languages tend to adapt it instead of eliminating it. In the category where a non-pun becomes a pun or rhetorical device in only one language, there were five occurrences in Hungarian, indicating that the Hungarian translator makes more effort to introduce context-based humour, while Portuguese tends to maintain the original structure without adding wordplay. Although the number of cases is small, the proportions remain notable: for example, a single occurrence treated in both languages constitutes 100% of the given data, thus the identification of tendencies can be justified.

In the following sections, examples of the above strategies are illustrated with short comparative explanations of how the puns were treated in the target languages.

PUN to PUN translation:

English: *muffin man* (17:45)

Hungarian: *nagylepény* (big flatbread)

Portuguese: *a padeirinha* (butter cookie or little baker girl)

In English, the pun is a reference to the traditional English nursery rhyme, whereas in Hungarian the humour derives from the homonymy of two Hungarian words: *lepény* (flatbread) and *legény* (lad, or in a rural context a strong, unmarried young man). A flatbread is flat, so even though it may be large, it is not stable or strong, creating a paradoxical meaning in this expression. The Portuguese expression, on the other hand, refers to two things: a typical Portuguese butter cookie or a small loaf of bread (*-inha* being a diminutive suffix), both of which are feminine nouns. On the other hand, it can also mean "a little baker girl." Thus, the humour of the "little and fragile muffin man" is retained through homonymy and paradox in Hungarian, and in Portuguese through wordplay involving double meaning and through the implication of femininity.

PUN to NON-PUN translation:

English: *fairy tale things* (15:33)

Hungarian: *mesebeli lények* (fairytale creatures)

Portuguese: *criaturas fictícias* (fictional creatures)

In the English version, direct sarcasm is conveyed through the intentional loss of specificity (generalising a concrete entity into a "thing"), rendering the fairy tale creatures insignificant. The translations into both Hungarian and Portuguese preserve the original meaning of the utterance but replace the vague, humorous generalization with explicit references to the creatures. As a result, the comic effect of the generalization is somewhat lost in translation.

PUN to RELATED RETHOCRICAL DEVICE translation:

English: *You was really, really something back there.* (08:04)

Hungarian: *Ezeket kerek perec elkergetted!* (You chased these away in no time.)

Portuguese: *Foste fantástico ali atrás.* (You were amazing back there.)

The humour in the English version is implied by the intention of the speaker, which is sweet-talking flattery that tries to sound grandiose using diminutive language ("something" and grammatical inaccuracy). Donkey speaks *eszperente* in the Hungarian translation of the script, a playful linguistic game in which the speaker communicates using expressions that contain only the letter *e*. This use of playful language was a characteristic feature of a popular Hungarian cartoon character, Master Mekk, who was a goat. Having Donkey talk like Master Mekk lends extra playfulness to the character and serves as a successful rhetorical device that gives the Hungarian dubbing an additional humorous touch (cf. Nida, 1964). In the Portuguese version, the related rhetorical device is the alliteration of *foste - fantástico* and *ali - atrás*.

PUN to ZERO translation:

English: *They was trippin' over themselves like babes*. (08:19)

Hungarian: *Eltűntek mint szürke szamár a ködben*. (They disappeared like a grey donkey in the fog.)

Portuguese: *Tropeçaram uns nos outros*. (They tripped over each other.)

This utterance by Donkey in English is a humorous reflection on the previous scene in which the king's army fled the premises when catching sight of Shrek. The humour lies in the faulty use of grammar and in comparing the soldiers to cowardly girls (a notably sexist expression). In Portuguese, this element is omitted, and the event is described literally, resulting in the deliberate loss of the pun. The Hungarian version uses a related rhetorical device, translating the source line into an existing Hungarian proverb meaning that something vanishes completely. To add to the playfulness of the translation, the metaphor's vehicle is a grey donkey, much like Donkey the character.

SOURCE-TEXT PUN to TARGET-TEXT PUN translation:

English: *There are those who think a little of him*. (44:42)

Hungarian: *Vannak akik nem tartják túl nagyra*. (There are some who don't think much of him.)

Portuguese: *Há quem faça pouco dele*. (There are those who make little of him.)

In the above examples, the pun is translated in a way that both the structure and humour are kept intact in the target languages. The humour here refers to size and "measurements" between men. Shrek repeatedly makes ridiculing references to the height and other measures of Lord Farquaad, who is a very short and incapable man.

NON-PUN to PUN translation:

English: *And I'm not goin' out there myself.* (08:35)

Hungarian: *Csak az ökör iszik magában*. (Only oxen drink alone.)

Portuguese: *E não vou voltar pra lá sozinho.* (And I'm not going back there alone.)

In this scene, the original English utterance is not humorous and is rendered the same way in Portuguese. However, the Hungarian translation introduces a full pun through a proverb meaning "only fools drink alone", implying that only foolish people do typically social things alone.

NON-PUN to RELATED RETHOCRICAL DEVICE translation:

English: *Are you talking to me?* (08:06)

Hungarian: *Nekem mekegsz?* (Are you bleating at me?)

Portuguese: *Estás a falar ... comigo?* (Are you talking to me?)

A non-humorous expression (non-pun) is translated as a non-pun in the Portuguese version, whereas the Hungarian translation employs a related rhetorical device using *eszperente* and metaphorical language, describing Donkey as "bleating" instead of "braying".

RELATED RETHOCRICAL DEVICE to RELATED RETHOCRICAL DEVICE translation:

English: *But thy deed is great and thine heart is pure.* (41:06)

Hungarian: *Tetted dicső és szíved nemes vala*. (Thy deed was glorious, and thy heart was noble.)

Portuguese: *Mas o vosso feito é immenso e o vosso coração é puro.* (Thy deed was glorious, and thy heart was noble.)

The related rhetorical device in these utterances is the old-fashioned use of language, most probably from the Middle Ages, associated with courtesy.

Based on the above, several conclusions can be drawn. The most significant is that the Hungarian translator appears more open to maintaining puns, while the Portuguese translator tends to avoid adding them. The flow of the Hungarian translation is more playful, often due to the introduction of new puns and the use of a wide range of related rhetorical devices. The Hungarian translator demonstrates greater creativity by adding puns where none existed in the original. Although the translation solutions in Hungarian are noticeably bolder, this is not due to the academically unacceptable notion that Hungarian is a more special language than Portuguese. Rather, it may be

attributed to the fact that Hungarian has a completely different sentence structure from English, which is even further exacerbated by the distinctive features of dubbing and dubbing script dramaturgy (e.g., cropping, syllables, lip-syncing, lip position, lip articulation, etc.), allowing greater freedom to shift toward a more dynamic translation strategy. In the case of the film discussed, there was a substantial amount of cultural transfer during localization, exemplified by Donkey's use of *eszperente* as a reference to Master Mekk, a Hungarian animated character known for speaking this way. Projecting his personality onto Donkey adds extra layers of meaning and humour to the character. This intermodular allusion, which aligns with Nida's concept of dynamic equivalence, makes the Hungarian version considerably funnier for Hungarian viewers.

On the other hand, the Portuguese translation is more formal, with some cases of omission and relatively fewer transformations. The Portuguese translator was more likely to omit puns in order to maintain the formality of the original lines. This is understandable, as the Portuguese language exhibits certain formal, structural, and grammatical similarities with the original English language text. The Portuguese translation aims at formal equivalence by following English sentence structure; however, as a result, some of the humour is lost in the process. There are instances in which the English language non-pun lines made the insertion of puns possible; nevertheless, these opportunities were not utilized. An important observation is that in the Portuguese dubbing, during the scenes when Princess Fiona is saved by Shrek and the characters are newly acquainted, archaic and highly formal Portuguese is used (using the second-person plural verb conjugation to express the highest level of formality, which is not present in modern Portuguese). This corresponds to the use of 16th-17th-century Middle English.

These tendencies suggest that the Hungarian translator leans towards localisation and adaptation of humour, while the Portuguese translator tends to maintain a more neutral or formal approach. In terms of equivalence, the Hungarian version is likely to sound more dynamic, while the Portuguese version sounds more formal (cf. Nida, 1964).

5 Discussion

In discussing the research questions, the most frequently recurring pun translation patterns of the translators are the pun-to-pun, pun-to-related-rhetorical-device, and non-pun-to-pun (or related rhetorical device) translation operations, the latter case occurring in only one of the dubbing languages. In the Hungarian version, there are notable cases where non-punning are replaced with humorous ones, and rhetorical devices are added to non-punning lines. The translators seem to have made an effort to be adaptive, balancing fidelity within the framework of the audiovisual medium. An important note is that names not related to existing folk tradition are also translated into Hungarian (e.g., Farquaad [E, Pt], FarkVad [Hu]) but not into Portuguese.

The pun translation patterns reflect cultural differences between the target languages. The most prevalent observation is that due to the structural similarity of the Portuguese language to the source language, the Portuguese translator most likely adhered more closely to the original grammatical, lexical, and lexico-grammatical patterns, thereby achieving formal equivalence. Whether this is intentional or coincidental, deriving from the linguistic kinship of Portuguese and English, is an important question for further study. What is evident is that the Portuguese dubbing feels less localized. On the other hand, due to the structural distance between Hungarian and English (cf. Uralic vs. Indo-European languages), it may be seldom possible to achieve formal equivalence. This requires more significant changes, opening the door to playfulness and a more creative use of translation operations and strategies. Thus, the third research question concerning Nida's (1964) concept of dynamic equivalence can be answered: dynamic equivalence is highly prevalent in the Hungarian version, while the Portuguese version exhibits features of formal equivalence.

Another key finding is that although Delebastita's (1996b) taxonomy is easy to use for analysis, the data should be treated more qualitative than quantitatively, as some examples did not fit neatly into one category, especially when the humour was constructed jointly through image, sound, and text. Consequently, Delabastita's model should be further complemented by a more multimodal approach in order to enhance its applicability to film dubbing practices.

As humour often relies on the interplay between verbal language, visual gags, and sound effects, the findings demonstrate that the multimodal context plays a crucial role in shaping the translators' decisions. Therefore, to achieve a more comprehensive analysis of pun translation, further analysis is needed.

6 Conclusion

The paper demonstrates that the translation of puns in film dubbing is not merely a linguistic task but also a deeply cultural one. Translators must not only ensure that the meaning of the source text is preserved but must also adapt the humour to the cultural norms and expectations of the target audience. In this sense, dynamic equivalence (Nida, 1964) provides a useful framework for understanding how translators negotiate between linguistic and cultural fidelity, especially when working with puns. The findings highlight the importance of creativity and cultural sensitivity in the translation process, suggesting that a more localized, culturally informed approach (i.e., dynamic equivalence) can produce translations that resonate more strongly with target audiences.

The limitations of the research are twofold. On one hand, it is difficult to rely on the numerical data obtained, since translation is context, interpretation and creative decision-making dependent, and none of these can be objectively quantified perfectly. On the other hand, there may be cultural differences between Hungary and Portugal

(not to mention differences in dubbing culture and industrial factors) that might hinder the understanding of the translation choices in the Portuguese version.

The implication for further future research is that there are several examples of multimodal translation, such as the measurement jokes about Lord Farquaad, the use of refined language in a non-refined visual context, and the donkey character sounding like a goat in the Hungarian version, which support the view that audiovisual translation cannot be fully understood without taking multimodality into account (Chaume, 2012; Pérez-González, 2014).

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10

The Role of Localization in Translation: The Case of Advertisements for Marketing

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Abstract

This paper investigates the role of Localization in the translation of advertisements and its effects on Arabic speakers. It explores the effects of cultural differences on advertisement translation, the difficulties associated with socio-cultural and linguistic adaptation, and the strategies used to enable effective intercultural communication. The research employs a qualitative analysis of online advertisements originally produced in English and localized for an Arabic-Speaking audience. The findings showed that localization and adaptation in advertisements are crucial for their success in foreign markets in order to address cultural and religious differences (Nida & Taber, 1969/1974), which greatly impact the effectiveness and acceptance of campaign strategies. The paper emphasises the importance of cultural adaptation in advertisement translation and suggests practical recommendations for advertisers and translators to optimize their strategies in cross-cultural settings.

Keywords:

localization, cultural differences, cultural translation, advertisements, socio-cultural factors.

1 Introduction

In the current globalizing world amidst increasing media expansion, localization in translation has become an important tool for cross-cultural communication. Localization is not simple translation, as it strives to ensure appropriate adaptation to the language, cultural norms, and socio-political sensitivities of the target audience (Jiménez-Crespo, 2013; Mityagina & Volkova, 2019). Although translation is often linked with linguistic accuracy, it also entails maintaining pragmatic, cultural, contextual

equivalence between the source and the target text (Baker, 2018; Hatim & Mason, 1990; Nida & Taber, 1969, 1974). Thus, while translation is mainly concerned with meaning accuracy across languages, localization takes into account sociolinguistic factors, pragmatic considerations, and audience reception, which are important elements in fields such as news media, advertising, and digital content (Al-Mazrooa, 2018; Chidiac & Saliba, 2016).

Due to the growing digitization of media platforms, there is a rising demand for localized translations that connect with the target audience and convey the authenticity of the original message (Jiménez-Crespo, 2024). This is especially important in English-Arabic news translation, where linguistic and cultural differences require adaptation strategies to prevent misinterpretation and socio-political conflicts (Kashoob, 1995). As noted by Achkasov (2017), this highlights the importance of the localization concept, which has gained popularity in recent years, particularly as a method of modifying various types of content, including linguistic, cultural, social, economic, political, and legal aspects.

Associations such as the Localization Industry Standard Association and the Globalization and Localization Association have emphasized the significance of making a product linguistically and culturally appropriate to the target locale through eliminating or minimizing elements which may trigger local sensitivities (Fry & Lommel, 2003; Jiménez-Crespo, 2013). These private, non-profit associations stand as the leading bodies in the localization and internationalization industries, promoting best practices and language-technology standards for globalization.

In general, Arabic speaking audiences represent various backgrounds, yet they all have common values that are conditioned by the common language they speak, the religious ideology they follow, and the common historical narratives that inform their attitudes (Al-Mazrooa, 2018). To provide culturally-sensitive translations to such an audience, a strong command of both English and Arabic is not enough; the translator must also possess knowledge of Arabic cultural sensitivities, familiarity with the rhetorical conventions of the Arabic language, and an awareness of what is acceptable and what is expected in Arab speech.

1.1 Challenges of Localization in Advertising Translation

The global market requires advertising to employ effective cross-cultural communication strategies for successful marketing campaigns (Brooks, 2000). One particularly understudied issue is the process of translating advertisements from English into Arabic, as well as the translation and marketing challenges involved in making ads suitable for Arabic audiences. The key challenge in this regard is to avoid cultural, religious, and social sensitivities in Arabic-speaking markets; hence, adaptation is required which goes beyond simple translation (Haider & Alrousan, 2022; Jiménez-Crespo, 2013). In

many instances, Arabic audiences do not respond positively to the direct translation of English advertisements due to certain dissimilarities in values, customs, and perceptions (Guidère, 2000; Kashoob, 1995).

Localization not only involves linguistic transfer, but also necessitates the modification of language specific characteristics including visual, textual, and cultural elements in order to comply with the target audience's expectations (Jiménez-Crespo, 2024). Based on audiovisual translation and advertising research, culturally inappropriate advertisements often provoke audience rejection and fail to achieve the intended marketing impact (Haider & Alrousan, 2022; Kashoob, 1995). As such, it is advisable to carefully study localization methods to integrate the cultural differences of Arabic-speaking markets and thus increase communicative effectiveness.

The purpose of this study is to investigate how localization strategies affect the efficiency of translated advertisements for Arabic-speaking consumers. It explores the challenges of translating culturally sensitive elements, how localization enhances audience reception of advertising campaigns, and the implications of such adaptations on the overall impact of campaigns. Addressing this issue is essential to ensure that marketing messages are directed to appropriate cultural contexts without straying from the original brand message.

1.2 Research Questions

This study contributes to ongoing discussions on localization in translation studies, particularly in the field of advertising for Arabic-speaking audiences. Given the complexity of the cultural and linguistic difficulties involved in the translation of advertisements, this study offers a valuable approach to deepening the understanding of how localization strategies affect the audience reception and engagement (Guidère, 2000; Jiménez-Crespo, 2013). The study identifies key localization challenges and provides practical recommendations to researchers on how to improve cross-cultural communication, ensuring that translated advertisement localization matches the cultural norms and expectations of Arabic-speaking consumers (Haider & Alrousan, 2022; Kashoob, 1995).

The study seeks to answer the following questions:

1 How does localization affect the translation of advertisements for marketing to Arabic-speaking audiences?

2 What are the problematic areas encountered in localising advertisements from English to Arabic?

3 How can cultural, and linguistic difficulties be overcome to ensure effective cross-cultural communication through advertisements?

2 Literatature Review

2.1 Localization in Translation

Transferring meaning from one language to another involves a difficult and multifaceted process known as translation (Baker, 1992, 2018). Gambier and Van Doorslaer (2013) stated that translation is not only a linguistic endeavour, but also a cultural and social one, as translation always mediates between different cultures, ideological frameworks, as well as social norms. Historical, political, and ideological contexts influence translation, as the socio-cultural environment of a community can shape the translator's linguistic choices and ultimately the socio-cultural reception of the translated text (Gambier & Van Doorslaer, 2013).

Localization in translation is a form of cultural adaptation that aims to make the translated material functional and culturally acceptable to the target audience. Consequently, globalization necessitates localization: projects and clients rely on translators to bridge the source and target cultures while preserving the original intent of the source text (Jiménez-Crespo, 2013). Whereas translation is a transformation of the content to retain the original message, localization entails adaptation of the content so that it resonates with the societal and economic contexts of the target audience (Fry & Lommel, 2003).

Translation theories offer insights into localization strategies, particularly Venuti's (2017) concepts of domestication and foreignization. The purpose of domestication is to make the translated text familiar to the target audience by including cultural references, but foreignization tries to preserve the essence of the source culture, providing readers with a foreign experience (Venuti, 2017). Nord's (2005) functionalist approach to translation presents it as an interpersonal activity in which translation decisions are made depending on the function of the text and its target audience.

Another relevant distinction related to localization is that between semantic and communicative translation, as described by Newmark (1981). Localization goes beyond linguistic conversion, adapting the meaning of the content to fit the cultural, social, and pragmatic expectations of the target audience. Newmark (1981) explained that semantic translation guarantees accuracy and fidelity to the source text, in contrast to localization which falls back on communicative translation to ensure the message is meaningful and effective in the target language. These theories serve as a basis for understanding the localization process in which cultural fidelity and audience reception must be carefully balanced (Al-Mazrooa, 2018).

2.2 The Role of Localization in English-Arabic Translation

In translation from English to Arabic, the need for localization is particularly important due to the significant cultural and linguistic differences between the two languages.

Furthermore, Arabic, with its diglossic nature and strong socio-religious influence in society, requires considerable adaptation. Diglossia in Arabic reflects the substantial variation between Modern Standard Arabic (MSA) and different regional dialects, which complicates localization efforts (Kashoob, 1995). For example, an advertisement translated into MSA may be understood across the Arab world but would not necessarily resonate as deeply with those reading it as one adapted into Egyptian or Gulf Arabic. This variation emphasizes the importance of localization rather than simple translation, ensuring that language use is in line with the expectations of the audience and their cultural standards (Kashoob, 1995). Similarly, according to Chidiac and Saliba (2016), direct translation in advertising results in a loss of the emotional and persuasive influence of the original text; thus, in the Arab context, it is required to adapt the source text in accordance with Arab consumers' cultural expectations.

The process of localization in Arabic is not easy, as several linguistic, cultural, and technical challenges should be considered in the process. Linguistic adaptation is one primary concern, especially when using English source materials that employ idioms, humour, or wordplay that have no direct equivalents in Arabic (Haider & Alrousan, 2022). Cultural sensitivity presents another challenge, especially regarding elements such as gender roles, religious values, or social norms, which should be handled with great care to prevent misunderstandings or offense (Mityagina & Volkova, 2019). A semantic translation might preserve the exact meaning but fail to communicate the message naturally, whereas a communicative approach adapts content in order to be completely clear and culturally appropriate. For example, citing the French warning sign 'chien méchant,' Newmark (2022, p. 39) suggested that a communicative translation, such as 'Beware of the dog!' is required, noting that a semantic translation such as 'savage dog' would be less effective. The same case arises in Arabic, where the literal translation of the warning sign will not sound natural or clear. A localized, communicative translation such as 'احذر الكلاب الضالة' (back-translated as 'Beware of the wild dogs') ensures that the warning is properly understood.

Additionally, terminological inconsistencies present an additional challenge, as many English technical and business terms do not have direct equivalents in Arabic. Borrowing or transliteration, which are frequently used by translators, may not be easily understood by non-bilingual audiences (Jiménez-Crespo, 2013). For example, as noted by Al-Mazrooa (2018), the Arabic localization of digital interfaces often poses difficulties for translators with terms such as 'update' and 'refresh', which lack exact equivalents in Arabic. These terms need to be adapted or explained to make them understandable to users. The following section (2.3) explores these challenges in more detail.

2.3 Challenging Aspects in Cultural Translation

Translation between languages which belong to distinct cultures such as English and Arabic involves various challenges. Such challenges are encountered in areas such

as religion, politics, social traditions, and technical terms. Moreover, the situation is aggravated by the fact that English functions as a lingua franca (Crystal, 2003; Jenkins, 2007). Given that English is an international language, it cannot be tied to a single cultural influence. This makes cultural translation even more difficult, since translators must decide which cultural framework to consider while rendering English texts into Arabic (Kashoob, 1995).

2.3.1 Religion

One of the most complicated areas in the translation field is religion, as religious beliefs and rituals differ significantly from one religion to another, such as in prayer rituals, fasting practices, holy texts, places of worship, and dietary laws. For example, in Islam, Muslims perform five daily prayers (known as Salah) which include recitations, bowing, and prostration at specific times, facing Mecca. In Judaism, Jews pray three times a day, also including recitations at specific times, facing Jerusalem. In Christianity, pray practices are more varied, including recitations without specific times or specific directions.

Moreover, one religion may allow something that another prohibits, that is, what is offensive to some may not be offensive to others. For instance, in Islam, it is forbidden to eat pork and drink alcohol, while the consumption of Halal meat (i.e., animals that are slaughtered according to Islamic laws) is permitted. In Judaism, Kosher laws (i.e., animals that are slaughtered according to Jewish law) impose similar restrictions that prevent eating pork, shellfish, and mixing meat with dairy, while alcohol is allowed in religious ceremonies. In contrast, in general there are no dietary restrictions in Christianity, and both pork and alcohol are permitted. Some religious terms may also be difficult to understand for other religions or societies. For example, there is no exact counterpart for the Islamic word 'Umrah' (عُمرة) in Christianity. When rendering this term in English for an audience unfamiliar with Islamic practices, a translator would need to provide additional context as follows: Umrah, a minor pilgrimage to Mecca, performed outside the prescribed period of Hajj (i.e., a major pilgrimage performed once a year at a specific time). This explanation conveys the notion of the term while preserving cultural sensitivity (Kashoob, 1995).

The same can be said for the translation of the Quran, which has long been a topic of scholarly debate. Quranic verses are highly rhetorical, rich in metaphor, and characterized by special phonetic and rhythmic structures which are often regarded as untranslatable in their entirety. According to Nida and Taber (1969), religious texts should be informative but should also reflect the 'expressive' and 'imperative' features of the original message (p. 24). Furthermore, Al-Mazrooa (2018) argued that the Arabic localization of religious content such as the Quran necessitates a balance between foreignization and domestication strategies to avoid distorting meaning.

2.3.2 Politics

Political concepts often lack a one-to-one equivalent across cultures. For instance, the phrase '10 Downing Street declares,' which is a reference to the British Prime Minister's Office, may be unfamiliar to Arabic speakers. Translators usually render it in Arabic as 'تعلن الحكومة البريطانية' (i.e., the British government declares), a more meaningful equivalent to Arabic audiences (Kashoob, 1995). Similarly, the phrase 'the Home Office declares,' which refers to the ministerial department of the British Government, is understood by intellectuals worldwide, particularly those involved in politics but may need to be explained when translated into Arabic, and probably into many other languages in general, since the term for the institution may not be widely recognized. In Arabic, the translation of the phrase is often 'the Ministry of Interior,' adjusting to the target context.

Likewise, political party structures vary across cultures. The British concept of 'shadow ministers' does not exist in most contemporary Arab political systems. Therefore, an equivalent descriptive translation, such as 'الوزراء البدلاء' (i.e., alternative ministers) should be accompanied by contextual explanation to ensure clarity (Kashoob, 1995).

2.3.3 Social Traditions and Culture

Every society has its own traditions and concepts shaped by its way of life and environment. Over time, these elements become an unconscious part of the society's behaviour and habits. As a result, what exists in one society may not necessarily exist in another. It is this uniqueness that makes people from different societies and backgrounds curious about others (Kashoob, 1995). A case in point is the Arabic expression "naeeman", commonly said to someone who has just had a shower or a haircut as a good omen or gesture of goodwill. 'Naeeman' is derived from the Arabic word 'naeem', meaning 'paradise' and 'blessing', which echoes the expression 'cleanliness is next to godliness,' congratulating someone on their hygiene. This concept does not exist in many other cultures and is therefore very difficult to translate. A literal translated of this concept into English such as 'have a prosperous life' would likely sound very odd to a person from another culture.

The way social roles and relationships play out in Arabic cultures differ significantly from from those of other cultures, thus resulting in complications in translation. Kinship terms in Arabic are a classic example, and their use is of relevant importance. The Arabic word for 'father's brother' is 'عم' /'am/ and 'mother's brother' is 'خال' /khal/, whereas the English language uses the single word 'uncle' for both. Similarly, the Arabic word for 'father's sister' is 'عمة' /'ama/ and 'mother's sister' is 'خالة' /khala/, whereas English again uses the word 'aunt' for both. Hence, the translation of kinship references can be ambiguous and may result in a loss of cultural nuance (Kashoob, 1995).

Furthermore, the Arabic terms of social respect or politeness are not always directly translatable into English. For example, an elderly man is often called 'عم' (uncle) and an

elderly woman 'خالة' (aunt) as a form of respect. Yet, rendering these terms literally in English can be confusing, since the cultural meaning may not carry over (Kashoob, 1995).

2.3.4 Social Beliefs

Societies that belong to completely different cultures tend to have different beliefs. In other words, a belief that is considered positive in some societies may be viewed as negative or neutral in others. Different cultures have varying beliefs about animals, colours, and symbols, and translation choices are governed by these beliefs (Kashoob, 1995).

In British culture, dogs are viewed as loyal pets and are traditionally kept inside households. The concept of the dog in the Arab world is almost identical to that of the UK in terms of loyalty and superior protection; however, dogs are viewed as unclean and are typically kept outside the home. Islamic beliefs state that if someone is touched by a dog, they must perform ablution (i.e., the ritual washing of body parts before performing prayers as prescribed by Islamic law) and should wash any clothes that were touched by the dog. Hence, it is clear that the meanings and beliefs associated with the concept of the dog vary across the two cultures.

2.3.5 Technical Terms

Translation of technical terms in science and technology is particularly difficult due to the evolving nature of their domains. Generally, new concepts are often first introduced in English, requiring Arabic translators to decide whether to adopt the terms as loanwords, translate them into Arabic, or develop new equivalents.

Landsberg (1976) pointed out that scientific truths can be expressed linguistically only when there are similar symbolic distinctions in both the source and target languages. If there is no direct equivalent, the only options are paraphrasing or the use of additional symbols. For instance, the word "fax" is transliterated into Arabic as 'فاكس' instead of being conceptually translated (Kashoob, 1995).

This issue has also been addressed by some localization studies. Localization of technical content, as discussed by Jiménez-Crespo (2013), requires translators to be aware of industry-specific conventions and user expectations. This is especially relevant for digital and software translation, in which terminological consistency is crucial (Fry & Lommel, 2003).

Nonetheless, some scholars, such as Kashoob (1995), claim that Arabic is capable of creating its own terms without resorting to transliterations. For example, he suggested translating the term fax as 'البرق الطابع', which means 'lightning printer,' conveying the concept without depending on direct linguistic equivalence.

3 Methodology

3.1 Data Collection and Sampling

The data for this study includes six English language advertisements published on YouTube. The selected advertisements are related to different sectors, including fashion, food, and personal care. These advertisements were chosen for their cultural significance and the clear contrasts they present between Arabic and Western cultural norms. The measures included for selecting the advertisements include their suitability to localization and cultural adaptation, presence of linguistics and visual elements which necessitate adjustments for Arabic-speaking audiences, and variation regarding themes related to gender representation and religious sensitivities.

3.2 Data Analysis Procedures

Data analysis was performed at two levels using mainly qualitative analysis. First, the researcher performed a preliminary analysis involving an initial examination of each advertisement to assess overall themes, messages, and the proposed effect on the target audience. Second, the advertisements were analysed in greater detail following Al-Mazrooa's (2018) integrative localization framework, which focuses on the interplay between the linguistic, cultural, communicative, and technical aspects of Arabic localisation. The analysis began with an exploration of the different linguistic techniques such as word choice, phrase ordering, and tone, adjusted to meet Arabic language standards. The analysis also focused on cultural adaptations, including visual, thematic, and messaging changes to ensure suitability to Arabic-speaking audiences. Finally, the analysis identified the difficulties encountered in translation involving misunderstandings and cultural disparities.

4 Data Analysis and Discussion

The researcher selected six different advertisements to address cultural translation problems and the strategies used in their localization for Arabic-speaking audiences. The analysis and discussion focused on linguistic, visual, and cultural elements, underscoring the critical role of adaptation in achieving successful cross-cultural communication in advertising.

4.1 Advertisement 1A (See *Appendix*)

4.1.1 Descriptive Overview of the Advertisement. This advertisement urges women to buy bras from Victoria's Secret, featuring various women who say phrases such as, "What does my bra say about me? You're sensitive, powerful, sexy, chic, confident," and "Every woman needs one perfect bra." The video features photo sessions of

women wearing lingerie, often posing suggestively. Both linguistically and visually, the ad conveys a strong sexual connotation, with the narration emphasizing traits such as sexiness and confidence. The intonation of the words also contributes to meaning; for example, the word “confident” is spoken in a self-assured tone.

4.1.2 Analysis. This ad works well in Western societies, where sexually suggestive content is generally accepted. However, translating such sexual connotations into Arabic would be culturally inappropriate, as Arab societies tend to be more conservative. Arab ad copywriters typically avoid sexual content to prevent offending viewers. A literal translation of phrases like, “What does my bra say about me? You’re sensitive, powerful, sexy, chic, confident” would not be suitable in Arabic. Instead, the translation might be rendered as “ash’or belaraha b’d erteda’oha” (I feel comfortable after wearing it), stripping away the sexual undertone. The original adjectives are replaced with “comfortable,” neutralizing the ad for Arab audiences. Similarly, the noun “bra” would likely be implied rather than explicitly stated, as discussing such items publicly is generally considered inappropriate in mixed-gender settings. To further suit the cultural context, the video would likely also depict women in modest clothing, with the bra shown separately rather than worn.

4.2 Advertisement 2A (See *Appendix*)

4.2.1 Descriptive Overview of the Advertisement. This advertisement promotes a new Sandwich by McDonald’s, featuring a narrator who says, “A bacon and egg McMuffin” and “A combo of champions.” The video starts with a bun being assembled with various ingredients, intending to entice viewers by emphasizing the sandwich’s deliciousness and high quality. The phrase “a combo of champions” implies that those who eat this sandwich are winners.

4.2.2 Analysis. Whereas the ad may be considered appealing to Western audiences, the situation would be quite different in Muslim communities. The inclusion of bacon in the ad poses a significant issue, as pork products are forbidden (haram) according to the Quran. Therefore, this type of advertisement would not be aired in the Middle East, where the majority of the population is Muslim. Translating the ad into Arabic would require crucial changes, including substituting bacon with halal meat, such as beef or chicken, and swapping the visual illustration of bacon with another type of meat which is permissible in the Muslim community. A suggested Arabic translation could be, “sandwich mcmafin bebiedh w aldjaj” (A chicken and egg McMuffin), removing the offensive content and making the ad and the food culturally appropriate.

4.3 Advertisement 3A (See *Appendix*)

4.3.1 Descriptive Overview of the Advertisement. This Calvin Klein ad expresses support for the LGBTQ+ community by telling the story of a gay man and his supportive sister. The siblings recount moments from their childhood, including when the man came out as gay to his father. The sister affirms her love and loyalty to her brother, saying, "I will defend this man till the day I die," and "he is my blood, but he also is very much chosen." Both siblings are shown wearing similar feminine tops, underscoring the brand's message of inclusivity and solidarity with the LGBTQ+ community.

4.3.2 Analysis. In Western societies, such an advertisement aligns with the growing acceptance of LGBTQ+ individuals. Brands like Calvin Klein use these ads to reach a wider audience by showing their support for marginalized communities. However, this type of ad would not be well-received in the Arab world, where homosexuality is not only stigmatized but also illegal in many countries. Arab societies tend to be highly conservative, and the LGBTQ+ community is often viewed as morally deviant. Consequently, an ad that openly supports LGBTQ+ rights would likely be met with backlash, including protests and potential legal consequences.

Translating this ad for an Arab audience would require significant alterations. The themes related to LGBTQ+ pride and acceptance would need to be removed entirely to avoid cultural and religious clashes. Lines like "I am gonna tell her that you're gay" and "I was like OKAY" would be omitted. The focus would instead shift to promoting the clothing item as a high-quality product for women. Sentences like, "He is my blood, but he also is very much chosen," could be altered to refer to the product itself, such as emphasizing its reliability and comfort. Similarly, the visual content would need to feature only women expressing satisfaction with the clothing, rather than showing a man wearing a traditionally female top. By making these changes, the ad could be adapted to appeal to an Arab audience without violating cultural norms.

In sum, the Calvin Klein ad's LGBTQ+ messaging would be incompatible with the values of Arab societies. Translators would need to focus solely on the product's attributes and eliminate any reference to homosexuality to ensure the acceptance of the ad. This domestication strategy, which is similar to localization, is essential when adapting advertisements for culturally distinct audiences.

4.4 Advertisement 4A (See *Appendix*)

4.4.1 Descriptive Overview of the Advertisement. This advertisement urges men to buy the new Lynx Excite deodorant from Axe, a brand of male grooming products marketed toward a younger male demographic. The ad includes a group of women embodied as angels and one man. The video features women falling from the sky,

attracting the attention of the public. Eventually, the women gather around one man, and the video concludes with the line: “New Lynx Excite. Even angels will fall.”

4.4.2 Analysis. The advertisement appeals to Western audiences by featuring beautiful women attracted to a man who uses the product. It carries physical connotations, which are generally culturally acceptable in Western society. However, in the Arab world, this ad would be unacceptable for two main reasons. First, it objectifies women, portraying them as mindless beings drawn to a man solely because of his deodorant, which would be considered offensive. In Arab culture, women are generally viewed as intelligent, respected, and virtuous. Second, the ad’s portrayal of women as angels contradicts Islamic and Christian teachings. In Islam, angels are pure, non-human creatures created by God, and depicting them as women who are seduced by men undermines their sanctity. Additionally, based on the Quran, angels are not regarded as female in Islam. Such imagery would distort the Islamic understanding of angels, making the ad unacceptable in a Muslim-majority society. On the other hand, in Christianity, the Bible refers to angels as the ‘messengers’ of God and are always referred to in masculine form. The term ‘fallen angels’ in Christianity tradition refers to angels who are expelled from heaven and tempt humans into sin.

In translating the line “Even angels will fall,” the word “angels” can be replaced, as suggested by the researcher, with “beauty,” removing the religious connotation and making the ad culturally appropriate. Adding phrase “in love” clarifies the meaning, aligning with preferences of Arabic-speaking audiences for explicit communication. The paralinguistic elements of the video, such as the depiction of women, should also be altered, perhaps focusing solely on men using the product.

4.5 Advertisement 5A (See *Appendix*)

4.5.1 Descriptive Overview of the Advertisement. This advertisement urges men to buy ‘Axe Hair Office Love,’ a hair styling product. The video is set in an open-plan office with romantic music in the background. The video features two protagonists: a male and a female. The male is represented as a walking disembodied head of hair who falls in love with a female co-worker, who is represented as a headless woman with prominent breasts.

Both protagonists exchange glances throughout the day, only appearing as complete human figures when they meet by chance at a bus stop. The ad ends with the line: “Hair. It’s what girls see first.”

4.5.2 Analysis. The ad employs a sensualized portrayal of both the male and female protagonists. The man is depicted as being attracted to the woman’s breasts, while

the woman is drawn to the man's hair, reducing their identities to these body parts. While such sexual objectification may be acceptable in Western advertising, it is inappropriate in an Arab context. In Arabic-speaking societies, women are typically not objectified in this way, and a man pursuing a woman outside of traditional norms would be considered a social taboo. Both men and women in such a scenario would face social consequences.

To make the ad suitable for an Arabic audience, the phrase "Hair. It's what girls see first" could be replaced with "For a healthier and shiny hair," which removes the sexual connotation and shifts the focus to hair care. The translation avoids any reference to physical attraction and instead promotes a more neutral message. Additionally, the video should be modified to remove sexualized imagery and concentrate on the product itself, without objectifying women.

4.6 Advertisement 6A (See *Appendix*)

4.6.1 Descriptive Overview of the Advertisement. This advertisement urges viewers to choose between their friends and a free Whooper sandwich called "Whooper Sacrifice" from Burger King. It invites users to delete ten Facebook friends in exchange for a free Whopper sandwich. The video narrates how Burger King tested the love of Americans for the Whopper by creating a Facebook app that prompted users to "sacrifice" their friends in return for a coupon. The ad plays on the idea of a moral dilemma: "What do you love more, your friends or the Whopper?" Over 200,000 friends were deleted before Facebook shut down the app.

4.6.2 Analysis. The concept of deleting friends for a free meal was a success in the U.S., where the app (i.e., Whopper Sacrifice) was installed by around 60,000 Facebook users' and led to the deletion of over 200,000 friends. However, in the Arab world, this would be perceived as unethical. Deleting friends, even digitally, for material gain would be seen as a betrayal of social principles. In Arab culture, friendships are highly valued, and severing friendships for selfish reasons would be considered disgraceful. Strong societal ties and the influence of Islamic teachings emphasize the importance of maintaining good relationships and discourage abandoning friends for trivial reasons.

To adapt this advertisement for an Arabic audience, the concept of sacrificing friends would need to be removed entirely. Instead, the promotion could involve a game or challenge, such as collecting receipts or solving puzzles, to win a free Whopper. This approach would better align with Arab values, focusing on fun and competition rather than undermining personal relationships. The translation would also omit any references to moral dilemmas and focus on the excitement of winning a reward through effort and skill.

By altering the message and removing the ethical challenge, the ad can still promote the product without offending the values of the Arab world, where social and religious principles hold significant weight. Eventually, the Whopper Sacrifice campaign was shut down by Facebook, as it violated user privacy and challenged the very concept of the platform.

5 Discussion of Findings

The study focused on the role of localization in advertising translation for marketing. It analysed six advertisements, 1A, 2A, 3A, 4A, 5A, and 6A (See Appendix), and examined the differences in linguistic and non-linguistic elements between the source language and the target language, highlighting the need for adaptation and cultural sensitivities in translation.

One of the common requirement for localizing advertisements to be acceptable for Arabic-speaking audiences is the removal of sexualized content altogether. In Ad 1A, ('Victoria's Secret Bras'), the translation would to remove sexual implications and replace direct references to the product with more neutral language that would be acceptable for conservative Arab values and norms. In a similar manner, Ads 4A and 5A, which featured gender objectification and overt flirtation, would need to be significantly modified to remove the above themes and redefine the product's appeal in a culturally acceptable manner.

The localization process also had had to account for significant religious sensitivities. Ad 2A, promoting a McDonald's sandwich with bacon, would need to replace bacon with chicken as bacon is made from pork, which is forbidden in Islam. Another religious sensitivity arises in Ad 4A, portraying angels as women, an image which contradicts Islamic teachings. Hence, a complete modification of the theme of the ad would be necessary, eliminating any religious connotations and adopting a gender-neutral approach.

Furthermore, the representation of themes that are considered socially or morally unsuitable in Arab societies posed another challenge. For example, Ad 3A, which promotes the LGBTQ+ community, is culturally incompatible with the conservative values prevalent in the Arab world. To avoid backlash, the recommended localization strategy would be to edit down the ad into something that appeals exclusively to women's fashion. Likewise, Ad 6A's premise, that friendship should be sacrificed for a free Whopper, is inconsistent with Arab culture, which values loyalty and social relationships. Through the suggested adaptations, a culturally appropriate game-based reward system could be used instead of the original controversial concept.

Overall, the primary localization strategies across all six ads involved neutralizing sexual and provocative content, replacing religiously unacceptable elements, and adjusting messages that could be perceived as socially unsuitable. The research

findings highlight the need for cultural adaptability and sensitivity when localizing ads to different audiences. By considering the cultural background, values, and sensibilities of their target audience, advertisers can ensure that their messages resonate effectively without being offensive or violating social norms. Localization plays a vital role in bridging cultural differences and promoting successful communication in the world of marketing and advertising.

6 Conclusion

This paper aimed to investigate the role of localization in English advertisement translation into Arabic, focusing particularly on how linguistic and cultural adaptation strategies are used to boost audience engagement. The study intended to identify the difficulties encountered in transferring persuasive and culture-bound aspects of one language cultural structure into another. The analyses carried out in the study in the form of a qualitative two-level review of some chosen advertisements demonstrated that successful Arabic translations are mostly predetermined by the ability of the translator to balance linguistic and cultural appropriateness, ensuring that the message will be perceived naturally by the target audience.

The results of the study highlight the important role of localization in the translation of advertising for marketing. Localization involves adapting the linguistic and non-linguistic elements of advertising to fit the cultural and social norms of the target audience. The study emphasizes the need for adaptation and cultural sensitivity in translation to ensure effective communication and avoid cultural conflicts.

Moreover, when localizing ads for Arabic-speaking audiences, the study identified several problematic areas in cultural translation. These include religious taboos, gender roles, and varying social norms. Religious dietary restrictions, such as the prohibition of pork in Islam, create problems in the translation of advertisements for such products. Gender roles and the objectification of women are sensitive topics, and advertisements that reinforce stereotypes or depict women in a sexualized manner are considered inappropriate in Arabic-speaking countries.

Therefore, to ensure effective intercultural communication through advertising, the study offers strategies to overcome translation problems. These strategies include changing the linguistic content, adapting visual elements, and adapting to cultural norms. This may involve replacing culturally sensitive or offensive terms with more appropriate alternatives, removing sexual connotations, and avoiding the objectification of women. Visual adaptations can include adjusting imagery to reflect different styles of clothing or adherence to different cultural norms. In conclusion, the study emphasizes the importance of understanding the cultural sensitivities and preferences of target audiences when creating advertisements that positively resonate with them.

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Appendix

Advertisement 1A: Victoria Secret lingerie from youtube (Bra's, That's Our Thing | Victoria's Secret https://www.youtube.com/watch?v=ZW_HKycX74s) (2023)

Script:
This bra makes me feel...
What does my bra say about me? You're sensitive, powerful, sexy, chic, confident.
If my bra could talk.... it would say... you're ready for anything.
We know you. we know comfort. we know fit. we know what's new, now, and next
Stay tuned, we're only getting better.
Bras, that's our thing
Every woman needs one perfect bra.

Advertisement 2A: McDonald's Bacon and Egg McMuffin from youtube (https://www.youtube.com/watch?v=clPi9glw66A) (2022)

Script:
A bacon and egg McMuffin
A combo of champions
Together & lovin' it

Advertisement 3A: Calvin Klein Pride 2022 (https://www.youtube.com/watch?v=xGVxsthJOUU) (2022)

Script:
We went through a lot together
She's always been very protective
I remember my dad saying, "I am gonna call call your sister. I am gonna tell her that you're gay."
And I was like "OKAY"
I was just like "And? It's my brother? And it doesn't matter"
I will defend this man till like the day I die.
I always felt like I've known that my brother is gay and that he didn't have the confidence, and fair enough.
It was Texas. He was a black man
Because I'm so protective of my brother, I'm not gonna ever answer to anyone about how I feel and who I love
And so that to me was like the utmost loyalty
Yeah. It was it's – I knew that was my best friend.
He is my blood, but he also is very much chosen
I feel like I chose him from the universe,
And I was like, "I gotta go to earth. You should come with me."
I am here with yah girl
Mhm

Advertisement 4A: Lynx Excite TV Advert – (https://www.youtube.com/watch?v=QgMZ2uCkwaI) (2009)

Script:
New LYNX Excite
Even Angels will fall

Advertisement 5A: Axe 'Office Love' Styling Gel (https://www.youtube.com/watch?v=n0gTgg4yvck) (2022)

Script:
Hair. It's what girls see first

Advertisement 6A: Burger King's "Whopper Sacrifice" Campaign (https://www.youtube.com/watch?v=WMCf0zc1ZBI) (2009)

Script:
Burger king knew that America loved the whopper, but wanted to prove it
So it turned to Facebook and put the love to the test
Everybody loves adding friends but is that simply because it's fun to see your friends list pile up?
Well what if there's a way to dump friends and get rewarded for it
And what if this turned into a race to dump them before they dumped you
Meet whopper sacrifice
Delete ten friends and receive a free whopper
A true moral dilemma
A telling choice
What do you love more
Your friends or the whooper
A difficult question to answer
Or was it?
Almost instantly people were sacrificing their friends for whoppers like crazy
To the tune of two hundred thousand friends sacrificed in just over a week
And people's burning desire to dump friends for the Facebook
Instead of embracing this new marketing opportunity
And the 35 million free media impressions it received
Facebook began limiting its functionality
Ultimately, forcing Burger King to take it down
Whopper Sacrifice had been sacrificed
But despite the application's short-lived activation
Burger King proved what it knew to be true
That Americans love the whopper

11

Cultural Background and Self-regulation: An Exploratory Comparative Analysis of Ecuadorian and Hungarian Higher Education EFL Students

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Abstract

The role of cultural background in shaping self-regulated learning (SRL), is a crucial yet understudied aspect of education. While recognizing its importance, existing research provides limited information on the influence cultural background on students' SRL. This paper aims to add to the literature by investigating how some aspects of cultural background influence the SRL of learners of English as a foreign language (EFL) from under-researched contexts such as Ecuador and Hungary. To achieve this, the qualitative research paradigm was employed, utilizing semi-structured interview guides to gather rich, detailed insights into participants' experiences and perceptions. The Templates of Organizing Style (TOS) and the constant comparative method was utilized as frameworks for data analysis, for a systematic organization and interpretation of interview data. The study involved EFL learners enrolled in a teaching training program at higher education institutions in Ecuador and Hungary. The objectives were threefold: 1) to explore how teacher trainees from Ecuador and Hungary perceive their self-regulated learning, 2) to examine teacher trainees from Ecuador and Hungary's viewpoints regarding their respective cultures' influence on their self-regulated learning, and 3) to identify the cross-cultural differences between Ecuadorian and Hungarian teacher trainees' self-regulated learning. The results suggest that students from Ecuador and Hungary have different ways to self-regulate their learning. It also suggests that these differences are influenced by participants' perceptions of their cultural background, particularly regarding their relations with self and others, planning, and time management. For instance, Hungarian participants tend to lean towards independence and planning in their SRL strategies, while Ecuadorian counterparts exhibit stronger collectivity and challenges with time management. This can have important implications in education, such as in designing inclusive learning environments and developing lessons and curriculum, where educators can better support the SRL journey of their students.

Keywords: self-regulated learning, cultural background, cultural dimensions, cross-cultural study, higher education

1 Introduction

Self-regulated learning (SRL) is a dynamic and multifaceted process, encompassing cognitive, metacognitive, motivational, behavioral, and environmental dimensions (Dörnyei, 2005). According to Schunk and Zimmerman (1997), SRL is the formation of one's own "thoughts, feelings, and actions that are planned and cyclically adapted to the attainment of personal goals" (p. 14). It refers to a student's independent effort in changing their emotions, mindset, and demeanors in order to meet a learning goal, consequently taking charge of their learning.

Organismic theories of motivation, such as self-determination theory (Ryan & Deci, 2000) or cognitive evaluation theory (Gagné & Deci, 2005) propose that learning is intricately linked to people's participation in their community. This interaction facilitates the transmission of knowledge across generations within communities (Gutiérrez & Rogoff, 2003). In this sense, SRL can be understood as a social phenomenon, wherein personal goals are intertwined with social goals and shaped through interactions with others. This view highlights the influence of shared values, beliefs, and practices on individual behaviors, emphasizing the relationship between cultural background and personal agency (Jackson et al., 2000). This has been confirmed by several studies conducted across a variety of contexts and participants (Gutiérrez & Rogoff, 2003; Jaramillo et al., 2017; Järvenoja et al., 2015; McInerney, 2011; Purdie & Hattie, 1996; Trommsdorff, 2009).

The present paper proposes that cultural values, beliefs, and practices in students' backgrounds shape their approach to SRL, resulting in diverse SRL strategies and behaviors. While existing cross-cultural studies mostly focus on contrasting the use of SRL strategies between learners of different countries (Ho, 2003; Purdie & Hattie, 1996; Shi et al., 2013), they often overlook the contextual aspects that influence students' use of SRL strategies (McInerney, 2013). Moreover, many of these studies focus primarily on comparisons between Asian and European or North American educational contexts, employing quantitative research instruments developed largely within European and North American traditions, potentially overlooking cultural nuances in the self-regulation process (Jackson et al., 2000; McInerney, 2013).

Examining different contexts and using qualitative methods can contribute to the literature by gaining unique perspectives and understanding. This study seeks to shed light on the influence of cultural background on students' SRL by exploring cross-cultural differences between students from under-researched contexts such as Hungary and Ecuador, contributing to a deeper understanding of SRL within diverse cultural settings.

The objectives were threefold: 1) to explore how teacher trainees from Ecuador and Hungary perceive their self-regulated learning, 2) to examine teacher trainees from Ecuador and Hungary's viewpoints regarding their respective cultures' influence on their self-regulated learning, and 3) to identify the cross-cultural differences between Hungarian and Ecuadorian teacher trainees' self-regulated learning.

2 Literature review

The following section will first delineate SRL concepts and their intersection with cultural aspects for the context of this research. Subsequently, it will examine existing cross-cultural research on SRL, identifying the gaps as grounds for this research. Finally, it will offer an overview of SRL models and culture as a construct within the framework of this study.

2.1 Self-regulated Learning and Cross-cultural Research

The introduction of this paper mentions how SRL entails adjusting thoughts, emotions, and actions to meet personal goals through continuous planning and adaptation (Schunk & Zimmerman, 1997). In this research, SRL is seen as behaviors that students habitually perform to learn a language. Such behaviors might be accompanied by the use of SRL strategies such as goal self-testing, time management, awareness (Crede & Kuncel, 2008), setting, strategy selection, making plans, note-taking, individual or group activities, self-evaluation, etc. (Crede & Kuncel, 2008; Zimmerman & Pons, 1986).

Cross-cultural research on SRL has made significant developments in understanding how cultural factors influence learning processes. However, there are several areas where the field can improve to enhance the validity and generalizability of its findings. According to McInerney (2008), there's a tendency in research to overlook or inadequately conceptualize culture in cross-cultural research. This tendency can be observed in several influential studies (Ho, 2003; Purdie & Hattie, 1996; Shi et al., 2013). Although these studies recognize the importance of culture in relation to SRL, the ways in which culture is defined vary considerably. For example, Ho (2003) highlights the relevance of culture in the self-regulation process without providing an explicit definition of the construct. Similarly, Shi et al. (2013) primarily conceptualize culture through the individualism–collectivism distinction, offering a relatively narrow operationalization. In contrast, Purdie and Hattie (1996) adopt a broader perspective by incorporating cultural values, beliefs, and social norms, suggesting the need for more nuanced and context-sensitive approaches to examining culture in SRL research.

Another challenge in cross-cultural SRL research lies in the selection and adaptation of research instruments. Many studies rely on self-reporting instruments that may not adequately capture cultural variations in SRL processes. For instance, in Purdie and Hattie (1996), out of the 24 different SRL strategies described by Zimmerman and Pons (1986), the authors failed to present a significant relationship between the participants' use of strategies and their cultural background apart from memorization. In the same way, Ho's (2003) research compared how frequently students from one culture use SRL strategies in comparison to other cultures with little emphasis on cultural influence.

There might be several reasons why researchers mostly used quantitative methods. At the time, Self-Regulation (SR) research was still mainly focused on what strategies students used rather than the process that drove students to use such strategies. Furthermore, research was based on a self-reporting Likert scale surveys which have often been criticized for conflicting or erroneous results (Tseng et al., 2006). In addition, according to McInerney (2011) self-reported questionnaires do not have the same efficacy when used in diverse cultural contexts.

Most of the cross-cultural research in SRL is based on differentiating Asian cultures from Australian or Canadian cultures (Ho, 2003; Purdie & Hattie, 1996). While these comparisons offer valuable insights, they overlook the diversity of cultural experiences within and across regions. Future research should broaden its scope to include a wider range of cultural comparisons, including non-Western cultures, to capture different views of cultural influences on SRL. Moving forward, cross-cultural SRL research should prioritize the development of more robust conceptual frameworks, qualitative methodological approaches, and varied cultural points of view to advance our understanding of how cultural aspects shape self-regulated learning processes.

2.2 Self-regulation Models and Culture

In his model of Self-Regulation (SR), Zimmerman (2000) depicted the SR process as a cycle centered on continuous monitoring: 1) Students engage in self-reflection to evaluate their learning techniques, 2) based on this reflection, they set goals and decide on strategies, influenced by their background and contextual factors, 3) next, they implement and monitor these strategies, 4) finally, they assess the outcomes and make necessary adjustments. Chen and Stevenson (1995) proposed a model of cultural differences based on the distinctions in nationality and ethnicity in students' academic success. They concluded that three cultural elements play an important role in students' academic achievement: the value placed on education (the importance of perceived good education within the culture); belief in ability versus effort (the attribution to effort or ability on success); and social support (in educational contexts from people surrounding the learner). According to the authors, these cultural elements significantly influence students' motivation and learning behaviors, underscoring the importance of considering cultural context in understanding learning.

However, Orellana and Bowman (2003) criticized how some authors treated culture as a static element and suggested viewing it as a dynamic and multifaceted process, highlighting the need to add qualitative methods of research to capture the nuanced effect of culture on learning processes. The authors also concluded that a culturally responsive SRL framework was needed to examine the nuances of dynamic constructs like cultural background and SRL. Anyichie and Butler (2017) created a model of SRL as situated in context which studies self-regulation as situated in different sociocultural situations (e.g. classroom instruction or activities). First, it centers on the

role of the individual's interaction with the context and how this interaction influences students' learning, i.e., the power of sociocultural backgrounds on students' learning. Secondly, it highlights the effect of the broader and specific learning context (history and culture, as well as institute, teacher, and classroom activities) in influencing students' learning as well as their emotions and motivation.

In light of these models and critiques, this research adopted a culturally responsive approach by developing the interview guide based on the Model of SRL as situated in context (Anyichie & Butler, 2017), the cultural differences model (Chen & Stevenson, 1995), and cyclical model (Zimmerman, 2000). By considering the multifaceted nature of culture and its dynamic interplay with self-regulation processes, the interview guide aimed to capture the complex relationship between cultural background and students' self-regulated learning practices.

2.3 Culture

Culture encourages unity from members of a community because of the values and beliefs they share (Lederach, 1995); however, individual behavior varies from person to person, and not every member of a community acts and thinks the same way (Holló, 2014) which complicates researchers' attempts to measure culture. To avoid problems regarding the conceptualization of culture in cross-cultural research described above, in this research culture is viewed through the lens of cultural dimensions, which are not definitions of culture but insights into specific facets of culture (Holló, 2014). One commonly used model is found in Hofstede (2011), which includes six cultural dimensions: power distance, uncertainty avoidance, individualism/collectivism, masculinity/femininity, long-term/short-term orientation, and indulgence/restraint. These dimensions are not used to describe individual cultures per se, but they are meant to be used in comparison to other countries. For instance, one can only measure a country's individualism when compared to the collectivism of another country. Further classifications within these dimensions offer nuanced insights into societal dynamics, such as reactions to injustice (small vs. large power distance), gender roles and emotional expression (masculinity vs. femininity), temporal orientation (long-term vs. short-term), emotional management (uncertainty avoidance), and responses to desires (indulgence vs. restraint) (Hofstede, 2011).

In her overview of the research of cultural dimensions, Holló (2014) classified cultural dimensions into thematic categories. This resulted in four categories of cultural dimensions: 1) dimensions related to oneself and others, 2) related to general dispositions and situations, 3) related to time, and 4) related to communication. In the context of this research, culture is defined by using parts of earlier definitions of culture as a set of values, beliefs, and patterns of behavior that are shared and learned between people of the same community (Banks & Banks, 2010; Damen, 1987; Hofstede, 1984; Kroeber & Kluckhohn, 1952; Lederach, 1995; Spencer-Oatey, 2006; Useem, 1971).

Building upon this understanding, a thematic classification of cultural dimensions served as the foundation for interviews conducted in this study since "qualitative and interpretative methodology describing cultural dimensions verbally in a reflective manner can be used more accurately both by the general public and researchers" (Holló, 2014, p. 135).

3 Methods

In order to get insights into participants' views and opinions, it was important to ensure the acquisition of substantive data, which called for the qualitative research paradigm. It is ideal to gain abundant information that could assist in the identification of emerging themes. Another advantage of using the qualitative research paradigm is that it allows the researcher to explore unknown areas (Dörnyei, 2007). Based on the literature review and the aims of the study, the following research questions were formulated:

1. How do Ecuadorian and Hungarian EFL teacher trainees describe their ways of self-regulation?
2. What characterizes Ecuadorian and Hungarian EFL teacher trainees' cultural backgrounds?
3. What aspects of their cultural background do Ecuadorian and Hungarian EFL teacher trainees believe shape their self-regulation learning?
4. What comparison can be made between Ecuadorian and Hungarian EFL teacher trainees' descriptions of the way their cultural background influences their self-regulated learning?

3.1 Participants

This research focused on exploring the perspectives of teacher trainees in higher education institutions. Convenience sampling was employed, aligning with the exploratory nature of the study (Dörnyei, 2007). The participants were selected from two cultural contexts: Budapest, (Hungary), and Ibarra (Ecuador). In Budapest, six participants were recruited, all of them females. Similarly, in Ibarra, the group comprised six participants: four females and two males. It is important to note that each participant was born and raised in their respective countries, contributing to the richness of cultural perspectives explored in the study. The age of the participants ranged between 22 and 30 years.

The choice of teacher trainees as participants was deliberate. These are English pre-service teachers who, besides learning teaching methodology, are also taught in English as the language of instruction. To become language teachers, teaching trainees need a high level of language proficiency. In comparison to students from other programs where learning English is imposed and not chosen, it can be inferred that EFL teaching

trainees have a higher motivation to learn the language; thus, their experiences in taking charge of their own learning offer valuable insights into the research topic.

To maintain confidentiality, each participant was assigned a pseudonym. *Table 1* provides a detailed profile of the participants, including relevant demographic information.

Table 1

Participant Profiles

Pseudonym	Age	Place of studies	Nationality	Gender
Ally	25	Budapest	Hungarian	Female
Bella	23	Budapest	Hungarian	Female
Dana	23	Budapest	Hungarian	Female
Isa	27	Budapest	Hungarian	Female
Lana	23	Budapest	Hungarian	Female
Tamara	24	Budapest	Hungarian	Female
Maya	22	Ibarra	Ecuadorian	Female
Ruth	23	Ibarra	Ecuadorian	Female
Dan	23	Ibarra	Ecuadorian	Male
Juan	22	Ibarra	Ecuadorian	Male
Jazmín	23	Ibarra	Ecuadorian	Female
Patricia	24	Ibarra	Ecuadorian	Female

3.2 Data collection

Due to the exploratory nature of this research, a semi-structured interview guide was chosen as the instrument to explore participants' views. This type of research tool allows for structured, yet spontaneous data collection (Wallace, 1997). The interview guide was developed by the author based on a thorough literature review to inform the questions and ensure alignment with the research objectives.

The interview guide consisted of four main categories, each designed to address specific aspects of the participants' experiences and perspectives: introduction, self-regulated learning, cultural background, and cultural influence in self-regulation. The first category contained biographical questions regarding participants' age, nationality, and language background. The second category consisted of questions regarding participants' way of taking charge of their own learning in line with the cyclical model of self-regulation (Zimmerman, 2000). The third category was concerned with exploring participants' views on their own cultural context, drawing upon theories and definitions

of culture (Banks & Banks, 2010; Damen, 1987; Hofstede, 1984; Kroeber & Kluckhohn, 1952; Lederach, 1995; Spencer-Oatey, 2006; Useem, 1971) and thematic classification of cultural dimensions (Holló, 2014). The final category was aimed at exploring participants' views on how their cultural context influences their way of taking responsibility for their learning. To develop the items of this category, the model of self-regulation as situated in context was employed. The situated context in question was doing homework as it offers a practical and relatable setting for exploring participants' taking charge of their learning. It provides a structured activity that is universally relevant, allowing for meaningful cross-cultural comparisons and insights into participants' self-regulatory behaviors within a familiar educational setting.

3.3 Validation of the instrument

The validation of the interview guide was carried out by consultations and revisions of three experts in the field. Two of the experts have vast experience researching individual differences and the third expert has a large repertoire of research in cultural studies. Their feedback was gathered through a combination of one-on-one online meetings and email correspondence. After multiple revisions, the instrument was tested in three different pilot interviews. The pilots called for some adjustments and modifications in the interview guide regarding the flow of the interview, the wording of the questions, and the deletion or addition of questions.

3.4 Procedures

Each of the interviews lasted an average of 70 minutes approximately, and altogether they yielded around 50,000 words of data. The data were treated anonymously and participation in the research was voluntary, with all participants consenting to participation in an electronic form. The interviews were conducted through MS Teams, which allowed for computer-based recording, which was then transcribed into Word files using MS Word Office online transcriptions. It is worth mentioning that the interviews of the Hungarian group were conducted in English and the interviews of the Ecuadorian group were conducted in Spanish. Consequently, the quotes selected for presenting the results of the Ecuadorian group were translated into English by the author and checked by a co-coder.

3.5 Data analysis

The data analysis was conducted with the assistance of two co-coders including a native Hungarian colleague and a Spanish native colleague. This ensured diverse perspectives throughout the analysis. The data analysis combined deductive and inductive methods. First, Crabtree and Miller's (1999) Template of Organizing Style (TOS) provided a structured visualization of the data and themes, based on prior ideas from literature or personal experience (Miles & Huberman, 1994). Subsequently, the constant comparative

method (Glaser & Strauss, 1967) was employed to uncover new themes and patterns emerging from the data itself. This combination of methods allowed a comprehensive and systematic analysis that is both informed by existing knowledge and open to new discoveries. As a final step, each group had a final code manual (*Tables* 2 and 3) which was compared to identify differences and similarities between the Hungarian and Ecuadorian's participants' views.

Table 2

The Hungarian Group's Final TOS

Self-regulation (RQ1)	Culture background (RQ2)	Culture influence in self-regulation (RQ3)
Decision making and strategic planning	Diverse	Value in punctuality
Research and preparation	Jealousy	Value in planning
Active Engagement	Complaining	Social status (value in learning)
Behavioral strategies	Kind but closed (lack of acceptance of foreigners)	Family pressure
Goal oriented	Traditionalist/ conservative	Passive tendencies
Prioritization and adaptation	Hide emotions (sensitive topics are not discussed in public)	Attitudes toward homework and the educational system
Intrinsic motivation	Unique language	

Table 3

The Ecuadorian Group's Final TOS

Self-regulation (RQ1)	Culture dimensions (RQ2)	Culture influence in self-regulation (RQ3)
Active engagement	Diverse	Procrastination
Behavioral strategies	Multifaceted	Relaxed view of time
Feedback based on tests and task results.	Positivity	Attitude towards homework
Intrinsic motivation	Resilience	Socio-economic disadvantages
Procrastination tendencies	Conformity / "herd mentality"	Collective work
spontaneous and reactive learning	Value in community	
Collective learning	Mutual support and helping others	
Prioritizing by deadlines	Open and adaptable to change	
	Relaxed view of time "Ecuadorian time"	

4 Results

The following section will describe the findings of the data analysis following the logic of the research questions. Due to the cross-cultural nature of this research, the results will be divided in two parts. The first part will deal with the outcomes of the data analysis of the Hungarian group. The second part will deal with the results of the data analysis of the Ecuadorian group.

4.1 Hungarian group

Regarding self-regulated learning, Hungarian participants described proactive learning as characterized by deliberate decision-making and strategic planning. They highlighted the importance of goal setting, preparation, and targeted efforts to address perceived knowledge gaps. They further underlined attentiveness during classes, note-taking, and proactively seeking opportunities to practice the language.

Participants emphasized the significance of research and preparation in understanding the assignment requirements and selecting topics of personal interest. As Isa said, “First, I always check what kind of writing I can expect or what kind of reading task and things like that and try to prepare according to that… I collect all the information that I had to know”.

Furthermore, participants expressed a willingness to adapt and refine their approach based on self-reflection and the context of their learning. For instance, they discussed their prioritization of assignments, considering factors such as time constraints, task difficulty, and personal motivation. Lana and Isa highlighted practical considerations in task prioritization, with Lana stating, “I look at the assignment, […] and how much time it will take for me to do that.” Meanwhile, Ally shed light on how her prioritization is influenced by her instrumental motivation and attitudes toward subjects and teachers, stating, “After a while you stop caring much about a certain subject… then you just subconsciously bond to them (teacher) a bit more and then that makes you work a bit harder.” According to the results, participants seem to be strategic planners. They try to improve their learning by being aware of their flaws and making conscious decisions about their behavior to reach their learning goal.

Regarding their cultural background perceptions, participants highlighted the diversity within Hungarian culture, emphasizing distinct regional and communal identities such as countryside, Swabian communities, or Russian-descendant communities. Additionally, they described common cultural traits, including complaining, jealousy, indifference, a unique language, and a strong attachment to tradition.

Most of participants described a cultural tendency towards complaining, with Tamara stating, “complaining is very Hungarian, and we have this expression, a cheer

when we get drunk, which means like we are crying even when we are celebrating." Similarly, Bella highlighted jealousy as a prominent feature, noting, "for some reason, jealousy came to my mind. I have the feeling that some Hungarians are very jealous, but we also like football."

Tradition emerged as a significant aspect of Hungarian culture, with Lana remarking, "Hungarian people are mostly conservative... take into consideration the traditions a little more than other cultures." Moreover, participants expressed a reluctance to be open to foreigners. Bella stated, "We can't accept other cultures. I don't think so that we are good at this because the only intercultural city is our capital, Budapest. We don't have that international mentality. So, when it comes to acceptance, we are not that good at that."

In the final set of questions, participants described the impact of their cultural background on their SRL. They emphasized the importance of planning and effective time management in Budapest's fast-paced environment. Tamara highlighted the significance of punctuality, noting, "there are those who live in the capital, and they juggle jobs and school and whatever... planning time I think it is a lot more important in our everyday lives." Furthermore, some participants perceived punctuality as a demonstration of caring for others. Ally expressed this sentiment, stating, "it's really a way of showing that you care about the other person to be punctual. You care about them as a person that they have time."

Moreover, some participants reflected on their culture's attitudes toward homework, expressing a desire for more meaningful and challenging assignments. Lana emphasized the importance of homework, stating, "I just think that it should be limited... and it should have a purpose." Most participants expressed some negative attitudes towards the Hungarian education system, particularly regarding institutions. Ally noted, "Hungarian education teaches you to be passive... even if people don't like something, they're not going to be very vocal about it."

Participants also discussed the influence of their socioeconomic backgrounds and family upbringing on their learning behaviors. Ally mentioned the comfort of steady financial support, while Isa viewed her lower socioeconomic status as a source of motivation, stating, "my mom took charge of everything, and she did everything by herself... if she could do that then we can do everything as well." Additionally, family dynamics played a significant role in shaping attitudes towards learning. Dana shared her experience of minimal parental pressure, contrasting it with Ally's negative experience of familial pressure for good academic performance.

In conclusion, participants' perceptions of their cultural background, such as value in punctuality, attitudes toward homework, family pressure, and socioeconomic status, greatly influence their self-regulated learning behaviors.

4.2 Ecuadorian group

The Ecuadorian participants described an active engagement in taking charge of their own learning, emphasizing monitoring, collaboration, motivation, and a relaxed view of time. Their engagement with the target language varied, including activities like watching movies, translating, using devices in the target language, and seeking real-life language applications. Participants mentioned ways of tracking progress, such as the ability to understand native speakers and comparing their skills with peers.

Collective learning played a crucial role in the Ecuadorian participants' self-regulation. They described themselves as proactive in seeking help from peers when encountering difficulties. All participants described their collective approach to learning, like Patricia who stated, "I always compare it to a friend of mine… there we find out if we did well or badly and I make changes." Intrinsic motivation was a driving force behind participants' learning. Most of them expressed a genuine interest in language improvement for personal growth rather than merely earning high grades. One participant explained, "I am motivated to learn because I want to improve myself and my prospects."

However, procrastination emerged as a significant challenge for many participants. They admitted to being heavy procrastinators and struggled with time management. One participant described their planning process as abstract, stating, "I don't have strict planning, but I prioritize and calculate how long it would take me to do it, approximately." Participants attributed their procrastination to the perceived lack of challenge in assignments. As one participant remarked, "the tasks that have been sent to us are not so difficult… and we still have time to do it… they give us many days to do it and even then, we leave it to the last minute."

In conclusion, the Ecuadorian participants' self-regulated learning behaviors are characterized by active engagement, intrinsic motivation, procrastination challenges, and a reliance on collective learning for support and feedback.

Regarding their perceived cultural background, participants depicted their culture as multicultural and diverse, expressing a deep appreciation for their cultural heritage. Jana described this by "since I was little, I have always had that love and respect for the different ethnicities… my mother is black and my father is mestizo… that always makes me see the positive and negative of both cultures." Additionally, participants described their culture as friendly and sociable, placing a high value on community and helping others. However, they also regret the herd mentality within their culture. Paula succinctly summarized this concern, stating, "the Ecuadorian is known for being a sheep… he tends to follow the ideologies of others, regardless of if they are good or bad." Furthermore, all participants highlighted the concept of "Ecuadorian time" as a shared aspect of their culture. Maya described this concept as being two or three hours late, stating, "they know us or call us unpunctual… when they say about a meeting at seven, it will be seven in Ecuadorian time… then they all know the time to arrive is at nine or ten."

In summary, Ecuadorian participants portrayed their culture as diverse and multicultural, emphasizing a deep appreciation for cultural diversity alongside a sociable nature. However, they also expressed concerns about their lack of individual thinking and punctuality issues, which they attributed to a perceived collectivist tendency and a relaxed attitude towards time.

Ecuadorian participants described their approach to taking charge of their learning as being influenced by shared perceptions of time, attitudes toward homework, collectivist tendencies, and socio-economic disadvantages. Regarding time management, participants expressed a relaxed view, with Juan noting, "there is no such strict planning and sometimes, homework is not submitted." Ruth echoed this sentiment, describing the collective behavior in their learning environment, stating, "around my society... they leave everything for last... there are like two or three people who present their homework on time and the rest all present last." However, socio-economic background also played a significant role in participants' learning experiences. Jazmín stated, "my family does not have the resources to pay for the internet now... If I do not have that type of economy to be able to pay for that, then I cannot study." Half of the participants described the challenges of their social economic status affecting their ability to complete assignments, illustrating the impact of socio-economic disadvantages on learning opportunities.

In summary, participants' approaches to taking charge of their learning are shaped by a combination of relaxed attitudes towards time, collective behavior, and socio-economic challenges. These factors influence their ability to engage effectively in their learning process.

5 Discussion

Both the Hungarian and Ecuadorian groups' perceptions of SRL are influenced by cognitive, metacognitive, and behavioral strategies, aligning with previous literature on self-regulation (Hadi et al., 2014; Zimmerman, 1989; Zimmerman & Pons, 1986). Overall, participants from both cultures emphasized goal setting, monitoring, reflection, and adaptation in their learning processes, which are elements of Zimmerman's cyclical model of SRL. Hungarian participants exhibit a proactive approach, emphasizing strategic planning and goal setting, while Ecuadorian participants engage in forethought activities, actively monitoring their progress and expressing intrinsic motivation for learning.

Participants from both the Hungarian and Ecuadorian groups described engaging in cognitive, metacognitive, and behavioral strategies associated with self-regulated learning, aligning with established models of SRL (Hadi et al., 2014; Zimmerman, 1989; Zimmerman & Pons, 1986). Overall, participants emphasized goal setting, monitoring, reflection, and adaptation as central components of their learning processes, consistent

with Zimmerman's cyclical model of self-regulation. While these shared elements suggest common foundations of SRL, participants' accounts also revealed differences in how self-regulation is enacted and understood within their respective cultural and educational contexts.

In this study, participants' perceptions were examined through selected cultural dimensions to compare both contexts' influence on SRL. From this perspective, Hungarian participants more frequently emphasized autonomy, personal responsibility, and strategic planning in their approaches to SRL, which may be interpreted as aligning with more individualistic orientations. Ecuadorian participants, by contrast, often highlighted collective learning practices, peer support, and shared responsibility, which they themselves associated with collectivist tendencies (Jackson et al., 2000; Shi et al., 2013). Importantly, these orientations were not mutually exclusive, as participants from both groups described drawing on individual and collective strategies depending on task demands and learning contexts.

Differences also emerged in participants' descriptions of structure and uncertainty in learning. Hungarian participants often stressed the importance of planning, predictability, and control, suggesting a tendency toward reducing uncertainty (Hofstede, 1994, as cited in Holló, 2014). Ecuadorian participants, in contrast, described greater openness to spontaneity and flexibility, particularly in managing assignments and deadlines. Rather than viewing these tendencies in evaluative terms, they can be understood as culturally and institutionally situated responses to learning environments that differ in expectations, resources, and constraints.

Participants' accounts of time management reflected differing orientations toward time. Hungarian participants frequently associated effective self-regulation with punctuality and structured scheduling, whereas Ecuadorian participants described a more flexible approach to time, emphasizing adaptability and responsiveness to changing circumstances. These differences illustrate how culturally shaped time norms may influence learners' self-regulatory behaviors, particularly in relation to planning, prioritization, and deadline management.

Perceptions of authority and autonomy further shaped participants' approaches to SRL. Hungarian participants more often emphasized independent decision-making and critical engagement with learning tasks, while some Ecuadorian participants described greater deference to instructional authority. However, these perceptions were closely intertwined with participants' prior educational experiences and socio-economic conditions, suggesting that power relations in learning contexts cannot be attributed solely to cultural background.

From a pedagogical perspective, these findings highlight the importance of culturally responsive approaches to fostering self-regulated learning in higher education. Educators working with culturally diverse learners may benefit from explicitly teaching self-regulatory strategies while remaining sensitive to students' culturally shaped

expectations regarding autonomy, collaboration, time management, and authority. For example, combining structured planning tools with opportunities for collaborative learning can accommodate both individualistic and collectivist learning preferences. Similarly, transparent expectations, scaffolded autonomy, and flexibility in task design may help students from varied cultural and socio-economic backgrounds develop effective and sustainable self-regulation practices.

Overall, the findings suggest that self-regulated learning is not only an individual cognitive process but also a socially and culturally situated practice. While cultural dimensions offer useful analytical tools for interpreting participants' perceptions, it is essential to acknowledge diversity within cultural groups and avoid deterministic interpretations. Learners navigate multiple influences simultaneously, and their self-regulatory behaviors emerge from the dynamic interaction between individual agency, cultural norms, and educational contexts (Jackson et al., 2000).

6 Conclusion

This study added to the literature by exploring the cultural background influence in self-regulated learning SRL between the two groups, with Hungarian participants emphasizing individualism, planning, and punctuality, while Ecuadorian participants describing stronger collectivist influences and challenges with time management influencing their approach to taking charge of their learning.

In light of the results of this study, recommendations for various aspects of higher education can be drawn. It is advised that educators undergo cultural awareness training and encourage open dialogue in classrooms. Teaching methods should be adapted to accommodate diverse learning styles and opportunities for cultural exchange. Employing a variety of teaching methods and providing personalized guidance can help address diverse learning styles and foster active engagement in the learning process. For instance, educators can leverage students' perceived collectivist backgrounds to incorporate more group work activities into the curriculum.

At the same time, the study is based on participants' self-reported perceptions and does not claim to represent definitive or homogeneous characteristics of Hungarian or Ecuadorian cultures. Several limitations should therefore be acknowledged. The exploratory nature of the study, the use of convenience sampling, and the relatively small sample size limit the generalizability of the findings. In addition, the study relied on a single data source. Future research could strengthen and extend these findings by incorporating larger and more diverse samples, employing multiple data sources through vertical and horizontal triangulation, and using complementary methodological approaches. Further studies might also explore additional cultural dimensions or institutional factors to capture the dynamic and multifaceted nature of cultural influences on self-regulated learning.

In conclusion, by recognizing and accommodating the diverse cultural backgrounds influencing self-regulated learning, educators can pave the way for more inclusive educational experiences, fostering not only academic success but also cultural understanding and appreciation among students.

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12

From Best to Average: A Motivational and Self-image Crisis in (once) Exceptional Foreign Language Learners

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Abstract

This article examined the relationship between motivation loss of formerly high achieving L2 learners and fragile self-image. The claims were based on the phenomenon that Mendaglio (2012) called *hitting the wall* (HTW), under which he means a self-image crisis of gifted learners when they reach a transitional stage of their education and meet higher demands. The study intended to prove, on the one hand, that their fragile self-image emerges from a faultily interpreted idea of exceptionalism, and on the other hand, that this fragility is a decisive factor in bringing forth HTW. For this, a comparison was made between the results of HTW research to research on gifted L2 learners and on motivation in L2 learning, which found that certain correlates of being an exceptional learner do indeed cause self-image issues that enhance the likelihood of HTW-like experiences and can act as demotivators for otherwise high-achieving learners. Another important finding was that these misinterpretations of exceptionalism are likely to foster perfectionist traits and procrastination in learners; additionally, these learners often fall short of general learning skills, which altogether further heighten the chance of a crisis. However, since there is a complete lack of empirical research on HTW in L2 learning, further empirical studies are needed to expand and substantiate the theoretical findings.

Keywords:

language learning motivation, gifted/high-achieving learners, learner self-image, *hitting the wall*

1 Introduction

Exceptional learning achievements are generally perceived as predictors of a bright career in that field, which is usually imagined as a constant, gradual improvement, until one reaches the maximums of one's own capability. This process is often assumed to be automatic in a sense that individuals who achieve outstandingly will be able to maintain their progression and seek for opportunities of improvement without external pushes. It is frequently supposed that such self-reliant learners, who take care about the steadiness of their own progression themselves, are also always sufficiently motivated. (Blackburn & Erickson, 1986; Peterson, 2006).

However, this idea is becoming disputed. An increasing number of studies tell stories of exceptional learners being unable to maintain their exceptional achievement, beginning to underachieve compared to the performance expected from them, furthermore showing signals of losing interest, demotivation, and even some sort of internal crisis (Almukhambetova & Hernández-Torrano, 2020a; Almukhambetova & Hernández-Torrano, 2020b; Barbier et al., 2019; Blackburn & Erickson, 1986; Fong & Krause, 2014; Mendaglio, 2012; Peterson, 2006; Whitney & Hirsch, 2007). Crisis symptoms are most likely to surface in case of raised expectations towards the learner, or a change in the learner's surroundings. These are typical when transitioning to the next stage of education: from primary to secondary school, from secondary school to university (Almukhambetova & Hernández-Torrano 2020a, Almukhambetova & Hernández-Torrano 2020b, Barbier et al., 2019; Fong & Krause, 2014; Mendaglio, 2012), but in case of language learners, it can also occur when moving to a country where the learner's L2 is the native language (Dörnyei & Mentzelopoulos, 2022).

Mendaglio (2012) calls this crisis *hitting the wall* (HTW) and claims that first, it happens when a learner who had formerly little to no difficulties with learning faces challenges for the first time, second, that it not only manifests in academic underachievement, but in a psychological crisis, more precisely, in a disruption in self-efficacy beliefs. Most learners who experience HTW lose confidence, start questioning their abilities and competence, which eventually can result in a distaste towards the associated fields of learning, a gradual process of disengagement, avoidance, and consequently, underperformance (Barbier et al., 2019; Fong & Krause, 2014), or even leaving the field completely (Zólyomi, 2022).

I argue that what stands behind this phenomenon is the incorporation of an unreasonable idea of academic exceptionalism in the learners' identity. These learners have an internal standard that does not allow them to fail, regardless how minor the failure is, because they believe true exceptional learners never do that (Mendaglio, 2012). In this article, I am examining the phenomenon of HTW, the (once) exceptional learner's motivational crisis among second language (L2) learners. I aim to map the concepts of being an exceptional learner, both regarding what it means in research and what common connotations the term has for students, parents, and teachers. I am than

describing the image these exceptional learners internalized about themselves, and how it contributed to maladaptive patterns in their learning behaviour. I am also highlighting the specifics of L2 learning in the topic with, for instance, including learners in the study who did not learn in a formal school setting but also had HTW-like experiences, and linking the general findings to theories of L2 learning. Lastly, I aim to find solutions for preventing such a crisis.

2 Academic Conceptions of Giftedness and Exceptionalism

Research discusses high-achieving learners under the term gifted, and this is also how they are often referred to by parents, teachers, and other agents in their personal life. There is, however, no universally accepted academic definition of giftedness. There seems to be a consensus on giftedness being an innate quality, for example, Gagné (2000) defines giftedness as "the possession and use of untrained and spontaneously expressed superior natural abilities (called aptitudes or gifts), in at least one ability domain, to a degree that places an individual at least among the top 10% of his or her age peers" (p. 2). Renzulli (2005) shares a similar idea when referring to giftedness as "well above average ability", meaning that a gifted person is able to perform or "possesses the potential for performance that is representative of the top 15 to 20 percent of any given area of human endeavour". In the context of L2 learning, Biedron and Pawlak's (2016) definition of a gifted individual is "a person who, owing to his/her exceptional inborn gift for learning languages, especially capacious verbal working memory, as well as expertise in second language (L2) learning, is able to learn any foreign language to a near-native level of competence, given proper motivation, time and conducive environment" (p. 117). It is notable that despite the agreement on giftedness being a born-with quality, these three definitions identify different groups of learners as gifted. Gagné and Renzulli measures giftedness in one's position compared to one's ranking in a population of learners, although Renzulli also mentions that such a strict definition of giftedness as his may not be simple to apply to certain types of abilities. Biedron and Pawlak provide a different direction, they consider giftedness dependent on one being able to reach a standard of achievement, like L2 competence approaching a native speaker's. They also acknowledge the environmental, motivational and time factors playing a role in successful learning. Similarly, the Nazarbayev Intellectual School (NIS) Annual Report (2011) measures giftedness to a standard of qualities. They define a gifted learner as "an individual with high intellectual capacity able to think critically and creatively, strong in spirit, able to apply his/her knowledge for the benefit of social progress" (p. 14), which criteria may come across as rather vague for standards.

Giftedness is difficult to measure accurately. Terms like "high intellectual abilities" or "above average competences" can be subjective if we do not put them into exact measurement systems. The existing tests on different kinds of intelligence or aptitude are, however, increasingly being questioned whether they truly measure

what they claim to (Biedron & Pawlak, 2016; Li, 2019; Shuttleworth-Edwards, 2016; Wen et al., 2016). In case of L2 learners, reaching nativelikeness may sound like an exactly defined end goal, but this concept also has its critics, either because of the complications of defining nativelikeness (Freunberger et al., 2021) or because some would argue that it is at least questionable whether a fully nativelike L2 competence is reachable (Abrahamsson & Hyltenstam, 2009). Moreover, Renzulli (2005) suggests that first, not all kinds of giftedness are measurable, second, it is not enough to rely on clearly measurable achievements when examining a person's giftedness, as giftedness also includes one's potential to achieve a certain level - but how can a person's potential be examined?

Regarding second language learning (SLL), it often depends on the context what is understood under high achievement (Biedron & Pawlak, 2016; Dörnyei & Mentzelopoulos, 2022; Tankó & Andréka, 2022). Biedron and Pawlak (2016) mention how a distinct end-goal is difficult to point out (which Dörnyei and Mentzelopous's (2022) L2 learner interviewees agree with); however, they add that mostly reaching nativelikeness is considered such. They claim that those who can achieve (near) nativelike L2 competences in one or multiple foreign languages, are conventionally considered linguistically gifted, especially if they started learning the foreign language after passing the presumed critical period, usually meaning passing puberty. Dörnyei and Mentzelopoulos (2022) addressed current debates about the reliability of nativelikeness as a concept, still, they chose to measure high L2 competences through one's nativelikeness: they only selected learners who could pass as a native speaker. They justified this decision by emphasizing that they do not believe this is the only way to measure L2 excellence, but as a nativelike performance is hard to achieve, it is a trivial indicator of high abilities. Tankó and Andréka (2022) bring in another common measurement of high L2 achievements: standardized exams. Their study discussed the faultiness of the Hungarian advanced level English school-leaving exam, which supposedly warrants one's B2 level of English; moreover, it serves as an entrance exam for the English Studies BA courses at Hungarian universities. However, the exam was found to measure different competences than those required for participating in this major's English language courses, meaning secondary schools and universities may conceptualize high L2 achievements differently, potentially leading to learners' confusion about their abilities.

Although I am examining high-achieving or once high-achieving L2 learners, and several of them may even qualify for the gifted label under one of the above presented definitions, there may be some who would not pass the requirements. The reason why I decided to refer to these learners as exceptional rather than gifted, is that I wanted to shift the focus away from the level of achievement these people have reached and concentrate more on the shared life experiences and psychological journey they had. I am including learners based on how likely it is that exceptionalism became a part of their identity and how have they experienced some distinction from others based on

their high level of competence. Therefore, there may be significant differences in the performance and abilities of the learners examined in this article, and it may be argued that some of them are only exceptional in their own microenvironments, and as such, may have a false sense of high-achieverness or giftedness, and arguably a relatively false sense of exceptionality.

3 The Internalized Image: Widespread Beliefs and Misconceptions about Being an Exceptional Learner

Most research that discusses HTW mentions how the way learners and their parents and teachers approach their high achievements influences their behaviour. The most important perception is that a series of high achievements signals giftedness, so these learners are identified as gifted, and as high achiever and exceptional learners. This status is assumed to be consistent through the lifetime of the learner, as being such a good achiever is thought to have at least partly cognitive origins (Mendaglio, 2012). In Gagné's model (2000), talent, which he uses to describe the mastery of a certain competence and which in this case is visible through the high achievement, derives from a combination of the learner's cognitive abilities and learning, meaning the work the learner puts into mastering the competence. He, therefore, argues that regardless how developed abilities a person has, success cannot be reached without training. Mendaglio (2012) transfers this concept into the following equation: "intelligence + effort = achievement" (p. 6). However, he argues, a significant number of exceptional learners along with their environment believe that a true exceptional learner should produce high achievements without preparation and a need for learning, or learning a lot is a sign of lack of high abilities or intellect. Examples in the context of L2 learning would be composing a flawless L2 text on an advanced level without studying the sufficient grammar or vocabulary properly, having nativelike pronunciation naturally, without practice, or remembering all items of vocabulary by a single reading. Mendaglio's (2012) use of the word intelligence is not coincidental: according to him, incorporating exceptionalism into one's identity comes with incorporating intelligence into one's identity; therefore, the learner's belief is that being an exceptional learner is possible because of their intelligence. He continues that such learners also tend to believe that the achievement itself is what defines a person's abilities, meaning if someone has a low mark that means that person is not fit for that type of academic work - also meaning, they are not smart enough. This misconception can easily make learners who internalize the status of an excellent learner reluctant to spend more time studying, on the one hand, because as such a learner, they feel like they are not supposed to. On the other hand, there is a loss of confidence and fear when it comes to that challenging subject, and there may be an underlying assumption that if they have to study to reach high achievements, their intelligence was not as high as they believed - so if they are too "dumb" for the task, why bother anyway?

In the context of second language learning (SLL), the above-described phenomenon correlates to the concepts of fixed and growth mindsets (Lou & Noels, 2019). Believing that a person's linguistic abilities are unchangeable, one either has a gift for languages or not which determines the possible learning outcomes is called a fixed mindset, while believing that high-achievements in language learning are a result of strategized work and substantial learning is known as a growth mindset (Lou & Noels, 2019). The anxiety of the learners going through HTW are rooted in their fixed mindsets: they believe that their exceptional achievements were a result of their fixed qualities, such as intelligence, or language aptitude; and them stopping producing exceptional achievements means they have reached the boundaries of their abilities, and they are not intellectually suitable for learning how to achieve more. A necessary step for getting out of the crisis is developing a growth mindset, which would enable them to conceptualize themselves as capable learners again, as they would not view their obstacles as boundaries anymore, but as challenges to overcome, and opportunities to learn.

Barbier et al. (2019) examined students with HTW experiences who, at the time of the study, had recently transitioned to secondary school and were all 12 years old. They observed that the stigmatization of learning, and conceptualizing being a smart student as being someone who does not have to study for good grades is intensely present in this age group. One participant complained about being mocked by peers for studying a lot, another one remarked that classes that teach studying techniques are "for slightly lesser smart, or average students" (p. 8). The latter suggests, not only studying, but having to learn how to study, or asking for academic support is something a smart learner can never do. However childish these ideas sound, unfortunately they do not disappear entirely until the learners arrive at university: not only Mendaglio (2012) supports this idea, but Almukhambetova and Hernández-Torrano (2020a, 2020b) also report instances of exceptional students having trouble with asking for help and being afraid to be labelled as dumb if they do not understand something. They claim, "a part of the identity of a gifted student is a certain assumption that gifted students can do everything better than other students and with less effort" (Almukhambetova & Hernández-Torrano, 2020a, p. 85.). Almukhambetova and Hernández-Torrano's (2020b) research examined students who came from specialized schools for the gifted, and they were afraid to raise questions to both their professors and peers, since they believed that it meant "showing weakness" (p. 9).

A sign of how deeply the concept of exceptionalism is present in these learners' identity becomes clear in a group setting – namely, they tend to compare themselves to others. This habit usually gives them anxiety and makes them second guess their own abilities (Almukhambetova & Hernández-Torrano, 2020a; Almukhambetova & Hernández-Torrano, 2020b; Mendaglio, 2012). The problem when such learners arrive into a more challenging environment, where more high-achieving students are present or they encounter students with higher knowledge than ever before, is not only that they

feel less smart than before; another problem is that they do not feel they are one of the smartest people in the classroom anymore (Almukhambetova & Hernández-Torrano, 2020a; Almukhambetova & Hernández-Torrano, 2020b; Mendaglio, 2012). To quote a student interviewee: "In my old school [regular school] I was smart, in my new school [gifted education] I am average" (Mendaglio, 2012, p. 9.). This is clear evidence that not mere smartness but exceptionalism, a sense of superiority, is what these students identify with, even if not necessarily consciously. Such an aspect of the identity crisis is unsurprisingly less possible for students who already took part in gifted programs and were used to being surrounded by similarly bright students (Mendaglio, 2012). Whitney and Hirsch (2007) relied on this fact when arguing for the benefits of separated gifted classes, claiming a student experiencing being by far smarter than their peers only builds arrogance, and creates a false and fragile self-image.

4. The Consequences of Not Knowing How to Learn

4.1 A Lack of Self-regulated Learning Strategies

A critical component of exceptional learners' learning crisis is that they failed to master self-regulation strategies. Kormos and Csizér (2014) defined self- regulation as "a process in which people organize and manage their learning, and this includes learners' control over their thoughts (e.g., their competency beliefs), emotions (e.g., anxiety experienced while learning), behaviors (e.g., how they handle a learning task), and the learning environment" (p. 279). They argued that in the context of L2 learning, classroom education often cannot provide a satisfactory environment for reaching proficiency; therefore, autonomous learning is necessary, for which mastering self-regulation is essential. Unfortunately, Barbier et al. (2019) claim that learners' problems with self-regulation may already be apparent in secondary school. In their study, they found that a major difference between the high-achievers and underachievers of the same group was that high-achievers usually started homework with the less enjoyable tasks to get through them fast, while underachievers started with the ones they enjoyed the most and procrastinated doing the ones they were not motivated to do as much as it was possible. This shows that underachievers in Barbier et al.'s study (2019) struggled with self-monitoring, a key aspect of self-regulation that includes one's ability to organize tasks: they were not capable to motivate themselves for tasks that they did not feel like doing, so they fell behind with those. This may have various reasons; for example, low value-judgement of the postponed tasks is evident in some cases: one of the underachievers simply called these tasks "stupid" (p. 7). The same student also complained about not knowing how to study; however, he implied that he needed to learn it. He explained, he used to have no problem with achieving high in school without doing any additional work at home, but as the requirements were raised and he needed study strategies for the first time, he discovered his lack of them.

Almukhambetova and Hernández-Torrano (2020a, 2020b) also reported insufficient studying strategies among exceptional students, but at university. They partly held the local gifted education system responsible: during secondary school years, students received a great deal of personal supervision by the institution: they were constantly monitored, regularly consulted personally with teachers about their current achievements, and tasks were always prescribed. This individual care disappeared in university education, which students were not prepared for: secondary school education did not cover the teaching of learning independently – probably because of assuming that gifted students do not need guidance for that. The most common problems for the interviewed students, just like in Mendaglio (2012), were time management issues, which were worsened by the non-school-related aspects of university life: apart from needing to organize their studying autonomously for the first time, students also needed to organize the tasks of living alone for the first time and the social adaptation to the university community – all these causing them trouble with scheduling learning.

4.2 Perfectionism and Procrastination

According to Kormos and Csizér (2014), those without sufficient self-regulation strategies, especially time management, are likely to procrastinate – which was indeed observed on the learners without such strategies in Almukhambetova and Hernández-Torrano (2020a, 2020b) and Mendaglio (2012). Kormos and Csizér (2014) added that there may be multiple causes of procrastination: it is not only a matter of effort and motivation, but of the learner's attention control and "contextual restrains" (p. 292). Regarding the latter, former mentioned university students are starting from an unfortunate position due to their multitude of tasks, which paired with the lack of time management skills, identifies them as likely procrastinators.

Another reason, however, that may stand behind the procrastination of exceptional learners, who go through HTW, is perfectionism. Brophy (1999) links the two directly together by calling procrastination a common trait of perfectionist learners "because [perfectionist learners believe] the work must be perfect from the beginning and continue to be perfect as one goes along" (p. 1). There is no doubt that learners, who were identified as exceptional are frequently perfectionists: Blackburn and Erickson (1986) claim, they "define success and being 'best' as synonymous and therefore perceive any performance less than perfect or first place as a failure" (p. 553). They also stress that for such an individual, avoiding any situation that would truly test one's abilities, such as completing a challenging task is more appealing than a risk of encountering failure. They fear seeing themselves failing, since it would not allow to see themselves as perfect achievers anymore, which, in their understanding, is required for being an exceptional learner. With the encountered difficulty, they know they do not qualify for the label anymore, so they rather stay passive in order not to produce any evidence that would further destroy their identity. This theory is supported by Burke

and Yuen (2007), who argue, procrastination is "a problem with one's relationship with oneself, reflecting a shaky sense of self-esteem" (A Note To Our Readers section, para. 5). They state, people "use procrastination to avoid uncomfortable feelings" (Burke & Yuen, 2007, Know Thyself section, para. 2). They trace procrastination back to the fear of the individual's unacceptable qualities that the person does not dare to face to preserve their (pretended) positive attitude to their self-image.

However, this is a self-handicapping behaviour. Avoiding assignments because the person only wants to create perfect work is pointless, as generating anything that comes close to perfect commands a scrutinized detection and correction of all possible flaws of their work – but if the person fears to produce flawed work that commonly leaves them with no work done. If there is work produced, because of procrastination, it is made in a limited amount of time, which naturally makes it more difficult to work precisely: the hastiness of the manner of work produces more imperfect assignments. Perfectionist learners realize their own worst fears as they stand in their own way with maladaptive behaviour, which might even serve false evidence of their believed incompetence. Furthermore, procrastination itself causes stress in learners (Burke & Yuen, 2007): so, if the primary reason of procrastination was not feeling threatened by the task but genuine time management issues, fear of the task can develop later due to feelings of guilt and shame associated with the task that has not been completed for a long time. It can be assumed that the level of fear will only grow with the duration of procrastination extending, as anxiety because of not completing the task adds to the already existing anxiety originating from the task itself. They are most likely to finally arrive at a middle of a spiral of frustration, self-blaming, and continuing nonproductivity (Burke & Yuen, 2007).

Summing up, the lack of self-regulative learning strategies can create a base level of anxiety towards assignments, which originates from the once exceptional learners' doubts about their own abilities. Their reaction to this is procrastination that only builds up more stress towards learning, which damages the constructed identity of the easy learner. Their avoidant learning process is likely to result in underachievement, which justifies their beliefs of them losing or never having their gift for the subject that causes further aversion towards it.

5 The Specifics of L2 Learners' HTW

The most important aspect that differentiates the conceptualisation of L2 learning from learning other subjects is the widespread idea of language aptitude as a born-with gift that determines the individual's possibility for success in L2 learning. Doughty (2018) mentions that in the literature there are two possible ways to define aptitude: it can either be understood as a cognitive ability that enables successful language learning or it can be seen as a collection of components including a cognitive linguistic ability, but also "motivation, personality facets, prior learning experience, and current learning

context" (p. 2). While the common public perception of aptitude usually echoes the first definition, current research findings suggest that it is rather the second idea that could provide an accurate image on what is necessary for high-achievements in L2 learning. According to Csizér and Albert (2021), aptitude used to be viewed as a stable individual trait in former research, but nowadays, the possibility of learner's circumstances contributing to aptitude is frequently discussed, and it is not unimaginable that the two approaches can coexist.

Similarly, Dörnyei and Mentzelopoulos (2022) drew a mixed conclusion about cognitive aptitude: they did not deny its existence or significance, relying on the connections between aptitude test results and L2 learning outcomes in the last fifty years' research, but they pointed out that the accurate interpretation of these results causes debates in literature. An argument for the importance of other factors in L2 learning, however, was that Dörnyei and Mentzelopoulos found differing aptitude levels in a group of all nativelike L2 speakers. Moreover, those who learned more than one foreign language sometimes seemed to have varying levels of aptitude for different languages (although these were established via self-report interviews, as they did not conduct any test of aptitude). The authors also found that a belief of language aptitude exists among exceptional language learners: a source of motivation for some of those who eventually mastered their L2 on a nativelike level was that they felt they may have a gift for languages, and L2 learning is easy for them. One participant even mentioned that it was this belief that helped her when challenges occurred: she considered them "minor things" (p. 68), knowing that she naturally takes all obstacles easily, as someone with a high aptitude. Interestingly, in this learner's case the idea of exceptionalism was what prevented her from experiencing HTW. This suggests that a belief in one's above-average abilities alone is not a predicator of underachievement if it does not pair with perfectionism. This learner described learning as effortless, but also mentioned overcoming challenges, which she considered a natural part of learning, unlike the previously discussed perfectionists, who were stopped by every chance of mistakes. Her conceptualisation of exceptionalism did not require constantly flawless performance without which the exceptional label is unwarranted, which provided her with a more stable and flexible self-image, and sufficient self-efficacy beliefs that all resulted in her staying motivated.

In the light of findings about exceptional learners' cognitive aptitude beliefs, it is worth examining whether a person may go through HTW while maintaining the belief of a linguistic gift. It is possible that they start questioning another ability of theirs, for example, the ability to study in general, and that could be the subject of HTW experiencers' insecurity. Some exceptional L2 learners might believe that despite having a high aptitude, they are not suited to conform to the demands of formal, school-based education. An example of someone going through HTW claiming not being able to learn has been found already (Barbier et al., 2019), and the findings about exceptional learners' common lack of studying skills can also point in this direction. A participant's experience

in Dörnyei and Mentzelopoulos's (2022) research may also support this theory: they explain that they had participated in a highly proficient English language course to pass a language exam, but they did not finish it because of realizing, this, as they describe, this "super academic" (p. 137) level of English was too difficult for them. We do not know if not being able to complete the course caused them any anxiety or doubts in their abilities: they claimed, they realized not being interested in this professional level of English and preferred further exploring the language of everyday communication – so, for them, it may be just a matter of interest question, instead of an established belief of academic incompetence. Dörnyei and Mentzelopoulos claimed that this participant managed to stay motivated in their L2 and eventually could pass as a native speaker, so their learning process can be called successful. However, this example hints at the potential emergence of a HTW experience when moving from informal L2 learning to a more organized or demanding setting, such as switching from casually picking up a language from a hobby to classroom education. While the learner mentioned took the failure with ease, it is likely that some other learners would not necessarily do so, especially if a particular achievement, such as getting a certificate from the course, was important for them. If a person views succeeding in the new form of learning as an indispensable step forward in acquiring L2 competence, the lack of it probably feels like a greater setback. Moreover, changing the frames of L2 learning can bring in new motivations for the learners: an individual who formerly only learned a language for the pleasure of it, to connect with the culture or to access some hobby, may now learn it also to get good grades, access further learning or work opportunities, or even to get the praise or attention of the language teacher. From that point, whether the fulfilment of these goals happens can have an impact on the learner's motivation. Additionally, a school environment has the potential to even encourage a learner to underachieve compared to one's potential: according to Dörnyei and Mentzelopoulos (2022), multiple participants in their research recalled memories of being bullied in a language class for nativelike pronunciation, such students were called a "snob" or "pretentious" (p. 101). It is not unimaginable that if learners learn to tone down their abilities to blend in better, they might experience difficulties to adjust to higher requirements and put their full capacity into learning and performing in case of an environmental change, where the community norms differ.

Since all the examples of HTW mentioned until this point took place in formal education, it is important to ask if HTW is exclusive for this setting? And if so, is it the school-education system that fuels HTW? The urgency of this question lies in that venues for L2 learning are not restricted to schools or language schools; therefore, if the school-exclusivity of HTW would be proven then, on the one hand, the picture would be clearer about the possibility of HTW in the case of L2 learners, on the other hand, it would indicate that reforming the education system would probably result in the disappearance of this phenomenon. It is most likely, however, that HTW is not a specifically school-related issue: Dörnyei and Mentzelopoulos (2022) present the story of a learner who experienced a severe self-efficacy crisis when she moved to a country

where her L2 was the native language. She stated that she went through a phase of having impostor syndrome, where she found her achievements undeserved and her linguistic talent unreal. She recalled that her confidence dropped so much that she could not make herself talk to people in her L2 until having a few drinks. This instance suggests that HTW can happen under any circumstance in which the learners feels that a higher level of performance is needed. The participant's anxiety probably came from perfectionism, believing that in an environment of all native speakers she should also aim for that level of performance. She eventually found peace with her L2 competences in a multicultural environment, which enabled her to accept her own non-native speaker identity. She has also accepted her learning not being free from difficulties: "I think that my confidence comes out of the fact that I have accepted that certain things will stay hard for me. You know, I am a slower reader, and that's fine. And I'll be more open about the difficulties, and that helps me actually not to put incredibly exacting standards on myself. In a sense, it frees me to speak with less tension, and it makes me a better speaker in turn" (p. 144). She named her confidence as the most crucial element of her success in high-level L2 performance, the significance of which Dörnyei and Mentzelopoulos (2022) agreed with.

A key motif in the stories of exceptional language learners that Dörnyei and Mentzelopoulos (2022) collected is that advanced L2 competence can only be achieved with sufficient persistence. In their case, this seemed to be strongly attached to high enough self-efficacy beliefs: learners' persistence originated from them believing in their capability to achieve their goals; therefore, they remained motivated for L2 learning. This is a key area where HTW experiencers need to improve in, otherwise failure is most likely guaranteed: Zólyomi (2022) cited the example of language teachers and teacher trainees who, she argued, were more likely to leave the profession if they had low self-efficacy beliefs. A component of high self-efficacy, which HTW experiencers are unlikely to have, is a satisfactory amount of mastery experiences - these are what Bandura (2012) called the experiences of success and failure for a learner. HTW experiencers, however, tend to avoid situations where these could be gained, which means, they are destined to have at best stagnant abilities.

L2 learners have shed light on a method how avoidant tendencies could be broken, namely by putting themselves into situations where avoidant behaviour is impossible. In the context of L2 learning, this is most likely an international environment where the learner's only option for communication is using the L2. There are two examples for this in Dörnyei and Mentzelopoulos (2022): in both cases, this first triggered a crisis in the participants, but as they had no choice but to adapt, it eventually resulted in them building up a less fragile self-image that made it possible for them not to collapse at every mistake they made. The first learner's experience I already described in the previous section. The second learner was similarly in an L2 environment when her attitude to her own performance changed. She recalls, she "was quite sensitive to bad experiences with the language and being disapproved of" (p. 138), but because of the

need to constantly perform in her L2, she eventually became "thick-skinned" (p. 138), and accepted her occasional failures as natural, along with the necessity of moving on and keep working. At last, she became comfortable with her own L2 performance. These two success stories prove the worthiness of the exploration of HTW among L2 learners, as it most likely would lead to a deeper understanding of both learners' crises and the process of L2 learning.

6 Possibilities of Preventing and Overcoming HTW

The occurrence of HTW seems not to be dependent on a particular country's educational system, as it has been observed in multiple countries, such as Canada (Mendaglio, 2021), Kazakhstan (Almukhambetova & Hernández-Torrano, 2020a, 2020b), Belgium (Barbier et al., 2019) and in the United Stated (Fong & Krause, 2014), and even a non-school-related instance has been recorded (Dörnyei & Mentzeolopous, 2022). However, it is more than likely that schools also contribute to the phenomenon, as exceptional learners are notoriously abandoned by educational systems, assuming they do not need external support (Peterson, 2006), and they often arrive at a stage of transition without the necessary autonomous learning skills (Almukhambetova & Hernández-Torrano, 2020b), which leads to their inability to cope with the new requirements. The most important institutional task, therefore, is raising awareness about the issue of HTW among both educators and learners so they could be prepared to such cases, especially students, who should be made aware of the possibility of underachievement occurring after years of permanent high achievement and ease of learning. Raising awareness is also of key significance to break the existing stigma of learning how to learn and asking for support among exceptional learners (Barbier et al., 2019; Almukhambetova & Hernández-Torrano, 2020a), since only adding self-regulative learning strategies to the curriculum has proven insufficient without this step (Barbier et al., 2019). Encouraging self-reflexive behaviour may also be helpful, as the problem of HTW is rooted in an inaccurate self-image, and fostering close attention to one's learning habits would improve that. Lew and Schmidt (2011) reported about the efficiency of incorporating such strategies into classroom work.

Along with these institutional measures, individual work can be necessary to prevent or get over HTW, as mastering self-reflexive behaviour, establishing confidence and a stable self-image, as well as a welcoming attitude to failure are individual psychological processes that cannot happen without the individual personally taking steps for conscious self-improvement. Peer support can be crucial in this process: Almukhambetova and Hernández-Torrano (2020a, 2020b) found that, for some students, a community of fellow-students with similar attitudes and life-experiences was what helped them out of HTW. Probably the most important step is recognizing avoidant behaviour, such as procrastination, and ending it: the example from Dörnyei and Mentzelopoulos's (2022) suggests that creating a situation where avoidance is

impossible, such as seeking out an exclusively L2 speaking community in the case of L2 learners, is effective. For L2 learners, reconnecting with the original motivator for L2 learning, like the respective culture or hobby can be helpful as well, numerous learners reported that remembering why they are interested in the language in the first place helped them feeling ready to pursue L2 learning (Dörnyei & Mentzelopoulos, 2022).

7 Conclusion

The aim of this article was to explore HTW among L2 learners and trace back this phenomenon to the individual's fragile self-image. I managed to find evidence for this: based on the experiences of the learners presented by Dörnyei and Mentzelopous (2022), HTW has been proved to be connected to the person's attitude to failure, as a deciding element of their success in L2 learning was their ability to be persistent, meaning not to become disengaged when failure occurs. Meanwhile, HTW experiencers reported the opposite of this (Almukhambetova & Hernández-Torrano, 2020a, 2020b; Barbier et al., 2019; Mendaglio, 2012); they became avoidant of the subject, which was linked to perfectionism, a lack of coping skills and insecurity in their own abilities, their own exceptional status (Blackburn & Erickson, 1986; Brophy, 1991; Burke & Yuen, 2007). These findings support my claim that the reason behind exceptional L2 learners' HTW experiences is a self-image crisis, resulting from internalizing a restrictive idea of exceptionalism as an identity.

The greatest limitation of my research is that my current exploration of HTW among L2 learners was carried out by synthesizing results of general HTW research with experiences of L2 learners, which can only lead to highly hypothetical conclusions. Arguably, the key realization during the preparation of this article was that the number of studies dedicated to HTW research is inadequate, which Almukhambetova and Hernández-Torrano (2020a, 2020b), and Mendaglio (2012) also state, and research that specifically aims at exploring HTW in L2 learners is practically non-existent. For this reason, there are no data concerning how prevalent HTW might exactly be among L2 learners, but existing HTW research does not suggest the phenomenon being exclusive to any field of study, rather its universality is implied. Furthermore, Dörnyei and Mentzelopolous (2022) recorded an L2 learner's experience that can be categorized as HTW, so there is evidence that to some extent, HTW is present in the group of L2 learners. Therefore, I argue that conducting empirical research that focuses on HTW experiences among L2 learners is essential to have a clear picture about this issue. For a start, it would be particularly interesting to study the students of English Studies BA and MA programs and English teacher trainees.

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