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| **Esperanto and Education: Toward a Research Agenda**Sponsored by the [Esperantic Studies Foundation](file:///C%3A%5CUsers%5CYevgeniya%5CDocuments%5CDisvolvado%5CDevelopment%20Officer%5CWebsite%5Cesperantic.org%20dosieroj%5Cdok.esperantic.org%5Cindex.htm)Prepared by: Dr. Alvino E. Fantini, DirectorBilingual-Multicultural EducationMaster of Arts in Teaching ProgramSchool for International TrainingKipling RoadBrattleboro, Vermont 05302Dr. Timothy G. Reagan Department of Educational Leadership School of Education University of Connecticut 249 Glenbrook Road Storrs, Connecticut 06269 31 October 1992 |

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**ABSTRACT**

**Overview**

Funded by the Esperantic Studies Foundation (ESF), this project sought to explore various areas of concern relevant to Esperanto education. This was accomplished by reviewing the research literature concerned with the teaching and learning of Esperanto, as well as the recent research literature on language education in general. Based on the research base, the authors propose and prioritize selected potential research and development activities related to the teaching and learning of Esperanto in the U.S. context.

The study addresses five interrelated areas: (1) research on first/second language acquisition and bilingualism/bilingual development; (2) research on the teaching and learning of Esperanto; (3) research on language pedagogy and teacher education; (4) review and evaluation of selected Esperanto instructional materials; and (5) policy issues related to developing and implementing Esperanto programs in public and private schools. A final section of the report outlines various recommendations for future directions, and culminates in four specific proposals. Although the report is a collaborative effort, Dr. Alvino E. Fantini took primary responsibility for sections 1 and 3, and Dr. Timothy G. Reagan took primary responsibility for sections 2 and 5. Sections 4 and 6 were written jointly.

[**Section I: First/Second Language Acquisition and Bilingualism/Bilingual Development**](file:///C%3A%5CUsers%5CYevgeniya%5CDocuments%5CDisvolvado%5CDevelopment%20Officer%5CWebsite%5Cesperantic.org%20dosieroj%5Cdok.esperantic.org%5Cf-r2.htm#one)

Section I is divided into three parts, dealing with first language (L1) acquisition research, second language (L2) acquisition research, and research on bilingualism and bilingual development. An overview section discusses connections between L1 and L2, and traces shifts away from behaviorist theories to cognitive code explanations to account for language development. The discussion includes comments on an innate language capacity common to all human beings, an optimal age for language development, and the notion of internal cohesion, or the tendency of learners to develop an underlying schema (competence) which accounts for their performance at each stage of development. Implications of these notions to acquisition of Esperanto as a L1 are then discussed, posing a question as to whether the structural simplicity of Esperanto may lead to earlier acquisition than with other languages, or whether the rate of L1 acquisition is constrained by cognitive developments.

A review of L2 research again underscores the shift from behaviorist theory to the "creative construction" hypothesis as the best explanation for language development, echoing findings in the L1 literature. The L2 literature, however, introduces additional concepts, such as interlanguage and "fossilization," as relevant to the L2 experience. Even more important, L2 research points to numerous learning variables characteristic of older learners which do not necessarily mediate the L1 process, such as motivation, opportunity, ability and other individual attributes. Discussion of older learner strategies beyond the optimal age for language development suggest that older learners may learn a L2 more efficiently than younger individuals even while not demonstrating native-like abilities, especially in certain areas, such as phonology. Aside from learning strategies, others discussed are the communication strategies typical of L2 learners and the effects of their non-native speech on listeners.

Implications from the general literature on L2 development are then reviewed with specific reference to Esperanto. One important implication is that Esperanto educators must shift emphasis from teaching to learning, and from the subject matter to the learners (and their reasons and strategies for learning). Learner errors and interlingual stages suggest new attitudes for effective teachers. Other implications point to a need to define proficiency, address the learner's internal syllabus (in contrast to the external syllabus inherent in a course of instruction), and deal with L2 learning as an intercultural process.

In the third part of Section I, dealing with bilingualism and bilingual development, individual bilingualism is defined and contrasted with societal bilingualism. Since it is difficult to describe the behaviors of all bilingual individuals under a single definition, profiles are suggested which better capture the traits of individual speakers. Descriptors and types of bilinguals are discussed, followed by exploration of the patterns of language use which result when two languages are operant and the contextual factors which bilingual speakers take into account which guide them in their choice of one of the other language. Bilingualism with and without biculturalism is examined, as well as the reverse, that is, biculturalism without bilingualism. In any case, learning a L2 like Esperanto may entail developing cross-cultural effectiveness in addition to linguistic proficiency, as is the case with other developing bilinguals. This has implications for Esperanto learners and speakers and for teachers of Esperanto.

[**Section II: Teaching and Learning Esperanto: The Research Base**](file:///C%3A%5CUsers%5CYevgeniya%5CDocuments%5CDisvolvado%5CDevelopment%20Officer%5CWebsite%5Cesperantic.org%20dosieroj%5Cdok.esperantic.org%5Cf-r2.htm#two)

Advocates and proponents of Esperanto, inspired by their enthusiasm for both the language and the movement with which it is affiliated, have over the years made numerous claims about the educational, social and political advantages of Esperanto. These claims have been supported by a combination of common sense, logic, anecdotal evidence, and a limited but growing corpus of scientific studies. In this section of the report, an effort was made to clarify the educational claims that have been made by supporters of Esperanto, and then to examine and evaluate the evidence available with respect to each claim.

Based on the research that has been conducted thus far on the teaching and learning of Esperanto, a number of conclusions can be drawn with reasonable certainty. The empirical evidence, though far from incontrovertible, is generally in accord with anecdotal evidence with respect to claims about the ease of learnability of Esperanto, its propaedeutic effects on learning additional languages, its use in teaching students about the nature of language in general, and its positive affective benefits for students. Claims for which there does not appear to be substantial, clear empirical evidence include the claim that the study of Esperanto will increase students' knowledge of and aptitude in their own native language, that the study of Esperanto will result in a countering of ethnocentrism and the development of an attitude of tolerance on the part of students, that there may be non-language related propaedeutic effects from the study of Esperanto, that the study of Esperanto will result in a more global perspective on the part of students, the claim that Esperanto is especially appropriate for students with special needs, that the study of Esperanto will encourage students to study other languages, and that Esperanto may be able to be taught more efficiently and explicitly than can national/ethnic languages. It is important to note that the lack of empirical evidence with regard to these claims in no way suggests that they are untrue; rather, we are left in these cases with (sometimes quite compelling) anecdotal evidence and personal experience in evaluating them. Further, the lack of empirical research on some of these topics gives us insight into where future research studies might best be conducted. It is also noted that many of the areas in which further research is needed would in fact be difficult, if not impossible, to adequately address using traditional, quantitative research approaches. They would, however, be ideal topical areas for researchers utilizing qualitative and naturalistic research methodologies. Further, while the research base with respect to the teaching and learning of Esperanto suffers from some serious shortcomings, the same could be argued with respect to the teaching and learning of virtually all other languages, especially in the cases of what are sometimes called the "less commonly taught languages."

[**Section III: Language Pedagogy and Teacher Education**](file:///C%3A%5CUsers%5CYevgeniya%5CDocuments%5CDisvolvado%5CDevelopment%20Officer%5CWebsite%5Cesperantic.org%20dosieroj%5Cdok.esperantic.org%5Cf-r3.htm#three)

A review of the general literature on language pedagogy and teacher education is provided in this section. Numerous advances have been made in the last few decades in the field of language education with significant implications for both areas. In the area of pedagogy, distinctions are made between approach, method and technique, which are hierarchically ordered from broadest to most specific teaching interventions. Eight prevailing methods are then presented and examined, from the grammar-translation method (the oldest) to the communicative approach (the most recent). Each is discussed in terms of goals, teacher-learner roles and interaction, the process, language areas, skills addressed, and so forth.

Despite availability of a wide variety of methods and techniques, each with its attendant advantages and disadvantages, it is the teacher who ultimately must be able to implement his or her own personal approach in accordance with the specifics of each teaching context. A framework for synthesizing and developing an effective approach is suggested to insure not only attention to linguistic aspects of the language experience, but to cultural and intercultural aspects as well.

From the foregoing discussion, numerous implications for Esperanto education become apparent. Most importantly, focus shifts from the particulars of each language system to the particulars of each learner and learning situation. Put another way, the emphasis is on "learnability" rather than "teachability." Given this view, claims about Esperanto's ease of learnability becomes less significant than other aspects of this worldwide movement, such as its cultural and philosophical aspirations. However, given continuing interest in substantiating claims about Esperanto's learnability, cautions are proffered regarding "comparable conditions" of experiments to ensure that results are not prejudicial to what is hoped to be proved. This is an important consideration, given the level of quality instructional materials and the lack of preparation of many of those who teach Esperanto. Regardless of the results, however, the "effective teacher" ultimately emerges as one of the most important factors in the teaching process, and this finding leads to a second part of this section, which addresses teacher education.

Six areas of competency areas are discussed under teacher education, including inter/intrapersonal relations, cultural/intercultural competency, language/linguistics, learning and acquisition, pedagogy, and professionalism. Admittedly, few teachers are well prepared in all six areas. Given this situation, there appears to be need for teacher education guidelines, teacher self-assessment tools, and in-service training. Specific teaching skills in areas of course design, developing appropriate learning environments, lesson planning and implementation, and assessment and feedback emerge as discrete skills to be developed. Teacher assessment and certification are normal processes for most teachers of language and need to be strengthened for Esperanto educators as well. One strong implication to emerge is recognition of the importance of the quality and effectiveness of the teacher. This overshadows most other aspects of the teaching/learning process since in most cases the teacher has the power to conceptualize, design and implement the educational program.

[**Section IV: Review of Esperanto Instructional Materials**](file:///C%3A%5CUsers%5CYevgeniya%5CDocuments%5CDisvolvado%5CDevelopment%20Officer%5CWebsite%5Cesperantic.org%20dosieroj%5Cdok.esperantic.org%5Cf-r3.htm#four)

A search was conducted of Esperanto instructional materials through a variety of sources. Cursory review of material extant provided a general sense of the quality of resources available for those wishing to learn Esperanto. Eleven courses were then selected for more detailed review and each was evaluated in accordance with a checklist developed for the purpose. The checklist directed attention to: goals and objectives, the syllabus design, component parts, areas addressed, skills addressed, general presentation, content, process, evaluative devices, and several other factors.

This review not only provided a general glimpse of the quality of Esperanto instructional materials, but also helped to identify various factors to consider when developing new courses of instruction. Suggestions are made with regard to instructional components, syllabus design, and other criteria. A selected bibliography of instructional materials is included.

[**Section V: Educational Policy and Esperanto in the United States**](file:///C%3A%5CUsers%5CYevgeniya%5CDocuments%5CDisvolvado%5CDevelopment%20Officer%5CWebsite%5Cesperantic.org%20dosieroj%5Cdok.esperantic.org%5Cf-r3.htm#five)

There is an extensive body of literature concerned with the nature, purposes and evaluation of both educational policy and language policy. Given the focus of this report, the literature dealing with educational policy, and specifically, that which deals with educational policy in the United States, was of particular interest. Central points from this literature related to educational policy, policy development, policy implementation and policy evaluation, as these relate to issues of Esperanto education, were discussed. The model on which this discussion was based is that proposed by Donna Kerr, which has been utilized not only to evaluate strictly educational policies, but also in the analysis of educational language policies. Following the general discussion of educational policy, the report then focuses on the implications of the discussion for the case of Esperanto in the American context. There is, to date, virtually no usable information about the number of schools (public or private) in which Esperanto is taught in the United States, and relatively little information about the availability of Esperanto courses in colleges and universities, though this latter information is considerably easier to locate. What information is available with respect to K-12 schooling suggests that where Esperanto is offered, it is generally present as a result of individual initiative and effort. There is no doubt that such "grass roots" efforts are taking place in many parts of the country; during the course of the preparation of this report, for instance, we were told of such efforts in California, Hawaii, Illinois, Oregon, Washington, and several other parts of the country. Further, AATE tries, thus far somewhat unsuccessfully, to keep track of such efforts. These "grass roots" efforts are valuable and worthwhile activities, but they do not provide a solid base for policy development. In addition, it is important to recognize that there are some major risks involved in such programs. First of all, the quality of instruction is likely to vary dramatically, reflecting in part the huge variation in linguistic competence found among teachers seeking to teach their students Esperanto. Some of these teachers are highly fluent, skilled users of Esperanto, while others are very much beginners themselves. Second, while fluency in Esperanto is obviously an important quality to be desired in teachers of Esperanto, competence in a language does not automatically confer competence in the teaching of the language, and the preparation of teachers of Esperanto in the United States is basically haphazard at best. Finally, while the individuals involved in these "grass roots" efforts should be recognized and commended, the fact that Esperanto is generally only available as a consequence of such voluntary "donations" of time, energy and materials, means that there is a strong likelihood that it will continue to be seen by school authorities as beyond the pale of normal school activities, more comparable to visits by local fire fighters than to foreign language instruction. It is important to stress here, however, that these comments are essentially speculative, since we really do not know anything in a reliable fashion about such "grass roots" efforts to provide Esperanto instruction in the K-12 setting.

Perhaps the greatest challenge in promoting the teaching of Esperanto in American schools, both public and private, is its public image. Esperanto as a language is seen as idealistic and unworkable; the individuals who are most closely allied with the Esperanto movement are seen as "cranks," and are believed to be socially marginal, on the "fringe," and perhaps even as "cultists." The claims about the nature of Esperanto are easily addressed and can be demonstrated to be false; such demonstrations, however, do not generally address the underlying view of the language and its speaker community. Similarly, it is reasonable to suspect that no matter how compelling the linguistic and educational research were to be with regard to the positive effects of learning Esperanto, such research would not, on its own, be enough to encourage policy-makers to sanction its adoption as part of the school curriculum.

In order to succeed in having schools adopt Esperanto as a legitimate part of the school curriculum, it is suggested that a number of interrelated factors need to be taken into account. Specifically, efforts must be made to offer a reasonably compelling case for the teaching of Esperanto. Such a case could focus on any of a number of benefits, but should be made in a manner that does not suggest that merely teaching Esperanto will solve other significant problems, nor should claims be made about the learnability of Esperanto (especially specific comparisons about the time needed to learn Esperanto versus that needed to acquire a national/ethnic language), unless further research is done. The case to be made must tie the existing research base to current school and social needs in a believable fashion, and must identify specific social desires for the schools that can be met most effectively and efficiently by the teaching of Esperanto. Further, it is important that those advocating the teaching of Esperanto distinguish between the educational benefits of such instruction, in which policy makers and educationists ought to be interested, and the longer-term social and political benefits that play an important role in the Esperanto movement, which can, in the American context, sometimes pose problems in making an educational case for teaching the language. In short, although this is to some extent paradoxical, it may be necessary, at least initially, to distance Esperanto as a language from the Esperanto movement for it to gain the credibility necessary in order to be adopted as a formal part of the school curriculum. This is not to suggest, however, that the social and cultural aspects of Esperanto and the Esperanto movement should not be included in any language training program; clearly they should be. The key element in the discussion in this section of the report is on the importance of gaining credibility for Esperanto as a legitimate educational endeavor. If the problems associated with Esperanto's image can be addressed through the media and as a result of public exposure and education to the extent necessary for model programs to be established, then other, broader policy-related activities (such as teacher certification in Esperanto) can be considered. In short, a more accepting environment for Esperanto must be created. As long as Esperanto is regarded as "crazy" or marginal, any effort to get it taken seriously by classroom teachers and other educators is likely to fail. Even sympathizers will be driven away from Esperanto by fear of disapproval. Further, the ultimate challenge remains, to a considerable extent, the public's view of and concern with Esperanto.

[**Section VI: Recommendations**](file:///C%3A%5CUsers%5CYevgeniya%5CDocuments%5CDisvolvado%5CDevelopment%20Officer%5CWebsite%5Cesperantic.org%20dosieroj%5Cdok.esperantic.org%5Cf-r4.htm#six)

This section restates the project purposes and then discusses a variety of investigative methods relevant to research in Esperanto education. These include not only traditional quantitative research methods, but even more importantly, qualitative and naturalistic research methods which are often more appropriate for social science and educational inquiry. For example, multi-methods research includes surveys, case studies, fieldwork, and ethnographic studies. A list of potential areas for investigation within Esperanto education is then provided, grouped in accordance with each of the five sections of this report. Items in each area are prioritized in terms of their importance and potential impact on advancing Esperanto education in the United States.

Given limited funding and other resources, however, four specific proposal are then identified, proposed and discussed, reflecting the particular view of the writers of this report. Finally, a discussion of outreach and funding possibilities is included in hopes of furthering ESF's future efforts by extending beyond Esperanto networks to involve other professionals in related fields.

An extensive set of appendices and bibliography are included at the end of the report to provide further information and background for issues discussed in the body of the report.

**Acknowledgments**

The authors are grateful to several individuals and organizations for their help, support and assistance in preparing this report. While it is not possible to thank each person to whom we are indebted by name, we do wish to draw special attention to the following individuals: first of all, to the Esperantic Studies Foundation, for initiating and funding the project, and in particular, to Jonathan Pool, for providing the initial background paper and on-going guidance throughout the project; to Catherine and William Schulze; to A. Mario Fantini, for his assistance in researching background materials; to Humphrey Tonkin, both for his on-going assistance throughout the project and for making available his extensive collection of resources and materials; to Steven G. Belant, President of the Esperanto Society of Sacramento, for contributing items from the ELNA Congress and other background information; to Dorothy Holland-Kaupp and the American Association of Teachers of Esperanto; to the students and participants at the San Francisco State University Summer Esperanto Workshop and the Esperantists at the 1992 meeting of the Esperanto League for North America who met with us and shared their backgrounds, experiences and concerns; and finally, to both the Universala Esperanto-Asocio and the Esperanto League for North America.

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[Esperanto Studies and Interlinguistics](http://esperantic.org/ced/studies.htm)

Send questions or comments to Mark Fettes.