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# CRISIS, CHANGE, AND PERSPECTIVES

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# Language Use during Romanian Classes in Bilingual Settings. A Qualitative Approach

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**Abstract.** Education is one of the defining areas of language policy, as on this level we can track the features of the practical implementation of language ideologies. In my study, I deal with the question of teaching the official language, i.e. Romanian, in schools where the working language is Hungarian. I outline a summing-up situation based on the macro indicators (following demographic, environmental aspects), then focus on the micro level related to the question under discussion, namely to what is happening in the classroom, paying special attention to the organization of the linguistic resources in classroom interaction. In order to have a deeper understanding of the phenomenon, I analyse 25 structured reflective diaries and try to identify what kind of local interpretations are there for code-switching in the classroom and what individual solutions are used by different teachers for organizing the learning process.

**Keywords:** classroom interaction, bilingualism, acquiring Romanian L2, structured reflective diary, code-switching

## Introductory remarks

In planning, regulating, and implementing language instruction, we can distinguish between three important levels (Shohami 2006): (i) the macro level is represented by language ideologies (language policies, language pedagogy, principles of language approaches), and they are enacted through laws and norms of language use; (ii) the intermediary level, where the regulation of content takes place in relation to the mentioned values, and this is echoed in the curriculum and school books; (iii) the level of "de facto" language policies, the level of language

use, which in case of formal learning is the scene of classroom interaction and of the true heuristic encounters. From the perspective of a developing personality, this level is the most defining context, yet the least accessible one.

From the point of view of language use, the school is the space where classroom register, the formal and informal language use, the language of instruction and that of the environment are present at the same time. What is more, the school is the spot where different languages are acquired. For example, in schools where the working language is different from the language of the majority, it is the context in which the native tongue, the official language of the state, and also foreign languages are taught and learnt.

The relations between various languages are approached by the different language teaching models in specific manners. Although each model is the carrier of local peculiarities, in the didactic approach to various languages we can distinguish between the following views: "dive-in" language learning (Gorter–Cenoz 2017); approaches based on dual language use (Gorter–Cenoz 2017, Pisnjak 2013); translanguaging language pedagogy (Garcia–Wei 2014, Wei 2018, Heltai 2017).

Looking at it from this perspective, mother tongue plays a supportive role in the acquisition of the second or third language as well. Acquiring the mother tongue (or family languages) takes place at the same time as getting acquainted with the world through the given culture and language (Tolcsvai 2015), and this process happens by following a model, in *genuine* language situations. "The acquisition of the second language happens when already familiar with the mother tongue, in the context of already being acquainted with the world, from the specific perspective of a given culture and language"[1] (Tolcsvai 2015: 121).

In the following parts of the present paper, we will address the question of learning the official language of the country in the context of minority bilingualism, having in mind this rapport.

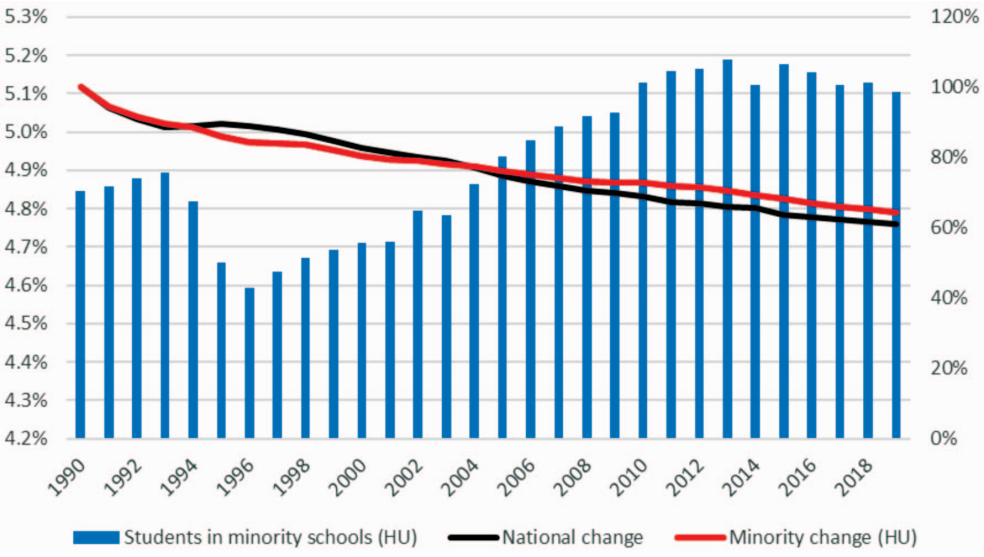
## Romanian schools with Hungarian as the working language and the acquisition of Romanian

Among Hungarian communities living in Romania, which makes up around 6.1% of the total population of the country (based on the 2011 census),[2] the acquisition of the Romanian language takes the following path (Tódor 2018): (a) besides the formal education, the proximate language environment (family, community) provides opportunities for spontaneous language learning and language use or

1 Translation from Hungarian to English belongs to the author.

2 Data available online in Romanian: http://www.recensamantromania.ro/rezultate-2/ [02.02.2020].

(b) the acquisition of Romanian happens in institutional settings, the proportion of situations for using the language outside school being rather low. This latter case is characteristic for regions and settlements where the Hungarian minority is majoritarian. In this context, the communities under discussion have to choose between two dominant possibilities regarding schooling: (i) one possibility refers to situations where parents choose to send their children to a school where the working language is Romanian,[3] first of all in order for the children to "have better chances" (Sorbán 2000); (ii) the other possibility represents an educational model which favours conservation of the mother tongue, a situation in which students learn Romanian language and literature as a distinct school subject (also working language). Naturally, different linguistic choices lead to different linguistic attitudes, different habits with respect to language use, different linguistic identities and forms of behaviour. The figure and map provided below illustrate the quantitative indicators of the two mentioned socializing paths, based on data collected in 2019–2020.



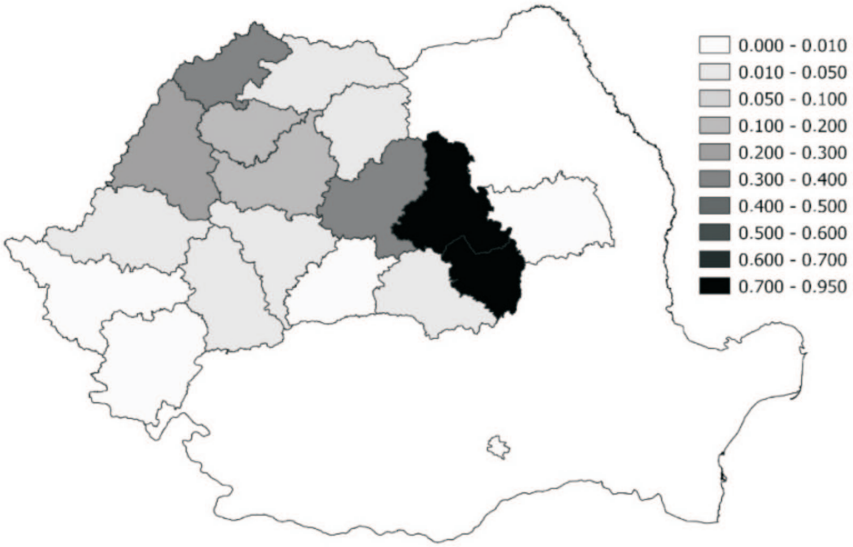

*Source: INS Tempo*

**Figure 1.** *Hungarian minority schools in Romania, 1990–2019*

In the case of the already mentioned school population, the question of effective school instruction of the official language is not only a question of education policy or organizing education, but it also has a mobility-related and economic

3 Concerning the percentage of students who chose to learn in Romanian, the following data is known, based on Barna et al. (2016): in 2011, the proportion of Hungarian children not learning in their mother tongue was estimated at around 12–14%.

role since knowledge of the official language shows strong relations with social status, building a successful career, furthermore being efficient in the economic sphere and labour market as well as with the ethnic distribution of different jobs[4] (Sorbán 2014, Csata 2016).




*Source: INS Tempo, map edited by László Csák*

**Map 1.** *The distribution of Hungarian students (based on data from 2019, 1 = 100%)*

## The acquisition of Romanian and the reform of curriculum

Based on the 2011 law and a 2017 ministerial order, in the Romanian education system there occurred a curricular parallel in regulating the content of the subject known as Romanian language and literature, since *one* subject (Romanian language and literature) was associated with *two* items of the curriculum (one for the native speakers of Romanian and another one for non-native speakers). Of course, school books have been developed based on these two curriculum items. Yet, the curricular parallel can be traced in the case of different generations too,

4 "5–8% of the differences concerning the income of individuals belonging to the Hungarian community in Transylvania can be explicitly explained by knowledge of Romanian" (Zsombor Csata 2019, retrieved from: https://penzcsinalok.transindex.ro/lokalis/20190418-mennyivel-keres-kevesebbet-az-aki-nem-tud-romanul – translation from Hungarian to English belongs to the author).

as in the above mentioned institutions we can distinguish between two types of generations: students who learned Romanian based on the old curriculum and those who followed the new one (at the end of the school year 2020–2021, the first assessment of the 8th grade students will take place based on the new curriculum). However, at this point, it can be stated that the success of the practical implementation of curriculum development can be reached by the cooperation of exterior (framework for organizing the learning process, principles for assessment and evaluation, etc.) and interior factors (preparedness of educators, motivational background, etc.). The main characteristic of the period between 2017 and 2020 was delegating the responsibility of organizing the learning process to the level of schools (and classrooms) and raising awareness of it.

## The function of code-switching in classroom interactions

Classroom interaction is a specific form of creating meaning, as it is planned and guided (Hinkel 2006, Jessnera–Allgäuer-Hackl 2020). First of all, it is characterized by a sequence of purposeful speech situations and the co-existence of classroom language and the vernacular; furthermore, it is structured by short- and long-term objectives (e.g. arousing attention or developing skills). In order to put ideas of language pedagogy into practice on the macro level, teachers opt for different individual methodological and language use strategies. According to these choices, classroom interaction reflects individual interpretations of governing principles and of the hidden curriculum. Consequently, success or failure in the classroom is influenced by the participants themselves and the experience of meanings developed together (Bannink–Van Dam 2006; Teppo 2018). The characteristics of classroom interactions are shaped by the working language as well as by the dynamics of practices related to both teachers' and students' language use. The above mentioned decisions concerning language use result in dual speech situations, which are strongly structured by code-switching.

The phenomenon of code-switching has been dealt with by several research paradigms based on different approaches (Auer 1984): some used ethnographic or (structural) linguistic viewpoints, others investigated language attitudes concerning code-switching. Language configurations brought about by different speech situations carry the features of the relationship between different languages, and those of language acquisition as well (Bartha 1999, Navracsics 2000, Vančo 2019).

In fact, the above mentioned linguistic settings can be outlined along the functionality of the two languages activated in different contexts, where the organizing principle is the local meaning. Their functionality can be interpreted

from two different approaches, namely from the participants' perspective on code-switching and from the discourse-centred point of view. In the discourse of bilingual speakers, Peter Auer (1984) distinguishes between alternative (intermittent) language use (or double language use) and situations of code-switching. In interpreting these switches, he adopts grammar-centred (pursuing the morphosyntactic features of code-switching), interaction-based (investigating the correlations between meanings and functions), and socio-linguistic (tracking the interpretation of the community's code-switching) approaches.

As compared to speech situations outside school, classroom code-switching (Nikolov 2000, Lin 2008, Levine 2011) fulfils specific functions.[5] During foreign language classes, it plays an important role in conveying the meaning, in ensuring comprehension, and in organizing learning. Research carried out by Cummins and Swain (1986) and Cummins (1981) prove the motivating force and the comprehension-facilitating function of code-switching occurring in classroom interaction as well as the balancing function of the target-language culture influence. Based on other research observing Romanian classes in schools where the working language is Hungarian (Tódor 2005), we found that in classroom interaction code-switching primarily appears on two important levels. On the one hand, planned code-switching can consciously facilitate achieving educational objectives (such as explanation, comparative view, or translation); on the other hand, unplanned code-switching can also be observed, and it can be related mostly to spontaneous speech situations and conveying messages of a more personal nature. In what follows, we will present the results of previously carried out research related to the topic (Tódor 2005, Tódor–Dégi 2018).

Based on previously analysed data, we can state that, as planning is concerned, the target language represents the medium for classroom language, and teachers tend to maintain this (Tódor–Dégi 2018). Usually, the proportion of the planned situations in which code-switching occurs is low; most often, students are the ones to initiate such speech situations, when personal implication is very important for the speakers, or there is an express need for quicker and more efficient communication. At the same time, we can also affirm that the use of code-switching for didactic purposes is a phenomenon that largely depends on the teacher, the class community, and the topic of the lesson.

5 Throughout the research, the question of using the proper notions arose quite often, namely if we should refer to the speech situations that emerged in the classroom as *translanguaging* or as *code-switching*. In her study, Rácz (2021) uses the term translanguaging to name the same situation. Although the term translanguaging is closely connected to classroom interaction, too (Cen William 1996, qtd. in Wei 2005), in my interpretation, in situations of asymmetric bilingualism in the classroom, we can speak about code-switching first of all since we are speaking about base-preserving bilingualism (Lanstyák 2006), in which code-switching concerns certain registers, and it also reflects linguistic relations. The features of linguistic production are shaped by speech intentions, and in our case they are also structured by specific learning objectives.

During the observed Romanian classes, the idea of keeping communication in L2 is strongly present in the discourse of the teacher. What is more, there is a kind of "specialization" concerning language use, which can be observed in different phases of the lesson. In speech situations, which are more controlled or routine-like, the target language is preferred, while code-switching occurs most often in practising free speech. The teaching language (especially in explanations) is the target language, yet understanding is often made easier by activating the mother tongue. In certain phases of the learning process, the exposure to the use of both languages is stronger. Such moments are, for example, maintaining discipline or proper understanding of certain tasks in organizing learning, cases in which the code-switching phenomenon or repeating sentences in the mother tongue occur more frequently in order to achieve a more accurate understanding.

To sum up, we can say that during Romanian classes we observed that we were able to distinguish between situations involving code-switching and parallel language use (where the teacher repeated the message both in L1 and L2) in classroom interaction.

## The topic of the research

In the present paper, we focus on mapping the linguistic features of classroom interaction in order to get acquainted with the strategies concerning language use during Romanian classes in schools where the working language is Hungarian. In fact, we wanted to find out what individual solutions, what tools of communication are activated by teachers for achieving a more effective organization of classroom activity and in order for students to realize that the learning activity, the discovery process belongs to them. The research pursues individual and local interpretations of the phenomenon of code-switching, and it highlights the verbal dimensions in the mechanism of classroom interaction.

The characteristics of the communicative verbal situations differ from those of the written discourse (Manu 2008), and, implicitly, unilingual settings of communication differ from bilingual ones. In our approach, we were interested in the correlations of meaning constructed in the process of a dialogue,[6] and we started from the hypothesis that the way people use linguistic resources performs certain functions in classroom interaction.

Tracking classroom interaction is also indicated by pedagogical culture since (at least on the level of declarations) we are investigating situations in the context of a communicative-functional approach in language learning, where communication skills are not only objectives but also tools. All those speech

6 *Dialogical Meaning*, Auer 1984.

situations were considered units of analysis where, for one reason or another, the mother tongue also occurred beyond the use of the official language (L2).

The type of bilingualism we are investigating concerns students who have socialized in a dominant Hungarian environment (as illustrated in *Map 1* and *Figure 1*), where respondents can be considered special additive bilinguals (multilinguals) yet the acquisition of the second language happens mainly in institutional, formal learning context. In the motivational background of the learning process, we can find further studies and the possibility for mobility on the one hand and a more effective social integration on the other. In the last few years, this type of language learning – which is based on instrumental motivation – has been reconfigured in a special way by the prestige and "learnability" of foreign languages, first of all by the prestige and "learnability" of English.

## Research methodology

The phenomenon of code-switching in classroom interaction, which is the topic of the present investigation, has been addressed in previous phases of our research from different perspectives. In a study published in 2005, I summarized the experiences of a complex research in which the phenomenon was looked at from teachers' and students' perspectives, through qualitative data analysis (based on a questionnaire), but structured observation and focus group investigations were also adopted. Another paper, published in 2018, was based on the comparative analysis of data using the method of participant observation.

The present study focuses on a single language-learning context, namely the attitude towards language use during Romanian classes. This time, we were interested in the attitudes and judgment formulated by the teachers related to the topic; consequently, the data to be presented reflects their inner perspectives, and it attempts to provide a glimpse on what teachers think about the possibilities of code-switching, its advantages and disadvantages.

In the research, we have selected bilingual subjects, more exactly teachers of Romanian whose L1 is Hungarian, starting from the idea that in their case there is a higher probability for alternately activating the two different languages. The 25 respondents of our sample were selected from three different counties in Romania, and they were teaching Romanian language and literature in urban and rural areas where the Hungarian minority constitutes the majority population. One teacher works in a rural area and teaches simultaneous classes.

Considering their age, teachers are 26–48 years old, and there are three male and 22 female teachers. The respondent teachers have socialized in different university centres. We have selected the respondents using the snowball sampling

method: individuals involved in the research proposed other teachers to join the process of providing their opinions.

For collecting data, we have used the structured reflective diary, since in order to understand the phenomenon of language use properly, we thought it necessary to interpret the experienced attitudes, also to analyse their inner mechanisms. Choosing the structured reflective diary was justified, as this particular method provides opportunities for teachers to organize their reflective opinions (values, beliefs, attitudes, judgments) in a written form, based on their individual experiences (in our case, concerning language use). We are speaking about evocation based on introspection (for more on the introspective method, see Mackey–Gass 2005), which has advantages on the individual as well as on the community level. The method provides opportunities for using different tools; one of its most frequent variants is based on evocation supported by recorded material (e.g. video recordings). Beyond opportunities for implementation, the studies dealing with the theoretical background and research possibilities of the introspective method draw attention to its limitations (Kimmel 2006, qtd. in Sántha 2007) such as the following: lack of certain personality traits (self-confidence, open-mindedness, flexibility, self-esteem, down-to-earth self-assessment, well-developed communication skills, etc.) can act as a distorting factor in interpreting data; at the same time, it is important that the environment, the given context provide a supportive atmosphere for expressing individual opinions. We paid special attention to this latter aspect throughout the research, as we are investigating a matter concerning language use, which triggers at the same time banning and supporting attitudes in the educational culture.

## A few words about the research process

Getting ready to start the structured reflective diary presented in the previous subsection was preceded by a discussion in which we clarified the most important notions (e.g. code-switching, reflective journal), and we asked the teachers to observe their students' language use for two weeks and make reflective notes based on their observations, having in mind the following questions: (a) Has code-switching occurred? (b) If it has, how often? (c) What moment of the lesson can code-switching be related to? (d) What do teachers think about this phenomenon? (e) What advantages and disadvantages can they speak about? (f) In what conditions do the mentioned speech situations help the acquisition of the L2, and when do they hinder it?

It has to be mentioned at this point that we encountered one single diary entry referring to the attitude towards the method used in the research and which also signals the possible distorting function of self-observation: "In the period between

18 and 29 November 2019, I was a lot more conscious linguistically. Probably self-observation itself inevitably influenced the results of self-observation, though it worked as a kind of diagnosing process...”[7][8] (4_19.11). The mentioned phenomenon is to be taken into account in the next phases of the research process as well.

Preparation for collecting data began in November 2019. We planned to set up representative teacher samples according to the types of settlements. However, as a result of the actions taken due to the pandemic, we were forced to reorganize data collection. Thus, by 12 May 2020, a number of 12 diaries were completed, and then in the period between September and October 2020 another 13 diaries, resulting in a total of 25 diaries available for analysis, since from the middle of March a chaotic subsequent period set in. Until the end of the school year, by 15 June, not every school managed to switch to real online learning. Consequently, we can find references to experiences with online learning only in the diaries that were completed during the later phase.

In the interpretation of the data, we have considered the ethno-methodological approach to be the most effective, as this approach builds from bottom to top. Consequently, we set off from the “knowledge” (set of norms) created and respected by the members of the community (Harklau 2005). Getting acquainted with this set of norms, mapping is only possible while observing interactions (talk-in-interaction, Auer 1998, Lazaraton 2005). We have analysed the diary entries based on main codes or main units (i.e. the key notions which occurred most often) and the subcodes related to them (thoughts, attitudes, emotions related to them).

## Reflecting interpretation of code-switching in the classroom

The occurrence of code-switching and its frequency appeared among the questions to start diary entries with. Analysing the entries, we can observe that when dealing with numbers, we have to interpret them very flexibly since these proportions might turn over even in the case of the same class community in the different phases of the learning process. The mentioned proportion is influenced to a great extent by internal factors such as (a1) *the content of the lesson* (the proportion of code-switching or the parallel use of two languages also increases with the frequency of grammatical notions) or (a2) *the level of difficulty of the texts* (explaining unknown words); also, certain external factors are mentioned, for example (b) *students' age* or the level of studies (the younger the students

7 Translations of diary entries from Hungarian to English are my own throughout the text.

8 The number in brackets represents the code of the diary and the date of handing in the diary.

are, the more often the parallel use of two languages appears) or (c) *the level of language proficiency* (beginners, advanced learners), etc. According to the answers provided by the respondents, we can state that the lower the level of the target language is, the more frequent code-switching becomes; and the more abstract the selected knowledge is, the more frequent the situations are when both languages are activated.

As opposed to previous research results, it seems more prominent in the reflective diaries that in the respondents' opinion the vast proportion of code-switching serves an unplanned didactic objective. These events are primarily called forth by certain situations of communication, and thus they are mainly attitudes towards a concrete situation. In the diary entries, the frequent codes, or indicators, that refer to this issue are the following: "it is shaped by a situation in the classroom" (25_21.03); it is defined by "the dynamics of the lesson or discussion" (9_20.02); "… it is brought forth by the situation itself; they understand the same explanation in one classroom but not in the other..." (7_20.02).

According to the respondents' view, the planned nature of code-switching can primarily refer to moments of the lesson aiming at explanation, at the comprehension of the presented knowledge: "In advance, I always mark in my notes the more difficult expressions and my explanations (…) the rest is brought in by the given situation…" (5_20.01).

Based on the presented data, it can be concluded that in the situations under investigation the language of instruction is the target language, while the language of learning and understanding carries individual and community-related features, according to the students' level of language proficiency. Thus, a specific language use configuration is activated, which is primarily justified by creating the local experience of meaning. In different phases of the learning process, the way linguistic resources are activated and organized plays a specific didactic or interpersonal role.

## Decisions concerning language choice in different classroom situations

Decisions concerning language choice are defined by the main objectives of the given moment in the language classroom. The figure below presents the ratio of the most important phases in organizing the learning process and code-switching, based on the diary entries of the respondents.

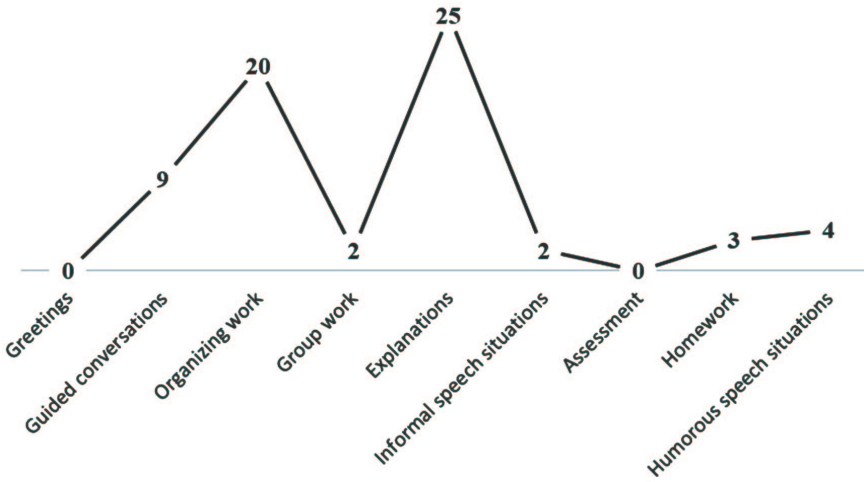



**Figure 2.** *Moments of classroom interaction and the percentage of code-switching (quantitative indicators), N = 25*

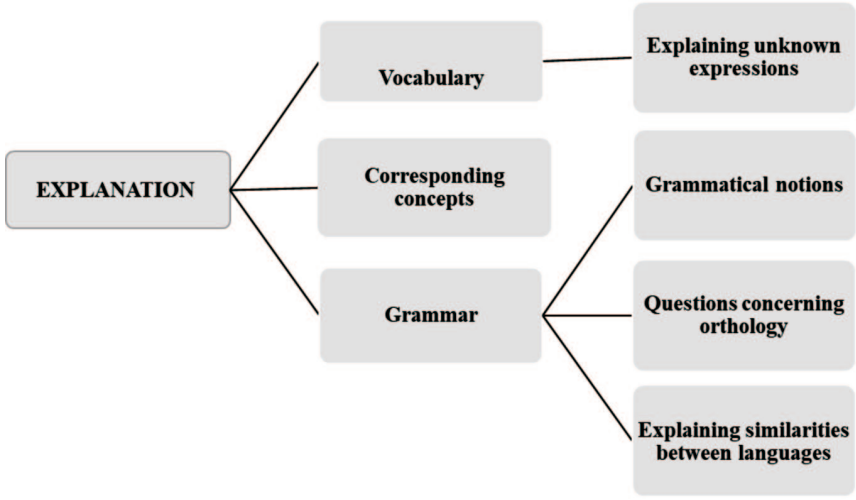



**Figure 3**. *Net of concepts illustrating the didactic role of linguistic resources displayed in explanations*

As displayed in the summing-up figure above, according to teachers' judgment, there are prominent moments and speech situations during language classes that can project the activation of L1 resources more frequently. Such a moment is the stage of explanations, where old and new meet. Capitalizing on the knowledge acquired in the mother tongue, this becomes the tool of efficiency in the comprehension process, and it results in code-switching. "Especially when

it comes to explaining words or concepts, because there are certain words, for example, in fairy tales or in classic texts of Romanian literature, where students understand better if they hear the expression which occurs in the Hungarian version" (7_20.02). "The use of L1 is required when explaining new concepts, especially if they have not learnt about it in their mother tongue, mainly in the 5th and 6th grades, but not exclusively" (15_20.02).

Based on the individual teaching experiences described in the diaries, the role of the code-switching traceable in the explanation can be illustrated in the net of concepts below.

Below we present a few illustrative diary entries:

a) related to explaining words or concepts:

"In the case of unknown words, I also use code-switching when it is a lot easier to reveal the Hungarian term than explaining it round and round and, eventually, ending up forced to say it in Hungarian" (1_19.11). "We do not translate the words but try to come up with at least two synonyms. If there is no synonym, we use the new words in sentences, I describe them to the students, and they have to deduce their meaning. We often associate the words with something, for example, with a similar sounding" (4_19.12).

b) related to grammatical notions:

"I always explain grammar rules in Hungarian. We usually discuss practical parts in both languages…" (4_19.12). "In the new curriculum, we don't have the kind of grammar that I still teach in the 8th grade; thus, explanations in Hungarian still occur mainly in this class and most often related to grammar issues…" (3_19.12).

c) translation, corresponding concepts:

"In case I can't explain something using body language and all, I translate a word or two, but as a rule of the thumb I do not translate anything" (15_20.02). "I sometimes translate Hungarian sentences into Romanian so that they understand, for example, the correct use of tenses…" (9_20.02).

Beyond explanations, organizing the learning process, discussing different tasks result quite often in parallel language use or situations of code-switching. Instructions are uttered in both languages, especially in lower grades, so that there is "less misunderstanding" (as one of the teachers puts it). In assigning homework, code-switching is used only in situations when comprehension is really hindered: "I always assign homework in Romanian. However, if I feel that it is necessary, I also explain in Hungarian what students are expected to do…" (15_20.02). In situations of communication that focus on evaluation, code-switching or using both of the languages in parallel aim at a higher level of consciousness. "If there is a frequent mistake, I always draw attention to it in Hungarian, as they understand better in Hungarian why something is not right [...] so that they don't commit the same mistake twice…" (10_20.02).

In informal speech situations, a wide range of examples of code-switching can be outlined. Such cases are, for example, situations based on playfulness, humour, or even irony, situations in which students' language level plays a key role in understanding them. "In order for the students to get the pun, they have to speak a given language well" (12_20.02). In spontaneous speech situations, the lack of linguistic knowledge might lead to activating resources in the mother tongue. Here is an example of such nature:[9] "A: B, **aşteaptă** eu! [B, wait I!] / (B looks at her, doesn't understand and has no reaction.) / T: A, what did you want to say? / A: I wanted to ask him to help me. / T: But A, **aşteaptă** means to wait; help is **ajută**. / A: So, that is why he has never helped me! (laughter)".

Looking at the relationship between L1 and L2 in the presented classroom interactions, we can conclude that there are four types of dominant behaviour when it comes to language use during Romanian classes: (a) a purposeful parallel use of both languages when a certain content is presented in the target language and then in the mother tongue in order for the "weaker students to catch up" and to support the experience of accurate meaning; (b) a communication-organizing strategy that redirects students to the target language in contexts where the student is speaking in Hungarian and the teacher answers them in the target language; (c) the most frequent speech situations are the so-called "in-between languages" code-switching situations, when activating the L1 resource aims at a more effective meaning production, or it is motivated by the use of some special terminology in the target language (e.g. "Which is the *predicat* [predicate] here?); (d) translating as a (comparative) method of language learning. At the same time, there also occur spontaneous, unintentional, context-dependent code-switching situations, which mainly indicate interpersonal experiences of meaning.

Based on the descriptions, we can also state that there is a conscious pedagogical attitude that builds on revealing the correspondences between the two languages, as well as a less conscious, context-shaped code-switching speech process in which the controlled feature of the situation is influenced by language routines or habits related to language use, too.

## To what extent is code-switching effective in classroom communication?

In the last two decades of the Hungarian education system in Romania, the question of acquiring the official language of the country more effectively has

9 Speech situation evoked by the third informant. The initials (A, B) replace people's names, while T marks the teacher. We are dealing with a classroom interaction in a rural area, where a new student has just arrived in the 7th grade. The new student's L1 is Romanian, having little knowledge of Hungarian.

been redefined multiple times. Although a new curriculum has been introduced, its effects will be visible and analysable in the following years. In the present conditions in education, the question emerging rather frequently is to what extent the time invested in the learning process leads to the acquisition of a functional knowledge. In order to have an insight in how educators perceive the indicators of efficiency in the educational process, it was important to outline what advantages and disadvantages of code-switching in classroom interaction had been highlighted. The key terms associated with the advantages are displayed in the net of concepts below and are summarized in *Figure 4.*

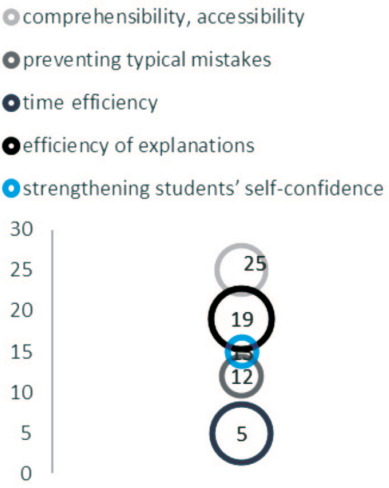



**Figure 4.** *Net of concepts illustrating the advantages of code-switching*

In what follows, a few illustrative remarks from the diary entries are presented.

"Its advantage is that the teacher knows what competences the students have in their mother tongue, what can be built on, what differences should be pointed out, and what typical mistakes might occur with Hungarian students. Teachers can bring together the two cultures, as they are acquainted with the traditions and cultural treasures of both nations" (17_20.09). "Its advantage is that it makes explanations more comprehensible, yet its disadvantage is that instead of communicating in the target language, it would turn classwork into a sort of translation exercise…" (5_20.01). "Translating one or two key terms might lead the students towards the solution" (10_20.02).

In the teachers' views, it appears to be a disadvantage if code-switching preserves students' thinking in their mother tongue or if it results in the "comfort" of unilingualism, though the fear from being held responsible or the idea of wasting time also occurs. On the whole, according to the diary entries, code-switching is not considered to be an effective solution, as it leaves less time for

practising the target language. Planned speech situations in the classroom are one of the best possibilities for practising their L2 in the case of these students. "I think that in order for teaching Romanian to be more effective, we need to reduce the use of the mother tongue to a minimum during Romanian classes" (13_20.02). In the figure below, we illustrate the considerations associated with the disadvantages of code-switching.

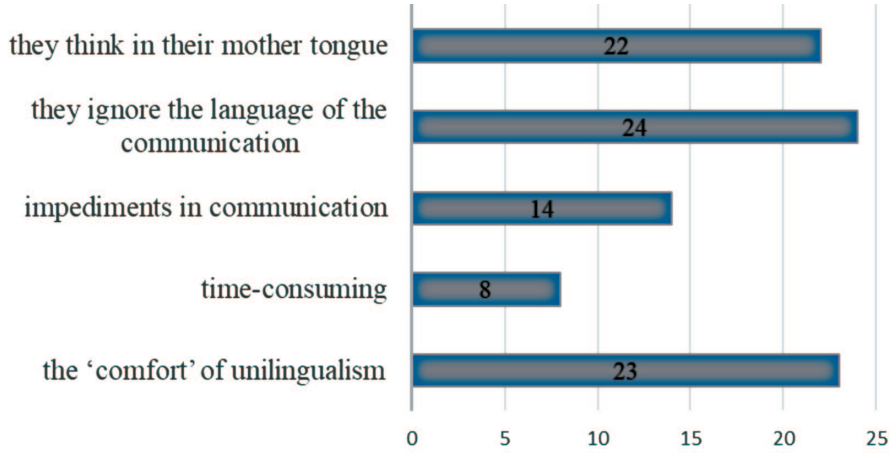



**Figure 5.** *Disadvantages of code-switching, N = 25*

In what follows, a few illustrative remarks are presented.

"The disadvantage is that students are not taken out of their comfort zones, so they do not try to understand instructions but rather ask questions in their mother tongue" (3_19.11). "In my opinion, the only disadvantage of code-switching is that in such cases we use Hungarian, and students don't develop their reflex to answer questions or solve tasks in Romanian. In turn, this is balanced by its huge advantage that we can easily and time-efficiently avoid any kind of misunderstanding or not understanding anything" (1_19.11).

## To what extent can code-switching be used effectively before transforming the language class into a mere "translation task"?

The responses presented in the previous subchapter of the paper discussed the wide range of code-switching situations in classroom interactions. Yet, it is important to determine to what extent their effective use in language classrooms can be considered. Based on the opinions recorded in the diaries, we can

affirm that when considering the effectiveness of code-switching in classroom interactions, certain indicators are to be highlighted. Code-switching is effective:

(1) "…when used for understanding new information, so not constantly (e.g. for translating every word, simple questions or instructions, etc.)" (16_20.11);

(2) "… if I have to help a student who has real linguistic impediments…" (4_19.11);

(3) "… until they do not ask for an explanation because it is more comfortable…" (11_20.02).

On the whole, it can be concluded that the phenomenon is effective until it leads to the comfort of unilingualism, while it supports comprehension processes in the target language, and it also stimulates the activation of target-language-based mental skills. Based on what has been stated so far, it can also be affirmed that in the judgement of the code-switching phenomenon a dual attitude has been outlined among our teacher respondents. In general, the educators do not consider it right when L1 resources appear too frequently in the context of practising L2. The use of code-switching is motivated by effective word comprehension or concept definition, by a quicker grasp of meaning, and by creating a safe emotional atmosphere for language learning.

In minority schools, code-switching also reflects the relationship between the given languages. Language use in schools might strengthen or soften the idea that code-switching serves the coordination of linguistic knowledge or language skills and the knowledge acquired in the mother tongue.

## Conclusions

The reflective nature of the summed up results points out that during Romanian classes in minority schools knowledge in the mother tongue, as a supportive background, plays an important role in experiencing different meanings. However, the organization of linguistic resources is structured by local productions of meaning. The mapped speech processes reflect the complementary and supportive nature of the way linguistic resources function.

The classroom implementation of the present curriculum requirements results in the following bilingual arrangements: (a) interactions with the purposeful parallel use of both languages; (b) "in-between languages" code-switching situations; (c) translation as method for language learning; (d) unintentional code-switching, influenced by spontaneous speech situations.

According to the respondents, the use of code-switching in language classrooms is beneficial until it supports comprehension processes in the second language and stimulates the activation of target-language-based mental skills. In this correlation, there is need for developing and operating a viable bi- or multilingualism, where

the mother tongue supports the acquisition of a second or third language, while the second or third language relates to the L1 culture with acceptance, so the mother tongue is considered a resource and not as an impediment. Thus, classroom interaction strengthens the acquisition of a functional institutional linguistic knowledge and the foundation of a supportive emotional background.

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# Pandemic-Triggered Online Teaching in Romania. A Language Teacher's Perspective

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**Abstract.** With the restrictions caused by the pandemic, schools closed and classes went online in the spring of 2020. Suddenly, teachers found themselves in unexpected situations they had to deal with. With limited IT skills and no training courses offered by the Ministry of Education guiding them into the world of Google Classroom, Meet, or Zoom, teachers all over Romania had to cope with e-learning somehow.
In the present study, I propose to investigate some of the positive and negative aspects of going online, to compare digital language classes involving different age groups (pupils of elementary schools or middle schools vs university students), as well as the diverse social background which influenced online learning to a large extent. I also intend to look at teaching different language skills: is there any relevant change in this respect as opposed to teaching face-to-face?

**Keywords:** e-learning, language learning, digital skills, social background

## An unprecedented situation

At the beginning of 2020, teachers and students all over the world suddenly found themselves in an unprecedented situation: from one week to another, they had to switch to online learning. In May 2020, a UNESCO report showed that worldwide there were around 1.21 billion students who could not return to schools and universities, which made up 69.3% of the student population around the world (Ionescu et al. 2020).

In some countries, computer-supported learning was something that both teachers and students were familiar with, whereas in other parts of the world e-learning came out of the blue, without any special preparation for those involved in it. A UNICEF report from June 2020 pointed out that "only a minority of countries have the basic infrastructure to focus on the pedagogical challenges of online approaches to teaching and learning" (Hosszu–Rughiniş

2020). The sudden shift to online education meant a struggle to participate in digital learning, both for students and teachers in Romania, as many of them had poor user experiences and there was no such training for teachers in this respect. On the other hand, not everybody had access to proper devices, or perhaps the Internet connection was rather poor (Sălceanu 2020). What is more, it turned out we had to face difficulties in the process of learning to use different platforms or various applications, too. Consequently, all teachers needed a longer time to prepare for their classes and correct assignments, while all students spent more time writing their homework or completing their assignments.

## Theoretical background

In general terms, online learning is "education that takes place over the Internet synchronously and/or asynchronously and does not take place in a traditional classroom. It can be in the form of online videos, online learning materials, face-to-face meeting sessions, interactive online questions, quizzes and practices" (Wong 2020: 2). A great number of previous studies have dealt with some of the positive effects of online learning, such as the availability of authentic learning materials (Blake 2013), self-paced and self-directed learning mode (Fotiadou et al. 2017), or the flexibility of time and location for learning (Zhang–Cheng 2012). Others have researched some of the downsides of online learning: lack of immediate feedback (Aguerrebere et al. 2018), supervision from teachers (Farley 2010), learners' feeling of isolation and the lack of solidarity with peers (Koutsoupidou 2014), or "fears with respect to surveillance and control, privacy issues, power relations, and (new) inequalities" (Jarke–Breiter 2019: 1).

However, the above mentioned studies are mostly based on research involving blended learning, which combines face-to-face learning and individual online study of electronically available material. For example, Moorhouse (2020) describes his experience with combining synchronous and asynchronous online learning and teaching. While the first synchronous online sessions were optional, less than 1/3 of the students joined in, and many of them preferred writing in the chat box to actually talking to each other. These online face-to-face meetings were rather teacher-centred presentations of the previously provided online material that students should have read and discussed. Later, when synchronous online sessions became compulsory, and breakout rooms were created for discussions in small groups, students prepared more thoroughly and took responsibility for participating at the discussions (Moorhouse 2020: 2).

As compared to blended learning, exclusively online learning is quite different. What is more, there is a huge difference between choosing online learning of free will and having it imposed on one, as it was the case of students who could not

attend the school because of the pandemic. As Wong explains: "Both teachers and students were ill-prepared to face this unprecedented learning and teaching condition with unpredictable challenges – teachers did not have sufficient training to cope with students' and the teachers' own problems and stresses when teaching and learning could only be facilitated online" (Wong 2020: 14).

Luckily, teachers and students have been provided, mostly free of charge, with many educational platforms and a wide range of sources to meet the requirements of the unexpectedly generalized online education (Williamson et al. 2020: 108). On the other side, there were also companies who benefited a lot from selling different education-related software or other electronically available products or services to teachers or students who desperately needed them in order to be able to carry out their activities on a daily basis. Providing access to the Internet to families with financial difficulties was another type of help education received in a number of countries. Beyond its benefits, this has also been a way for gambling or loan companies to get in touch with these families and market their products (Williamson et al. 2020: 111).

Changing to online mode has not been easy for anyone. It needs us to adapt in many perspectives, as other researchers also point it out:

> Transitioning from offline to online teaching and learning has long been found by its earliest researchers and exponents to be complex, problematic and evolutionary, though it can be done by managing the unrealistic expectations that you will be doing substantially the same thing with time, space and material artefacts as you did in face-to-face teaching. (Williamson et al. 2020: 112)

## A quick look at the situation in Romania

According to data provided by the Romanian Ministry of Education, there were a total of 2,824,594 students enrolled in the last school year (2019/2020) in Romania. An official survey run by the same ministry, which aimed at identifying students who had limited or absolutely no access to online learning, revealed that officially there were around 237,000 students with no Internet connection and further 287,000 students without IT devices.[1] These numbers indicate that around 18.55% of the questioned students had some kind of technical difficulty and could not attend online learning.

1 Information retrieved from: https://www.edupedu.ro/sunt-237-de-mii-de-elevi-care-nu-au-internet-si-287-de-mii-de-elevi-care-nu-au-echipamente-it-anunta-ministrul-educatiei-sunt-mai-multi-elevi-fara-acces-la-educatie-online-decat-arata-recensamantul/ [Last accessed: 1 May 2021].

The data of the research are somewhat questionable, though, I would dare say, since the information collected through the county inspectorates was not accurate enough. Class teachers had only one question to answer: did the families of their students possess any IT device that made e-learning possible: D for desktop, L for laptop, S for smartphone, T for tablet, and N for no device? Thus, the survey did not take into account larger families where several children had access to only one phone in the family. They all appeared as individuals with some access to online education in statistics. A survey carried out by the Romanian Institute for Evaluation and Strategy (IRES) in April 2020 estimated that 36% of the families had two or more children and not enough devices for them to attend online classes (IRES 2020).

On the other hand, the data collected through the inspectorates did not consider the age or performance of the smart gadgets either. Some of the students used desktops that were hardly working or their performance was so poor they could not sustain a platform such as Google Classroom. The survey conducted by IRES estimated that only around 68% of the students had proper equipment for online learning in Romania. The study claims that 76% of the students who were able to take part in online learning were from urban areas, while only 62% from rural areas (IRES 2020).

On top of all the difficulties mentioned so far, the changing rules during the school year did not help anybody in these difficult times. In the first few months of online learning, which covered about the second term of the school year 2019/2020, it turned out to be rather difficult to agree upon basic rules during online classes, as some of the official regulations were missing or appeared later on. Even the ones emerging in the process proved to be controversial decisions of the Ministry of Education. For example, handing in homework or fulfilling tasks was marked as optional, and, eventually, every student got some grade in every subject, even though they did not attend classes, based on their results in the previous semester.

At some point, giving marks or grades to pupils became also questionable, as parents had to agree on the grade their children received. Obviously, there have been misunderstandings between teachers and parents in this respect. Attendance of online activities and marking attendance or active participation turned out to be problematic, too, because of central decisions, while turning on cameras or not using them at all was another controversial issue, difficult to impose due to ministerial decisions. All these decisions hindered real educational development, in my view.

Since the beginning of the pandemic in the first part of 2020, online learning has developed a lot, even in contexts where originally it was considered to work with difficulties. As such, I would say there are at least two distinct stages we can distinguish between: in the first stage, everyone was doing things on the run

and managed as they could. In this stage of e-learning, some of the problems were identified, and also the needs for a short-term development were assessed. The second stage probably started with the fall of 2020, when everyone started school with some previous online experience to build on. During their summer vacation, teachers attended training sessions and became acquainted with different platforms and various applications. Consequently, this second stage began slightly more differently than the previous one.

One of the most important needs identified in the very first stages of online education concerned access to smart devices. Although the Romanian Ministry of Education promised to help financially challenged families by offering them tablets starting from late spring 2020, this did not happen until late autumn. In the meantime, schools tried to ask for help from local authorities, different NGOs or foundations, and some of them managed to equip a number of students with electronic devices. Eventually, the much-talked-about tablets arrived little by little in every part of the country and further improved the situation in this respect.

## Methodology and data collection

In comparing the two stages of e-learning I have identified so far, I wanted to find out pupils' and students' points of view as well. In order to do this, I have used a short questionnaire. I asked my students various questions related to how they had managed to deal with online learning, what difficulties they had encountered on the way, and what advantages, if any, they could name in all this unprecedented educational process. The respondents of this study were my own students at József Attila Primary School in Miercurea Ciuc, where I teach 98 pupils grouped into 5 classes (aged between 9 and 14), as well as my students at Sapientia Hungarian University of Transylvania in Miercurea Ciuc (87 students learning in 7 groups). In both of the institutions, students are native speakers of Hungarian who speak Romanian to some extent and also speak English on different levels (obviously, lower levels at the primary school and higher levels at the university).

One of the most important differences between the two institutions is, obviously, students' age and the peculiarities of the different age groups. With younger pupils, I used easier and fewer questions, and, as expected, their answers were not always relevant since they were able to see only bits of the whole picture when it came to the educational process. As a result, I have built my research mainly on the answers provided by the pupils in middle school and, of course, by university students.

Taking into account the age differences between the various groups of learners involved in the present study (9- and 10-year-old pupils in the youngest group,

11–14-year-old pupils in the middle school, and 19–42 in the university students' group), important differences emerged in organizing online learning as well. As expected, older learners turned out to be more independent, while many of the 9-10-year-old pupils needed help from their family members in order to attend classes or turn in assignments.

Data was collected in Hungarian in the case of both institutions. The translations of students' responses from Hungarian into English are my own throughout the article.

## Describing the data

At the university, we have been learning online for more than a year now. When the first lockdown was announced in Romania (middle of March 2020), we went online and started using the Google suite: Google Classroom, Meet, and Jamboard. It was a very swift and difficult switch for everyone at that point. However, we all got used to e-learning in a few months, got acquainted with the platform we all had agreed to use, gained some experience using other applications as well, and things have been going more and more smoothly since then. The students' opinion is reflected in the excerpts reproduced below.

> I think we all adapted well to the emerging situation. We advanced with the seminar material at the regular speed, and classes were interactive.

> In my opinion, in English, materials and tools were easier to adapt to online learning than other subjects. In the online context, English classes continue to be centred around communication […] I think this is why everything went smoothly.

In primary and middle school, moving online did not go so well. First of all, pupils did not have email addresses, and creating them implied parental agreement and paperwork, which was not at all regulated by the Romanian Ministry of Education at that point. So, in the first period of the supposedly online learning, teachers were sending different materials and worksheets to parents via Messenger groups or emails and did not have contact with their students on a daily basis. In some cases, we had to prepare take-home packages for younger students, as we could not reach them online. As expected, it was really difficult to follow if they had fulfilled the tasks or not.

There was a major difference when it came to attendance, as well. Attendance noticeably improved at the university – even students who had a job went through the tasks, and some of them even attended the online classes while working.

However, at the school, there were quite a lot of students who could not participate in online learning. I did not manage to keep in contact with about 40% of the pupils on primary level and 18% of the pupils in middle schools. These pupils would have come to school on a daily basis under normal conditions. But having no access to technology did not allow them to do the same from their homes. At the university, around 6% of the students could not attend courses and seminars.

**Table 1.** *Number of students actively/inactively attending classes*

| Type of school | No. of students taught | Not attending (early stages) | Inactively attending (2020/2021) |
|---|---|---|---|
| Primary school | 37 | 15 | 9 |
| Middle school | 61 | 11 | 9 |
| University | 87 | 5 | 3 |

If we look at the reasons why these students did not attend classes, one of the most frequent reasons was the lack of proper devices (phones, tablets, laptops, PCs) or of Internet connection in their homes. As already mentioned, schools asked for help in terms of equipping their students with proper devices, and, luckily, their requests were met in some of the cases. While waiting for tablets promised by the Romanian Ministry of Education in the spring of 2020, many students received smart devices from the start of the subsequent school year from other sources: some of them from local authorities,[2] others from different NGOs and foundations (as in the case of our school).

> I usually join online classes using my mother's phone because my brother uses the laptop.

> My brother got a tablet from the school, but he cannot use it all the time. It keeps freezing.

Even though students had different smart gadgets, certain devices turned out to be unfit for e-learning, as they did not allow students to access different platforms or various formats. One of my students reported the following:

> Sometimes during English classes, the audio recordings keep interrupting, and it is really difficult to understand what they are talking about. I can't even watch the videos because my device wouldn't play those files. The only solution is to watch them on my sister's laptop, but she rarely gives me access to it.

2 Data based on information published in the local press. See: https://sfantugheorgheinfo.ro/stiri/news-5458 [Last accessed: 1 May 2021].

Some of the difficulties in using different platforms or apps had to be bridged during online classes – for example, sending back assignments through Google Classroom required some practice in every group or class. While it went more smoothly with university students, where a tutorial did the job, it was much more difficult in the primary grades, where the teacher had to demonstrate the various steps several times to their pupils, and still there were problems with attaching files or turning them in. Younger students necessitated parental supervision in order to work online, which, again, was difficult as the parents had jobs and were not able to stay at home all the time.

On the other hand, when everybody went online, the quality of the connection dropped, the Internet connection kept interrupting or was rather poor. In many cases, it was difficult to hear what somebody was saying because of background noises, while in other cases presentations froze and videos or audio material proved impossible to watch or listen to. These problems can be traced in students' testimonials as well, as illustrated below.

> The Internet connection also fluctuates quite often; sometimes I am thrown out of classes, and I have to rejoin them. In such cases, I tend to get left behind, and it is difficult to catch up with things again.

> Explanation is not that clear during online classes. Sometimes there are interruptions in the Internet connection, so I don't understand everything exactly, and I have to ask questions all the time.

Obviously, online learning implied much longer time spent in front of the screen, at least in the first stages of working online. Not only teachers but students as well complained about that.

> We sit 5-6 hours doing online classes, then in the afternoon another 3-4 hours doing homework. We spend quite a lot of time in front of our devices.

> When we actually go to school, we go out in the yard and play football in the breaks between classes. With online learning, we don't have that. We only get up for a short time from the computer; we spend the whole day sitting in front of our gadgets.

What is more, younger students were not really used to being online, so quite often they focused on issues which were not really part of online classes, such as showing their pets or favourite toys to each other or teasing each other about their looks or backgrounds.

Another side of online learning to be addressed was concentrating on the task. Sometimes it was difficult to follow if students really focused on what was happening in the class or they were doing something else, such as playing online games while attending classes or chatting all the time, etc.

> Sometimes it is difficult to pay attention because my sister is in the other room, and I can hear what is happening in their classes.

> I cannot pay enough attention, sometimes my thoughts are elsewhere, and sometimes I do other things too during online classes. There are times when my classmates write messages and I pay attention to that rather than to the teacher. For me, it is more difficult to pay attention at home than at school.

> The teacher is always asking me something when I am not exactly paying attention to the explanation. Then I can't really follow what we are doing in class. Sometimes it is really embarrassing.

We, as teachers, had to keep ourselves off multitasking during classes, as we experienced that multitasking requires a lot more energy and leads to less effective activities. Simple checks of emails or social media accounts were actions that I sometimes performed while my students were reading the text or solving an exercise on their own. In the first stages of online learning, I thought it was important to keep an eye on official communications or messages from the school, as things were changing suddenly. However, I had to be extra careful so that I was not engrossed in reading them but focus on the activities going on during the online class. Obviously, I had to admit that it was not worth doing several things at the same time, as I was unable to fully concentrate on any of the activities I was trying to perform.

Enlisting further problems in online learning, I have to say that, surprisingly, attendance in online activities and marking attendance or active participation turned out to be problematic in primary and middle school because of central decisions. No such thing emerged at the university level, as all these things were regulated and applied right from the first few days of going online. Having clear rules helped teachers and students alike in organizing all learning activities. Of course, students' age represents an important factor as well, since older students are more independent, so they are more likely to take more responsibility for their own learning.

> I think it was great that the university decided on having online classes, especially in the case of learning English. The teacher had some simple,

> practical rules for the online English seminars. So, it was easy to follow what her expectations were related to the online activity, homework, or the tests and exams. I had a nice time attending the interactive classes.

Turning towards the positive aspects of e-learning, the most prominent one is a kind of reform imposed on the public education system, whether we like it or not. Since last spring, teachers and students have been pushed to develop their digital skills, to discover free platforms and educational resources and a variety of learning styles available. What is more, online learning gives students the opportunity to take responsibility for their own learning process and to learn at their own pace. In my opinion, these elements represent huge steps taken towards autonomous learning, and some of the positive aspects might be used in offline learning as well.

Another positive aspect, experienced both by teachers and students, was less time spent getting ready for school. Undoubtedly, there was some time saved in the morning or in the afternoon, as we did not have to actually walk or travel to school, only to turn on our devices and join the online class. This aspect was also mentioned in students' testimonials, as illustrated below.

> We don't waste time walking to school, especially since I commute from a village.

> I can sleep longer because I don't need to get up so early.

> You don't need to dress and you don't need extra time to get to school.

> I can attend classes in pyjamas; I can have breakfast during the first class.

Beyond their time-efficient aspect, getting up later in the morning than usual or having breakfast during the first online class had a negative impact, too. During the first class, students were a lot sleepier, some of them could not concentrate enough or simply had to swallow their food before answering the question, as they had got up just a few minutes before the classes started and had no time to perform their usual morning rituals.

## Data on the online ELT classroom

If we compare some of the problems encountered during online language classes with those that occurred during other online activities, we can state that several of the problems are general, rather than specific for language classrooms, or for

English classes in particular. In what follows, we will have a look at the advantages and disadvantages of language learning in the online context, focusing on the four different skills to develop during online classes: reading and writing, listening and speaking.

Unexpectedly, reading proved to be more difficult when not using paper-based books. Luckily, most elementary and middle school pupils took their school books home, so we used those in online classes as well. Interactive books could not be accessed by a number of pupils because of their format. Yet, university students did not have access to books, as these got stuck on the shelves of the library. Thus, we had to resort to other solutions. Getting access to electronic books was not an easy task either, as going online happened from one day to another; there was hardly any time to prepare the material for online classes. Eventually, we agreed on uploading screenshots of smaller units of texts onto the learning platform so that students could read them using smaller devices.

The greatest problem with writing tasks was that writing longer text on a smartphone is rather difficult. Consequently, this type of task implied a lot of typos and spelling mistakes. The majority of university students checked their spelling using their gadgets; however, younger students did not manage to do the same. Obviously, all students liked more the tasks that did not imply a lot of actual writing. Younger students received their tasks in several formats, so they could work more easily on smartphones, too. Usually, as homework, they would have to write on the picture with the task, which had been thoroughly discussed during the online class, then save it and turn it in. Yet, sometimes they forgot to save them and turned in the empty document, as illustrated by the student testimonials presented below.

> With online classes, English homework is easier because we always get some task that we have already solved orally during the online activity. If you pay attention, it is easy. You only have to write it down.

> The first time I wanted to hand in my homework online, I forgot to attach the document, so I actually turned in an empty assignment. The teacher wrote me a message and sent me a short video about how to turn in the assignment correctly. From then on, I had no problems.

When practising listening skills, other types of problems occurred. As already mentioned, video data was difficult to handle since not all formats were accessible to the students. Thus, resorting to pre-recorded classes was out of the question in elementary and middle school. On the other hand, in the case of university students, the listening material proved difficult to obtain, as there were only two sets of CDs available at the university and several teachers who would have to use

them. Fortunately, some of the listening material was available online for a short while. In the meantime, we managed to get access to the electronic version of the audio material. Of course, sometimes interruptions of the Internet connection hindered comprehension, but we all learnt to live with that.

Speaking went smoother than expected. Most of the online activities were built on verbal communication, which students of all levels liked. However, working in pairs or small groups was a problem in the online classroom, especially with younger learners, as they got bored very easily while their peers were talking, and they also needed to be checked on more often. So, forming small groups (e.g. using breakout rooms) proved rather difficult with younger students.

Looking at the bright side of things in ELT, one of the advantages mentioned by several students was practising everyday conversations more often during online English classes. Asking each other questions, inquiring about each other's mood or the activities performed were not exactly realistic at school. Not sharing the same space and not being in connection all the time made them realistic. So, asking a simple question such as "How are you?" or "What did you do yesterday?" became important in the online context.

> In the online context, English classes continue to be centred around communication […] I think this is why everything went smoothly.

> I like that before every class the teacher asks all of us how we are.

> I like English classes because we speak a lot. Those who are interested pay attention, those who are not, don't.

The greatest advantage I experienced as a teacher is that in online classes there are a lot more possibilities for differentiating. Students might receive different tasks or different texts to read, they might be assessed using various ways, based on their level of English within the group. In a face-to-face classroom assigning, differentiated tasks might have taken up much more time. In an online context, preparation of differentiated tasks might take longer, yet students are not even aware of getting a different task or a different assignment for homework, as they only see their own tasks and assignments. What is more, in the online classroom, students can learn at their own pace, going back and re-reading, skipping certain bits, or accelerating when needed. This is especially true about assignments that are to be prepared for a later meeting.

Another thing I have noticed during online classes, especially in the first stages of online learning, was real collaboration between the learners. Students helped out each other by sharing their screen and showing each other where to look for messages or assignments, how to check the tasks and their deadlines or how to

turn in assignments. Since we could not find any useful tutorial in Hungarian, suitable for younger learners (at least in the early stages of online learning), collaborative learning proved to be very useful in this respect. Furthermore, students learned faster from one another.

Self-assessment has become more important, it seems. Many students liked the idea of exercises solved through interactive worksheets. Thus, they could check themselves, look for mistakes, possibly correct them and prepare for upcoming tests very easily. On the other hand, with online assessment, tests proved less efficient, as students themselves admitted. Since supervision was not really possible in an online context, some of the students might have cheated on these tests.

> When we have tests, then I get to have the laptop so that I can see the tasks better and type in the answers more quickly.
>
> You really have to be careful about time because if you spend too much time looking for words in your book, you can't finish all the tasks.
>
> Tests are easier online because if you don't know something, you can check it in your notebook or in the book. Of course, this is cheating a bit, but everybody does that.

Online testing brought forth a series of further issues, such as getting acquainted with different platforms used for testing before actually applying the tests or the question related to making the test results available to parents, yet adhering to the rules imposed by the GDPR.[3] Moreover, English teachers had to pay special attention to choosing the proper way for testing their students. Although designed in English, these tests may be easily translated into other languages. Such a case is reported by one of the middle school students, who received the English test in Hungarian since his laptop was set to translate everything into Hungarian (the student's mother tongue): "At our first English test, I got really scared because everything appeared in Hungarian on my screen and I didn't know how to set it back to English. Then the teacher helped me fix it."

Obviously, there have been certain differences in developing the four different language skills during online classes, but having more than a year of experience behind all of us, many of the problems that occurred in the first phase of online learning were solved or could be handled by both teachers and students. Positive changes, on the other hand, might be here to stay if we are smart enough to use them in face-to-face learning as well.

3 For more information on the General Data Protection Regulation, see: https://gdpr-info.eu/ [Last accessed: 1 May 2021].

## Instead of conclusions

Summing up, on the negative side, I can affirm that teachers and students alike have spent too much time in front of their intelligent gadgets. Consequently, especially younger students might have had problems with organizing their daily schedule and clearly differentiating between learning time, play time, or meal time, as all these activities could have overlapped at home; moreover, they took place in about the same space. Due to the prolonged online learning process, other health issues might appear as well, for example, backaches, sore eyes, Internet addiction, or psychological problems due to lack of socializing. So, going back to school might be a little different than during the times before the pandemic.

Until physically going back to school becomes possible, we need to improve in many aspects regarding e-learning. First of all, students should be offered equal chances for learning, whether it is online or offline. Social differences, for example, should not hinder learners to such a great extent. Secondly, teachers should be offered special courses for improving their IT skills, but also updating their teaching styles and adapting them to online conditions.

On the positive side, we must acknowledge that our digital skills have developed considerably, and this is essential nowadays. It has not been an easy process, yet teachers and students have become acquainted with using different educational resources and free platforms for learning, also tutorials and free online courses to help them in their online endeavours. Whether it is inviting e-guests to language classes, differentiating by computer-assisted tasks, or accessing interactive worksheets for self-practice, many elements of e-learning could be used in face-to-face learning in the future. We should stick to our guns when it comes to maintaining some of the positive changes that occurred during the pandemic.

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# Changes in the Classroom Discourse: Negative Politeness and Impoliteness

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**Abstract.** The paper focuses on changes identified in the classroom discourse in terms of the teacher–student relations. While traditional classroom relations relied on teacher's authority and control in the classroom, the current situation indicates a shift in the power relations existing in the class. The paper aims to analyse some of these changes by studying politeness and ways of expressing negative politeness and impoliteness. It starts by defining politeness as conflict-free communication, and then moves to negative politeness and impoliteness, applying these two concepts in the interpretation of the classroom discourse. The data used for the analysis were collected during English and history classes in a high school in Romania.
The paper draws on Penelope Brown and Stephen Levinson's (1987 [1978]) concept of negative politeness and on Derek Bousfield's (2008) impoliteness theory. The data reveal that the most common negative politeness strategies in the classroom discourse use indirect speech acts, questions and hedges, minimizing the imposition and impersonalizing. I argue that while teachers use mainly politeness strategies, students use impoliteness strategies as a way of claiming power. Thus, they can be disruptive and show lack of interest; they interrupt or take the floor at a wrong time; they sometimes dismiss, contest, or refuse the teacher's indications and often challenge the teacher's authority; at times, they are also rude towards their own peers in trying to demonstrate their superiority.

**Keywords:** classroom discourse, negative politeness, impoliteness, power relations

## 1. Introduction

Politeness is a very complex concept, which can be defined in different ways. It can refer to polite behaviour or to polite language. Being polite represents the key to good communication in society. The origin of the word *politeness* comes from the Latin word *politus*, which meant *polished*; hence the association of politeness

with civilized, "polished" behaviour. The present paper deals with linguistic politeness, which can be defined, in broad terms, as conflict-free communication.

## 2. Theoretical framework

### 2.1. Politeness theory

One of the most well-known and influential theories of politeness belongs to Penelope Brown and Stephen Levinson (1987 [1978]). Their theory is often referred to as "the face-saving theory of politeness", as it builds on Erving Goffman's (1955) notion of *face*. They define the concept of face as "the public self-image somebody claims [adding that it] is something that is emotionally invested, and that can be lost, maintained, or enhanced, and must be constantly attended to in interaction" (Brown–Levinson 1987: 61).

People can be expected to defend their faces if threatened in interaction, and, in defending their own, they might threaten others' faces. Normally, it is in every participant's best interest to maintain each other's face. While the content of face varies according to different cultures, Brown and Levinson assume that the mutual knowledge of members' public self-image – or face – is universal. The aspects of face have been treated in terms of basic wants – every member knowing what every other member desires. More explicitly, "the want of every 'competent adult member' that his action be unimpeded by others [has been defined as negative face and] the want of every member that his wants be desirable to at least some others [has been defined as positive face]" (Brown–Levinson 1987: 62). "Positive politeness is redress directed to the addressee's positive face, […] his desire that his wants […] should be thought of as desirable" (Brown–Levinson 1987: 101). Redress consists in communicating that one's own wants are somehow similar to the addressee's wants, which is the normal behaviour between intimates. Positive politeness utterances are used to imply common ground even between strangers. Brown and Levinson state that positive politeness involves a degree of exaggeration and represents a kind of "social accelerator" (1987: 103). The strategies of positive politeness involve three main mechanisms: claim common ground with the hearer, convey that the speaker and the hearer are co-operators, and fulfil the hearer's want.

> Negative politeness is redressive action addressed to the addressee's negative face: his want to have his freedom of action unhindered and his attention unimpeded. It is the heart of respect behaviour, just as positive politeness is 'the kernel' of familiar and joking behaviour […] Where positive politeness is free-ranging, negative politeness is specific and focused. (Brown–Levinson 1987: 129)

Whereas the desire to go on record points towards directness, the need for negative face redress points towards indirectness. These two conflicting desires led Brown and Levinson to find ten negative politeness strategies: be conventionally indirect, question and hedge, be pessimistic, minimize the imposition, give deference, apologize, impersonalize the speaker and the hearer, state the face-threatening act (FTA) as a general rule, nominalize – using nouns instead of verbs, go on record as incurring a debt, or as not indebting the hearer. Some of these strategies are identified in the data analysis section.

While positive politeness strategies intend to minimize social distance, negative politeness strategies tend to maximize it. Thus, politeness has the power to reveal the quality of social relationships. "The linguistic realizations of positive- and negative-politeness strategies may operate as a social accelerator and a social brake, respectively, to modify the direction of the interaction at any point in time. Interactants […] move the interaction in the desired direction towards greater closeness or greater distance" (Brown–Levinson 1987: 231).

Brown and Levinson's theory has had a great impact on researching politeness, but it has also received many critiques throughout the years. One of these critiques is the theory's overreliance on the Speech Act Theory. Some speech acts can be misleading; they may appear polite on the surface, but they can have impolite implications at a deeper level. Context is extremely important in interpreting politeness, and Brown and Levinson seem to neglect this aspect; they analyse politeness at the utterance level. Furthermore, their model of communication is debatable because communication between the speaker and the hearer is not perfect; in real-life communication, there could be misunderstandings. Speakers and their utterances receive greater attention than hearers do. Other critics sustain that even the definition of politeness and the understanding of the role and function of its variables are biased towards the Western culture. Politeness phenomena are more complex than simply avoiding threatening the other's face. Brown and Levinson do not take impolite phenomena into consideration. Their assumption about the universal nature of politeness poses some problems, as well. Linguists believe that, within different cultures, politeness operates in different ways and the concept of face varies across cultures (Mills 2011: 20–26). The post-modern/discursive approaches to politeness that have emerged afterwards try either to modify or to build on Brown and Levinson's theory.

## 2.2. Impoliteness theory

Derek Bousfield (2008) provides a descriptive, data-driven model concerning impoliteness, in which "face is mutually constructed" – externally constituted in interaction and internally expected. When the internal face expectations do not match the reality face ones, then impoliteness may arise (Bousfield 2008:

40–41). Successful impoliteness occurs when the speaker's intention to offend is understood by the hearer. Bousfield defines impoliteness as:

> the communication of intentionally gratuitous and conflictive verbal face-threatening acts (FTAs) which are purposefully delivered:
> i. Unmitigated, in contexts where mitigation is required, and/or
> ii. With deliberate *aggression*, that is, with the face threat exacerbated, "boosted", or maximised in some way to heighten the face damage inflicted. (2008: 72; emphasis in the original)

Starting from Jonathan Culpeper's (1996) model of impoliteness, Bousfield suggests his own new model of analysing impoliteness. He proposes two "overarching tactics", namely on-record impoliteness and off-record impoliteness (including sarcasm and withholding politeness) (Bousfield 2008: 94). On-record impoliteness involves:

> [t]he use of strategies designed to *explicitly* (a) attack the face of an interactant, (b) construct the face of the interactant in a non-harmonious or outright conflictive way, (c) deny the expected face wants, needs, or rights of the interactant, or some combination thereof. The attack is made in an unambiguous way given the context in which it occurs. [Whereas off-record impoliteness involves] [t]he use of strategies where the threat or damage to an interactant's face is conveyed indirectly by way of an implicature […] and can be cancelled […], given the context in which it occurs. (Bousfield 2008: 95; emphasis in the original)

Bousfield exemplifies several types of impolite strategies: snub – showing disapproval; disassociate from the other; be uninterested, unconcerned, unsympathetic; use inappropriate identity markers; seek disagreement; use taboo words; threaten/frighten; condescend, scorn, or ridicule; explicitly associate the other with a negative aspect; criticize; hinder/block (interrupting, turn denial); enforce role shift; challenges (rhetorical questions used as a defence) (2008: 101–118). Some of these strategies are identified in the data analysis section.

Bousfield states that impoliteness does not appear "out of the blue", it must have been previously invoked, and the impolite participant must have been sufficiently provoked before resorting to an impolite strategy (2008: 183). Once faced with an offending event, the interlocutor has the possibility to respond or to remain silent. Interpretation of silence can be problematic because it may denote different things: it can be a way of defending one's face, accepting the offence, it can show lack of understanding or even need of thinking time. If, on the contrary,

the interlocutor chooses to respond, he/she can accept the face attack or counter it using offensive or defensive strategies.

### 2.3. Politeness and impoliteness in classroom interaction

There are many studies that focus on the politeness strategies used in classroom interaction. Peng et al. (2014) observe that the use of politeness strategies minimizes the social distance between the teacher and the students and also creates a relaxing learning environment. They identify two main positive politeness strategies used by the teacher: the address and the compliment. The teacher addresses the students using honorifics (such as *miss* or *gentleman*) in order to "establish an equal teacher–student status" and compliments or praises (such as *well done*, *excellent*) in order to increase students' confidence (Peng et al. 2014: 113). Teachers also use hedges and questions – as negative politeness strategies – to minimize the imposition and give students more freedom of choice. Peng et al. (2014) conclude that teachers use more positive than negative politeness strategies, demonstrating their intention to reduce the face-threatening acts and shorten the social distance (p. 114). Senowarsito (2013) focuses on students' politeness strategies, among which he mentions the use of interpersonal function markers. He sustains that teachers and students use positive (group identity markers, code-switching, joking), negative (hedging), but also bald on-record politeness strategies (direct speech acts) and that the linguistic expressions of politeness in classroom interaction are addressing, thanking, apologizing, encouraging, and leave-taking (Senowarsito 2013: 94). According to him, politeness represents "an important aspect of student character building" (Senowarsito 2013: 95). In recent years, the interest in analysing impoliteness has also increased. Among the impoliteness strategies identified in classroom interaction, we mention asking to be quiet, criticizing, using taboo words, and being silent (Maulana et al. 2019).

## 3. Research design

### 3.1. Research questions

The research was guided by two main questions:

What negative politeness strategies are employed in classroom discourse?

What impoliteness strategies are employed in classroom discourse?

### 3.2. Data collection

This research is based on the analysis of the recordings of three 50-minute lessons in a Romanian school. There is one history lesson taught to the 5th grade about the beginning of the Roman Empire and two English lessons to the 11th grade, which are my own. The English classes are two consecutive ones: the first one starts with consolidation regarding colour metaphors, and then it continues with a speaking activity about how to make joint decisions when choosing the colour and the furniture in a student common room; the second lesson deals with teaching new grammar (*needs doing/have something done* structure) and practising it.

The classes were audio recorded using a mobile phone connected to a high-quality microphone. I was present at the history lesson (in my researcher capacity) at the request of the teacher who thought she would not manage the equipment. To prevent distraction, curiosity, or even nervousness among the students, I sat at the back of the classroom lest the students should see me or the microphone. Being an observer allowed me to write down some remarks and other significant details for the future transcription. I also talked to the history teacher after the lesson, and she provided me with further insights into her teaching. These recordings are the data that provided the basis of my analysis.

### 3.3. Transcription conventions

After recording it, the material was transcribed and translated from Romanian into English (in the case of the history class and also in the English classes when Romanian was used). The conventions used in the transcription (see the *Appendix*) are based on several sources from the literature (Eggins–Slade 1997, qtd. in Coposescu–Chefneux 2008: 17).

### 3.4. Participants

Being a researcher and a teacher involved in the research represents an advantage because I can analyse and interpret my own linguistic performance from a first-order politeness perspective. I have been teaching English for nine years at all levels – primary, secondary, and high school. To provide validity and reliability to my study, I have asked another female history teacher to record her class. She is in her forties, and she has a teaching experience of more than ten years. The students who participated are: 19 students from the fifth grade (11–12 years old) and 22 students from the eleventh grade (16–17 years old). All the students and the teachers are Romanian. In the English class, the students' level of English varies from lower intermediate to advanced.

### 3.5. Ethical considerations

The research had to meet a number of stringent ethical requirements, among which the approval of *The Committee for Ethics in Social and Human Research of Transilvania University of Braşov*. I also obtained all the participants' written consent. I explained to the headmaster and the teacher the purpose of my study, and I guaranteed confidentiality. The parents' consent was also asked for because the students were under the age of eighteen. There were three students from the 11th grade whose parents did not want their children involved in the study. I deliberately omitted transcribing these students' replies. To protect the other students' identities, their real names were not used in the transcriptions. All participants were informed that they could withdraw from the research whenever they wanted and that their participation was not conditioned by any kind of benefits and/or costs.

## 4. Data analysis

The main purpose of this research is to identify strategies of negative politeness and impoliteness occurring in classroom interaction. I have analysed the data based on Penelope Brown and Stephen Levinson's (1987 [1978]) and Derek Bousfield's (2008) approaches because their works provide two of the most thorough models of linguistic politeness and impoliteness. I have adapted their theories to the data. I start by presenting some negative politeness strategies identified in classroom interaction, followed by the impoliteness strategies.

### 4.1. Negative politeness strategies

#### *4.1.1. Being conventionally indirect*

Indirectness appears more frequently in the EFL class and less often in the history class. The history teacher addresses the students more directly, in a more authoritative manner. She controls the students, keeps them alert all the time by asking them questions. During the English class, the teacher tries to make students feel they are in charge of their own learning. An important factor in adopting this attitude is the students' age; they are teenagers, and it is important for them to develop learning autonomy. The teacher tries to be polite so that students perceive no threat to their face, to their self-esteem, as in the following examples:

(1) Can you translate this?
(2) Can you come to the board (.) PLEASE?
(3) You can write this down as well.

Examples (1) and (2) illustrate indirect requests, not just simple questions regarding the students' abilities. The modal verb "can" and the insertion of the polite marker "please" are used to soften the request and not to damage the student's face. In example (3), we can see how the teacher avoids being too direct and instead of using an imperative (Write this down!) she resorts to a declarative sentence containing the same modal verb. It leaves students the impression that writing down certain information is a matter of choice.

### *4.1.2. Using questions and hedges*

The teacher avoids being direct or appearing too authoritative by asking questions and/or using hedges in her speech. For instance, questioning instead of ordering seems less imposing on the students. In the following two examples, the teacher prefers to give students the opportunity to affirm themselves, to let them take control instead of directly nominating them.

(4) Who can help him?
(5) WHO would like to read the task?

The question in example (4) is asked when a student does not know the answer. Instead of criticizing the student for his lack of knowledge and thus making him lose face in front of his classmates, the teacher tries to be supportive and encourages the other students to help him. The teacher does not name a certain student to help him but lets the students decide who is willing to do that. Example (5) is similar to the previous one in the sense that the teacher, once again, avoids straightforward nomination by resorting to a question addressed to the whole class, allowing the students to decide whether they are willing to read the task or not.

Hedging, on the other hand, is achieved in various ways – using discourse markers (such as "well", "so" and their Romanian equivalents *bun*, *aşa*, *deci*), modal verbs (such as "can"), adverbs ("maybe"/*probabil*, "not necessarily"), if-clauses, etc. Example (6) illustrates how the teacher answers when a student volunteers to clean the blackboard. In order not to sound too demanding, the teacher hedges her request with the modal verb 'can' and with the if-clause.

(6) Yes (.) you can clean it (.) if you want.

Example (7) begins with another indirect request: the teacher asks the student to construct a sentence (with a certain word or phrase). The student hesitates because he is not sure if he can use the same word – "hair" – as in the example in the coursebook. The teacher's second reply represents an alternative way of correcting the student without being too intrusive. She uses hedges ("not

necessarily", "maybe"), provides other options (see the enumeration "shirt, trousers, shoes"), and allows the student to decide ("anything you like") in order not to damage his face.

(7) T: can you build another sentence?
S: a:: with hair or with (.) something else?
T: not necessarily with hair (.) maybe with shirt. trousers. shoes (.) anything you like.

### *4.1.3. Minimizing the imposition*

This is one of the most frequently used negative politeness strategies in the classroom. Teachers resort to this strategy lest the students should feel threatened. Diminutives (such as "a little", "a bit", "a few", "a couple", etc.) are used in order to diminish the imposition. See the following examples:

(8) *Haideți să recapitulăm puțin.*
'Let's revise a little.'[1]
(9) *Hai să scriem câteva idei.*
'Let's write down a few ideas.'

(10) Let's write a couple of things.
(11) Ok. so (.) these are a few words about this kind of constructions.

The above examples show how the instructions for these two classroom activities – revising and writing – are given in a mitigated manner. A short revision and some note taking convey the idea that the lesson is not a difficult one. In other words, the students do not feel threatened with a lot of hard work. When minimizing the imposition, teachers take into consideration the students' needs and wants.

### *4.1.4. Giving deference*

This is a strategy mostly employed by students to show respect to the teacher. When addressing the teacher, students use terms such as 'madam' *doamna* or "teacher". These forms of address also reveal the legitimate power teachers are endowed with. According to the data, when students speak in English they use the appellative 'teacher' pointing to the professional status (example 12), whereas in Romanian they use the word *doamna* 'madam' probably considering the age difference (example 13).

1 Translations from Romanian to English are my own throughout the text.

(12) Teacher, mend means to repair?
(13) *Doamna, ce scrie acolo?*
'Madam, what have you written there?'

In example (13), a student in the English class asks the teacher for clarification about what she did not understand from the blackboard. Although the student resorts to code-switching and interrupts the teacher while she is explaining new information, her action is not perceived as an impolite one. A possible explanation could be the student's respectful intervention, which includes the polite addressing term "madam".

### *4.1.5. Impersonalizing*

This strategy is mainly used by the teacher in order to avoid being too direct and personal. According to the data, there are two ways of impersonalizing, namely using imperatives and indefinites.

(14) Write there. please.
(15) Now. Please write the following.

The commands in examples (14) and (15) are addressed by the teacher to the whole class, not directed towards a certain student. They are further softened by the use of the politeness marker 'please', which diminishes the force of the directive and makes the students not feel threatened. In examples (16) and (17), we can see the replacement of the personal pronouns "I" and "you" with the indefinite pronoun "anyone". The teacher is inviting the students to take the floor, but she does so in a polite manner, not threatening their face. Avoiding the use of the second person personal pronouns and replacing them with third person pronouns deepens the social distance between the teacher – the powerful participant – and the students – the less powerful ones.

(16) Is there ANYONE who would like to speak?
(17) Is there anyone else who:: would like to discuss about this?

### *4.1.6. Go on record as implicating a debt*

There are some instances in the data that refer to giving thanks. When thanking someone you imply that you are in debt to that person, suggesting that somehow you will remember what the other person did for you.

(18) Ok. thank you (2) good. another example.
(19) *Mulțumim, X.*
'We thank you, X.'

Example (18) presents the teacher thanking the student who has just provided a good answer. The teacher is thankful to the student because the student volunteered to answer when the other ones did not. Moreover, the teacher may appreciate more a good answer after a series of wrong answers. Example (19) is a similar one, but this time the teacher gives thanks in the name of the whole class. The teachers' thanks are interpreted as denoting gratitude for students' cooperating in the learning process but also as maintaining social distance.

## 4.2. Impoliteness strategies

Impoliteness does not appear as frequently as politeness in classroom interaction. This could be a proof that classroom discourse follows some unwritten rules of mutual respect between teachers and students. It is common sense that teachers and students should be polite to each other as all of them have the same goal – improving students' knowledge and skills. However, isolated cases of impolite behaviour may be encountered in the classroom. From the data analysis, teachers tend to avoid being impolite, and when they are, this behaviour appears to be triggered by the students' disruptive/impolite behaviour. Teachers are not gratuitously impolite and their face-threatening acts are usually a reaction to students' impoliteness. On the other hand, students tend to behave more impolitely towards their teachers probably because they need to assert their identities, to gain power, and to show off in front of their peers. In the following section, I provide some examples of what I interpret as impoliteness in the data.

### *4.2.1. Interrupting and speaking simultaneously*

The history class is a traditional lesson that provides new information; it starts with a brief revision of previous knowledge, then introduces the new information and ends with a feedback session aiming at consolidating the recently taught notions. Throughout the lesson, the teacher asks students questions following the typical IRF pattern (initiation–response–feedback). The teacher does most of the talking, and some students interrupt very often so that they can draw attention, show off in front of their peers, and challenge the teacher. These are 12 years-old students, and they usually do not stay quiet and focused for a longer period of time; they do not have enough patience to let the teacher finish an idea, so simultaneous speaking also appears.

(20) T: *şi hai să le aşezăm aşa frumos ca să aveți loc şi în paranteze să a: /scriem/ câteva completări, da? (3) imperator. IM-PE-RA-TOR.*
S1: */scriem?/*
S2: *şi în paranteză?*
T: ***imediat. STAI că ți le zic.***

T: 'and let's put them nicely for you to have space and in brackets to a: /write/ further information, ok? (3) imperator. IM-PE-RA-TOR.'
S1: '/do we write?/'
S2: 'and in brackets?'
T: '**WAIT. I'll tell you right away.**'

(21) T: *la Roma au început să se construiască foarte multe temple. închinate zeilor. temple închinate zeilor (5) băi publice. băi publice.*
S: *adică cum?*
T: ***explic imediat.*** *biblioteci. etc (3) am înțeles ideea da? şi acum le luăm pe rând.*

T: 'in Rome there were built a lot of temples. dedicated to gods. temples dedicated to gods (5) public baths. public baths.'
S: 'meaning?'
T: '**I'll explain right away.** libraries. etc. (3) we have understood the idea right? and now we take them one by one.'

The above extracts are examples of students' interrupting the teacher's presentation. Students appear to have no patience for the teacher to finish her idea. These examples are similar in the sense that after the interruption the teacher promises to explain later (see the replies in bold). Although the students seem involved in the lesson and their questions seek further explanations, their interventions in taking the floor are inappropriate and are sanctioned by the teacher. When a speaker does not wait for his/her turn at a transition relevance place (TPR), he/she interrupts or speaks simultaneously with the current speaker. Such conversational behaviour is considered impolite, especially in formal contexts such as the classroom. Apart from interruptions, the students in the history lesson also produce overlapping speech – either with the teacher or with other students. There is one particular student who has developed his own way of interrupting, i.e. by repeating keywords the teacher says or sometimes only the last syllables of those words.

(22) T: *supranumele de AU-GUS-/TUS/*
S1: */tus/*

T: *şi hai să vedem ce înseamnă? PREAmăritul (4) a:: să ştiți că acest supranume de Augustus face trimitere la luna au/gust/ (.) luna în care Octavian era născut* /(2)/
S1: */gust/*
S2: */şi eu/*
T: *şi: vorbeam (.) a:: când am pus în discuție calendarul lui? Iulius /Cezar./*
*S1: /Cezar./*
T: *şi vă spuneam. CÂND începea anul la romani? odată cu luna martie.*
S2: *da?*
T: *DA. şi fiecare lună era închinată câte unui zeu (3) o să învățăm şi exemple de zeități pentru că romanii au fost politeişti. adică au crezut în mai mulți zei.*

T: 'the name of AU-GUS-/TUS/'
S1: '/tus/'
T: 'and let's see what does it mean? the VENErated (4) a:: you have to know this title of Augustus refers to Au/gust/ (.) the month in which Octavian was born /(2)/'
S1: '/gust/'
S2: '/me too/'
T: 'a:nd we were discussing about this (.) a:: when we mentioned the calendar of? Julius /Caesar./'
S1: '/Caesar./'
T: 'and I told you. WHEN did the year begin for the Romans? starting with March.'
S2: 'really?'
T: 'YES. and each month was dedicated to a god (3) and we shall learn examples of deities because the Romans were polytheists. meaning they believed in many gods.'

We can see in example (22) how the teacher is constantly interrupted by the two students. The overlapping speech, even though brief (repetition of some syllables or single words), should have not occurred at all. The teacher is not allowed to finish her ideas; thus, the flow of the presentation is discontinued, and it is hard to resume, as indicated by the teacher's pauses and hesitations. These kind of interruptions and overlaps are not only impolite linguistic behaviour, but they are also strategies students employ in order to make their voice heard, to draw teacher's attention and to challenge her. These are the students' methods of claiming power under the guise of paying attention to what the teacher is saying. S1, for example, is attentive, and when he finds the possibility to infer the next

word the teacher is about to say, he does not hesitate to utter it; in this way, he tries to demonstrate that he already knows what the teacher has to say.

### *4.2.2. Being uninterested*

Example (23) shows lack of interest in school matters, at the same time questioning the role of the school as an institution.

(23) T: do you think this kind of colour inspires you when you have to study? /(.)/ when you have to focus (.) on something else?
S: **/I don't study./** no.
T: maybe: you've got a project to do or something (.) I don't know (.)
S: **I don't really care about projects.** when I do projects or something like that I mostly listen to music. [unclear] **I don't really care about school.**

The student's interventions – the ones written in bold – are perceived as being abrupt and categorical, threatening the teacher's face. The teacher tries to make the student reconsider his position, providing some alternatives ("projects"), using hedges ("maybe", "I don't know") to counter the student's negative attitude. From example (24),[2] we can infer the student's lack of interest in the school subject, as he bluntly admits he has no coursebook and no notebook.

(24) S: *n-am ce-mi trebuie.*
'I don't have what I need.'
T: why not?
S: *am uitat cartea acasă.*
'I forgot my book at home.'

### *4.2.3. Challenging*

Students use challenging questions to contest the teacher's authority or to test the teacher's patience. In example (25), the teacher is asking students to express their opinions on what items of furniture they would include in a students' common room. She randomly calls on students to express their ideas and motivate their choices.

(25) T: **what about you X?**
S1: **what about me?**
T: what are the items?

2 This is an example in which the student uses Romanian instead of English. See the translation below each line.

S1: (silent)
T: you don't have the BOOK. /what items would you prefer/ for a common students' room?
S1: /yeah. I don't have the book./
(a few minutes later)
T: **what about you Y?**
S2: **what about me?**
T: how would you imagine this common room that you share with other students?

When nominating a student, the teacher uses the question 'What about you?' followed by the student's first name (which is not included in the transcription due to ethical considerations). The teacher's intention is clearly perceived by the students as they understand that the teacher is asking for their opinion. Instead of providing an answer, the two students respond to the teacher's question with another question (see the symmetric patterns written in bold). The reason why they resort to these challenging questions is the fact that they were not paying attention to the activity; S1 even admits to not having the coursebook. In order not to lose face by remaining silent when asked a question by the teacher and to stall for more thinking time, the students prefer to challenge her. The teacher reacts by reformulating her question and including the details the students were supposed to know, and the activity progresses.

### *4.2.4. Being sarcastic*

Example (26)[3] is characterized by sarcasm as it reveals a student's remark that appears quite neutral on the surface but that actually has some impolite implications. This is an example from the English class illustrating how a student with better knowledge of English can be impolite to a student whose English is not as good.

(26) T: X.
S1: (silent)
Ss: *ieşi la tablă.* (more students addressing to S1)
'go to the board.'
S1: (silent)
T: come on.
S2: *IEŞI la tablă.* (another student addressing to S1)
'GO to the board.'

3 This is another example in which the students in the English class use Romanian in their conversation. See the translation below each line.

S3: ***vezi că tre să scrii, bă.***
**'be careful, you have to write, dude.'**
Ss: (laughing)

When the teacher asks S1 to come to the blackboard, he does not comply at the beginning. This behaviour triggers the reaction of his classmates, who explicitly tell him what he is supposed to do. But S1 still hesitates, so the teacher reformulates her request ("come on"), and S2 translates the request into their mother tongue. S1 is a student with a lower level of English, so the fact that his classmates use their mother tongue to explain what the teacher expects of him can be a sign of solidarity. Both the teacher and the other students use imperatives not necessarily to attack S1's face but rather to urge him. In this context, S3's utterance seems sarcastic, even if said in a quiet voice and not heard by everyone. The fact that S1 has to write once he comes to the blackboard is obvious, but what S3 suggests is that S1 does not know how to write in English. S3's intention is to make a joke, which is why those who have heard him laugh. For S1, though, it is an offensive joke.

## 5. Conclusions

The classroom represents a unique context with a hierarchical relationship – the teacher is the one who possesses more knowledge, and thus, the one who can exercise power over the students. The teacher also has institutional power. This state of things could make someone think that politeness is suspended in the classroom, but the evidence from the data proves this is not the case. The starting point of this research was the idea that teachers mitigate their legitimate power in order to reduce the social distance, while students tend to claim power in order to assert their identities. This power negotiation definitely involves polite and/or impolite behaviour.

According to the data, there were more negative politeness strategies used in the classroom interaction than impoliteness strategies. Furthermore, negative politeness strategies were mainly employed by teachers, whereas impoliteness strategies were used more by students. This proves that teachers are generally more concerned about building a relationship based on respect with the students, while students tend to challenge that formality imposed by the teacher. The negative politeness strategy resorted to most frequently is minimizing the imposition so that students should not feel threatened or pressured. Teachers also resort to indirect speech acts to reduce the force of their directives and, at the same time, to give students the possibility to decide, to take responsibility for their own learning. According to the data, the teacher of English appears to

be more indirect than the history teacher, who is balder on record. A possible explanation may be the difference in age.

All in all, teachers use a lot of mitigation forms showing they are oriented towards face relations and politeness. Hedges, questions, and indefinites are extensively used to diminish the imposition and maintain students' face. Teachers resort to negative politeness strategies for classroom instructions when motivating or evaluating students or for classroom management. Students also use negative politeness strategies when giving deference to their teachers. But students also use impoliteness strategies: they interrupt or speak simultaneously with the teacher; they are dismissive, uninterested and contest the teacher's indications/suggestions and often challenge her authority; sometimes they are sarcastic towards their own peers in order to demonstrate their superiority.

Politeness is widely employed to achieve tactful and effective communication in the classroom. By using negative politeness strategies, teachers create an environment where students feel respected and unthreatened when they make mistakes. Overall, while politeness is used to dissipate power, impoliteness is used to assert power.

## 6. Limitations of the present study

There are a number of limitations of the present study that have to be taken into consideration. First of all, the research is not a large-scale one. The validity of the data would be higher if more teachers were involved in the research. Second of all, the research is based only on audio recordings, so politeness and impoliteness phenomena are only analysed from a linguistic point of view. A more comprehensive approach to politeness and impoliteness in terms of non-verbal behaviour could be the starting point for future research. Last but not least, the students' own interpretation of the polite and impolite sequences was not included. The analysis is the researcher's interpretation of the data, and, as such, other researchers may bring a different perspective on the data.

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# Appendix

**Transcription Conventions**

| ***Symbol*** | ***Significance*** |
|---|---|
| ***.*** | clause final falling intonation |
| ***?*** | clause final rising intonation |
| ***(.)*** | short hesitation within a turn (less than 2 seconds) |
| ***(2)*** | inter-turn pause longer than 1 second, the number indicating the seconds |
| *//* | the onset of overlapping talk |
| ***: :*** | lengthened syllables or vowels |
| *[unclear]* | non-transcribable segments of talk |
| *‘’* | translation |
| *(words in brackets)* | further explanations |
| *CAPITAL LETTERS* | word stressed |
| *T* | teacher |
| *S* | student |
| *Ss* | all students speaking at the same time |

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# Changes and Perspectives in Teacher Training Methodology

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**Abstract.** School closures induced by the COVID-19 crisis have led to the rethinking and reshaping of teacher training considering the norms of online and blended learning, and the pressure to embrace the possibilities offered by information and communications technology. We propose to examine the new perspectives and necessary changes related to three domains in which our institution – the Teacher Training Institute of Sapientia Hungarian University of Transylvania, Faculty of Technical and Human Sciences – offers training: foreign languages, social sciences, and engineering. Different areas of education have been affected in different ways by the pandemic. In language teaching, familiarity with pre-existing platforms and programs helped the transition to online education. In the field of social sciences, the transfer of theoretical information did not cause any particular problems, but the development of interpersonal relationships, interactivity, and communication became more difficult. In the domain of engineering, practical education has become nearly impossible, as in order to develop certain practical skills students need access to laboratories equipped with special tools, devices, and instruments. In our study, we will focus on ways of updating and developing our methodology courses based on new paradigms and good practices presented in the specialized literature, also reflecting on feedback received from our teacher trainees related to their difficulties and needs revealed by the shift to online teaching.

**Keywords:** methodology courses, teacher training, languages, social sciences, engineering

## Introduction

The fourth industrial revolution, taking place in the present day, is about linking different machines and sensors into one single information network. This is already an augmented reality, the era of artificial intelligence and the development of 3 or even 4D printing, the world of the Internet of Things (IoT) (Ashton 2009).

The changes generated by the industrial revolution did not leave the school system unaffected. Basically, they affected the content of education mainly with the expansion of the curriculum, while the tools and methods changed relatively slowly. However, digitalization, the emergence and spread of computers generated significant changes. At the beginning, the number and quality of tools available was not adequate, the methodological training of teachers was scarce, and there was very little good-quality digital content. Later on, schools became better equipped, and Internet access indicators improved, but content development and teacher training did not keep pace with the changes.

ICT had an impact not only on the teaching process – transforming and expanding the traditional teaching and learning environment – but also on students (Ciascai 2018). Members of generation Z appeared in schools, those who were already born into the age of information, and for them networking is more natural than anything else in the world. In this world, almost any information can be accessed anytime, anywhere, the reason why teachers lost their "central source of information" status (Buda 2017), their former role of "sage on the stage" (McNair 2001). Today's students have a hard time accepting the need to learn data, definitions, and formulas that can be accessed in seconds with the help of the World Wide Web.

The COVID-19 pandemic highlighted the need for teachers who are proficient in digital technologies and can use them confidently in order to continue effective educational activities and maintain student activity and motivation. The new type of learning environment, the new technology requires new methods and approaches from teachers. Teacher training institutes have a key role in this process as teacher training is a self-reproducing segment of education (Péntek 2005).

Therefore, it is important to determine what new perspectives and changes are necessary related to three domains in which our institution – the Teacher Training Institute of Sapientia Hungarian University of Transylvania, Faculty of Technical and Human Sciences – offers teacher training: foreign languages, social sciences, and engineering. The accredited Institute operates in three locations (Cluj-Napoca, Miercurea Ciuc, and Târgu-Mureş), and the unity of its operation is ensured by the methodology of the institute, the admission and examination methods, and the pedagogical practice implemented in the same system.

In this study, we examine how the different areas of education have been affected by the pandemic. Based on our experience, we assume that in language

teaching familiarity with pre-existing language teaching platforms and programs helped the transition to online education. In the field of social sciences, the transfer of theoretical information did not cause any particular problems, but the development of interpersonal relationships, interactivity, and communication became more difficult. In the domain of engineering, practical education has become nearly impossible, as in order to develop certain practical skills students need access to laboratories equipped with special tools, devices, and instruments.

## 1. General concepts about the role of ICT in education

As a result of the spectacular development of digital technologies since the late 1990s, teaching and learning activities have become continuous. Dating back more than two decades, the European Union, recognizing the importance of integrating digital technologies into education systems, formulated as an objective in its policy to promote the acquisition of knowledge in an innovative way by methodologically integrating different technological tools in order to create a knowledge-rich learning environment with the use of info-communication programs.

In 2020, the European Commission published a Communication on the digital education action plan related to 2021–2027, entitled *Resetting Education and Training for the Digital Age*.[1] Two guidelines were formulated: (1) creating an appropriate digital educational environment and (2) developing new digital skills and abilities.

In order to enhance the quality of education and training systems: there is a need to define digital strategies capable of providing the right infrastructure, user-friendly tools, and accessible digital content; a fast and reliable Internet connection is needed to use high-bandwidth applications, programs, and cloud-based services in education; teachers must be proficient in the use of digital tools, be able to learn new, innovative methods, and use them with confidence.

In the field of digital skills and abilities, improving digital literacy requires competence-based knowledge that develops problem solving and critical thinking. In education, emphasis should be placed on the development of actual, applicable, quality knowledge, while through IT education, learning about the digital world must be ensured from an early age.

In recent years, improving the provision of IT tools and encouraging, training, and developing teachers to use ICT tools in education have also been identified as priorities in Romanian education policy. According to the guidelines set out

1 Communication from the Commission to the European Parliament, The Council, The European Economic and Social Committee and the Committee of the Regions. Digital Education Action Plan 2021–2027. Resetting education and training for the digital age. https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52020DC0624.

in the *Europe 2020 Development Strategy on the Digital Agenda for Romania*, educational institutions must be provided with the appropriate infrastructure to enable the proper use of ICT tools. It aims to develop the digital competence of students and teachers by organizing professional courses that can improve the quality of education and their digital skills. Furthermore, it aims to provide an opportunity to integrate Web 2.0 interfaces into the teaching process that would help teachers in their professional development and increase the effectiveness of classroom training. Among its guidelines, it highlights the encouragement of students to actively use interactive teaching materials and information provided by the Internet.[2]

## 2. New circumstances in teaching languages, social sciences, and engineering

The training in these three fields of education operates on the basis of a unified curriculum, which is based on the national methodology, wherefore the educational framework is unified. The different teaching and methodological features corresponding to each field of education can be taught within the framework of the methodology courses and teaching practices. In addition, a very important factor is that the changes in these three fields of public education are different, not only due to the fields of science but also due to the fact that they have had different roles and statuses in mainstream education in the last 30 years.

In the domain of language teaching, research and development enables teachers to adapt to new circumstances. This is also reflected in the 2020 version of the *Common European Framework of Reference for Languages: Learning, Teaching, Assessment – Companion Volume*, in which, compared to the previous version, more emphasis is placed on online interaction, an essential factor following the shift to online teaching and learning.

In the chapter dedicated to online interaction, online communication is defined as being "always mediated through a machine, which implies that it is unlikely ever to be exactly the same as face-to-face interaction" (Council of Europe 2020: 84). The characteristics of online group interaction "are almost impossible to capture in traditional competence scales focusing on the individual's behaviour in speech, singing or in writing. For instance, there is an availability of resources shared in real time. On the other hand, there may be misunderstandings that are not spotted (and corrected) immediately, as is often easier with face-to-face communication" (Council of Europe 2020: 84). Therefore,

2 National Strategy regarding the Digital Agenda for Romania, September 2014; available in Romanian: Strategia Națională privind Agenda Digitală pentru România. https://www.ancom.ro/uploads/links_files/Strategia_nationala_privind_Agenda_Digitala_pentru_Romania_2020.pdf.

successful communication requires more redundancy in messages; it needs to be checked if the messages have been understood correctly; reformulations may be necessary for comprehension, and misunderstandings must be dealt with; emotional reactions need to be handled appropriately. The CEFR – Companion volume offers a descriptor scale for online conversation and discussion covering levels from Pre-A1 to C2, focusing on online discussion and conversation as a multimodal phenomenon, emphasizing "how interlocutors communicate online to handle both serious issues and social exchanges in an open-ended way" (Council of Europe 2020: 84). Language teaching and teacher training in Romania aims to follow the CEFR guidelines and principles.

The teaching of social science subjects has taken a special path in Romanian education. In the period before 1990, either the subjects belonging to this field of education did not exist or – in accordance with the unilateral political party approach – very limited knowledge was included in the textbooks. Changes in the education system in the early 90s had a positive effect on the teaching of social sciences: logic, sociology, psychology, and philosophy were taught in high school. However, there were no substantial changes in the primary school stage.

The importance of developing a people and society literacy as well as its foundation in primary school and secondary school were outlined in the 2000s but was only concretized in Law on Education no. 1/2011.[3] The new education law fundamentally reformed public education in Romania (Anghelache et al. 2018), so new subjects were introduced in secondary schools: social education in the 5th and 6th grades, civic education in the 7th grade, and economic education in the 8th grade. In addition, personality development as well as counselling and self-knowledge classes are available as optional subjects, and school and career choice activities are available in all grades.[4] In the upper secondary education, the cultural domain of people and society includes the following subjects: history, geography, social education, and religion.

A fundamental change of attitude took place in Romanian education, with a shift from an almost exclusively information-based education to competence-based education and an emphasis on practical experience. This change in approach is reflected in the general curriculum of grades 5–8 and in the school curriculum of people and society education.[5] In accordance with the new general curriculum

3 Law of National Education no. 1/2011, available in Romanian: Legea Educației Naționale nr.1/2011. https://www.edu.ro/sites/default/files/legea-educatiei_actualizata%20august%202018.pdf.

4 Education framework plan for middle school, available in Romanian: Plan cadru de învățământ pentru învățământul gimnazial. http://programe.ise.ro/Portals/1/Curriculum/Pl_cadruactuale/Gimnaziu/OMENCS%203590_5%20apr%202016_Plan-cadru%20de%20%C3%AEnvatamant%20pentru%20gimnaziu.pdf.

5 Curriculum for social education, classes 5–8, available in Romanian: Programa şcolară pentru disciplina Educație Socială clasele a V-a–VIII-a. http://programe.ise.ro/Portals/1/Curriculum/2017-progr/28-Educatie%20sociala.pdf.

and school curriculum, new textbooks were published. The textbooks also reflect a practical, skill, and ability development goal. For example, in the 5th-grade textbook, students can learn about concepts such as reasoning, forming personal opinions, prejudice, stereotype, various rights and obligations, protection, abuse, social support, privacy, freedom of speech, minority, NGO, etc. (Ciocâlteu et al. 2017). The textbook has a new, more transparent structure, so it is much easier for students to understand and learn new concepts and gain knowledge. With these concepts, they will look at the world through different eyes and will find it easier to overcome obstacles in their personal lives. The textbook has lots of pictures, and the exercises and tasks are also varied.

The 6th- and 7th-grade textbooks are also colourful, interactive, with interesting content in many ways: culture and cultural diversity, cultural identity, interculturality, intercultural communication, acceptance, respect, solidarity, etc. (Bratu et al. 2018, 2019). The lessons contain the relevant concepts and definitions, the text is well structured and easy to understand, supported by many practical examples, and the exercises focus on understanding the curriculum. The textbooks are practical in nature, less theoretical, and this benefits today's students.

All 5th-, 6th-, and 7th-grade textbooks have changed methodologically, as they give the teacher many ideas for conducting group exercises and applying project methods and interactive methods.

All these positive changes began to develop in recent years, but it cannot yet be said that they have already been put to practice or have become a routine. We would rather say that they started down this road as the result of a substantial and necessary change of attitude. At the beginning of this journey, there was a change in the learning and educational environment due to the pandemic, which also put teachers and students to another test, which resulted in an interesting paradox: developing social skills without social coexistence, developing communication skills without the personal presence of the adolescent group.

Online education brought along a special, formerly unknown situation: what, how much, and how to teach students. Regarding the transfer of new information related to social education subjects, the online form of education is not an obstacle. However, the development and improvement of various skills, such as social and communication skills, can be implemented only to a small extent, as the basic condition for this is personal presence.

Engineering teacher training prepares students to teach subjects in the field of technology. There is a strong connection between engineering teacher training and secondary vocational training: some students in vocational secondary school apply for engineering specializations in higher education. As engineering instructors, teacher trainees will be able to teach specialized subjects at the lower or upper level of vocational training, depending on their qualifications. Renewing vocational training is part of the EU's multiannual policy. It is also identified

as a specific area in the ET2020[6] work programme as a strategic objective to improve the quality and effectiveness of training through the acquisition of key competences. Therefore, more attention should be paid to improve the level of the basic skills such as numeracy and literacy. Thus, certain subjects, such as science, technology, and mathematics, may become more attractive.

It emphasizes the need to ensure adequate initial teacher training, the continuous professional development of teachers, and the need to make teaching an attractive career in order to raise the standard of training. In recent years, the issue of vocational training has also found a new foundation in Romania. The education and training strategy[7] for 2016–2020 was closely aligned with the objectives set by the EU.

In the third chapter of this study, we focus on new paradigms and good practices presented in the specialized literature, which we consider helpful in updating and developing our methodology courses. This is followed by the fourth chapter, containing a presentation of feedbacks received in a semi-structured interview from our teacher trainees, related to their difficulties and needs revealed by the shift to online teaching.

## 3. Online, blended, and adaptive teaching and learning – Concepts and developments

A considerable amount of research focuses on ideas and practices regarding online, blended, and adaptive teaching and learning. In the domain of education, these concepts are not new, they were developed in parallel with the development of information and communications technology. The COVID-19 pandemic confirmed that the existing knowledge and experience related to these topics must gain more importance in teacher training. The possibilities for communication provided by the Internet and quick access to information can be equally helpful for individual learning and group activities.

*Adaptive learning* is "a method of education that uses computers and data to adjust the learning experience to the individual student",[8] according to a definition offered by Macmillan Dictionary. Kerr (2014) examines the concept and practice of adaptive learning, mentioning that ELT publishers started to move

6 Council conclusions of 12 May 2009 on a strategic framework for European cooperation in education and training (ET 2020): https://eurlex.europa.eu/legalcontent/EN/TXT/HTML/?uri=CELEX:52009XG0528(01)&from=HU.

7 Strategy for vocational education in Romania for the period of 2016–2020, available in Romanian: Strategia educației şi formării profesionale din România pentru perioada 2016–2020. https://www.edu.ro/sites/default/files/_fi%C8%99iere/Minister/2016/strategii/Strategia_VET%2027%2004%202016.pdf.

8 https://www.macmillandictionary.com/dictionary/british/adaptive-learning.

away from the world of traditional printed textbooks, investing heavily in digital courses containing adaptive learning elements. A growing number of online teach-yourself language learning apps and programs with adaptive learning software are available, such as Rosetta Stone, Babbel, or Duolingo, complementing institutional language learning. *Gamification* may be one of the reasons for their popularity. Users are awarded points and badges, just like in computer games, and can reach different levels. This motivates language learners because the work seems to be more fun. The approach and tools of gamification can be an alternative at several different levels and areas of education if its introduction is preceded by circumspect and careful planning (Balogh 2017). Every student loves learning through playing, discovering and learning new things, for which the Internet offers an excellent opportunity, as there are many repositories where controlled, peer-reviewed curriculum is available. The role of the teacher is to consciously guide the students, to help them navigate the World Wide Web, and to compile learning paths tailored to the students' knowledge. With the help of various routes, it is possible to create both easier and more difficult sets of tasks and thus give students the opportunity to choose according to their knowledge and abilities. It also provides effective support in the development of learning activities in the teaching of subjects related to the field of technology. There are many useful applications available to both teachers and students. The most popular apps are Sutori and Symbaloo, but applications like Wordwall, Quizalize, Kahoot, LearningApps, or Flippity are also well liked.

The growing popularity of online learning platforms is also mentioned by Kerr (2014). These are also known as Learning Management Systems (LMSs) or Virtual Learning Environments (VLEs) such as Moodle. Institutions can use them to store and deliver course content such as activities, tasks, and lectures. They may also offer mechanisms for course administration, assessment, social networking, and other forms of communication. Mostly they are used for blended learning, but exclusively online courses can also be delivered and administered with their help.

The main issues, trends, and research related to *online learning* were also examined by Hockly (2015), who lists the variety of terms referring to the phenomenon, often used interchangeably, such as distance learning, hybrid, or mixed learning, e-learning, blended learning, and web-enhanced learning, mentioning that these terms often overlap, causing confusion in their use. She distinguishes two main categories: blended teaching and learning (a combination of face-to-face and online learning) and fully online teaching and learning (which includes no face-to-face interactions, only work via the Internet).

White (2006) identified some important pedagogical research areas regarding *fully online, distant language learning* such as course development, course evaluation, teaching roles, learner support, choices and challenges in technology use, learner contribution, and perspectives for future research. Lamy (2013)

identified some other research areas based on White's research such as the effect of multimodality (various modes of producing meaning in digital communication), gathering more information about learners, and online teacher training. White (2014: 538) proposed that more emphasis should be placed in research "on theory, pedagogy, technology use, learner contributions, innovation and less commonly taught languages".

However, it may be more difficult to implement distant learning in disciplines related to engineering, where practical acquisition of knowledge is an integral part of education. The challenge is how to make "real" laboratory practice via the Internet (Balamuralithara 2009). It may also cause problems if the education process requires the use of special programs that are licensed to an institution. In order to make the best possible use of online learning in the field of engineering education, according to Bourne et al. (2005: 131): "(1) the quality of online courses must be comparable to or better than the traditional classroom, (2) courses should be available when needed and accessible from anywhere by any number of learners, and (3) topics across the broad spectrum of engineering disciplines should be available".

In shaping the literacy related to man and society, the online form of education can be well used as a necessary solution in emergency situations such as a pandemic. However, in the long run, personal education or blended learning is more effective in shaping and developing social skills.

*Blended learning* was first developed in the domain of corporate training, and then it was adapted to higher education as well. Whittaker (2013: 11) states that the term "signifies the inclusion of computer technology providing online or offline activities and materials in the mix, rather than implying this is a wholly new approach to teaching and learning". She defines blended learning as a "combination of face-to-face teaching with computer technology (online and offline activities/materials)" (Whittacker 2013: 12). To this, Hockly (2018: 97) adds that "the use of 'computer technology' as part of blended learning is usually understood to take place in another location to the face-to-face (f2f) teaching, and most likely in the learners' own time". She also states the reasons why blended learning is becoming more popular in language teaching: affordable and easily accessible digital tools; financial considerations; large number of learners and limited space in schools; not enough exposure to the target language in face-to-face classes; political instability in certain parts of the world where the physical attendance of classes is not possible; the pedagogical concept that a balanced use of face-to-face and online teaching and learning can offer significant benefits. Course design for effective blended learning and finding the optimal balance between face-to-face and computer-based work may depend on various factors such as the context in which the course will take place, the available technology, and the needs of the learners. Blended learning as a new form of

education has also reformed engineering teacher training. Taking advantage of the opportunities offered by the Internet and digital media, it provides an effective learning framework that can best contribute to student development. However, in terms of its pedagogical advantages, it is not popular in engineering education, as the development of the curriculum is difficult to implement in a way that simultaneously develops students' digital skills, critical thinking, and problem-solving skills. On the other hand, due to the rapid pace of technical development, blended learning resources require continuous development and updating (Alkhatib 2018). The curriculum for social education and textbooks already made blended learning possible, as there are also electronic versions of textbooks, containing audio-visual elements such as short films, animations, etc., and they also provide Internet resources and websites.

There is also a significant amount of research related to the use of artificial intelligence (AI) in language teaching (Longwell 2018, Gawate 2019, Wang 2019) and in teaching skills related to engineering (Ramirez-Mendoza et al. 2018, Sakhapov–Absalyamova 2018). Learning platforms powered by AI allow learners to concentrate on issues they have more difficulties with, to work at their individual pace, choosing topics they are interested in, taking into account their cultural background. AI is based on collecting and using data, which allows teachers to foresee their students' future performance and understand them better.

Teacher educators need to be aware of the advantages, possibilities, and benefits but also the limitations and eventual disadvantages of the above mentioned means, concepts, and practices and need to introduce the available knowledge and experience related to them in the curriculum.

## 4. Teacher trainees' experience and reflections related to online teaching

This chapter shortly presents the results of a semi-structured interview organized in order to learn about our students' opinions and insights related to their online teaching practice experience.

Most of our translation and interpretation students, a large number of engineering students from five areas of engineering (Computer Science, Automation and Applied Informatics, Mechatronics, Manufacturing Engineering, Telecommunication) and social sciences students (Communication and Public Relations, Public Health Services and Policies) are also teacher trainees.[9] The subject structure of the Teacher Training Institute is defined by a

9 In 2019–2020, the third year was composed of 17 teacher trainees out of 29 translation–interpretation students, 19 teacher trainees out of 90 engineering students, and 10 teacher trainees out of 49 social science students.

decree of the Ministry of Education.[10] According to this, teacher trainees study Teaching Methodology related to their specialization in the second year. In the third year, this is followed by Pedagogical Practice I, within the framework of which students observe classes, and Pedagogical Practice II, when they teach independently. The structure of training for the teaching of social sciences is similar to the language and engineering teacher training: in the second year, students study Social Science Methodology, and in the third year they also have Pedagogical Practice, when they observe social education classes in 5–8 grades and practice teaching this subject.

The interview was conducted in the second half of the 2019–2020 school year, in the first phase of the pandemic. Thirteen students participated in the interview: five language teacher trainees, three students from social sciences, and five engineering students. We informed all our students about the possibility of participating in the interview, held a preliminary discussion with those who had indicated their intention to participate, and assured them that the data were used exclusively for research purposes, and their name and personal information would not be disclosed. The average time of an interview was 40 minutes, implemented on a Google Meet interface. The conversations were recorded with the consent of the students.

During the COVID-19 pandemic, teacher trainees could not visit classes or practice teaching face to face because schools were closed, and all teaching took place online. Observing and practising teaching online was challenging, as nobody was prepared for this scenario. The questions of the semi-structured interview referred to the following issues: advantages and disadvantages of face-to-face versus online teaching; their previous experience in using ICT tools; changes in student autonomy and in the role of the teacher; perspectives of education following the shift to the online space; their difficulties and any new things they learned while working online; skills and knowledge that were not included in their training but that would have been useful in online teaching. The data collected during the interview were thematically organized, processed, and then summarized.

Among the benefits of personal presence in the classroom (compared to online teaching), they mentioned the following: more possibilities for interpersonal connections, interactivity, teamwork, direct, spontaneous interaction; the teacher can see the students and realizes sooner if they do not follow the explanation or they do not understand something; gestures, physical movement, and action make learning and memorization easier and more fun; learners can concentrate more easily and for longer, and they are more motivated.

10 Order of the Ministry of Education no. 3850, issued on 2 May 2017, regarding the methodology of organizing psychopedagogical programmes at the accredited universities, available in Romanian: https://www.edu.ro/sites/default/files/fisiere%20articole/ORDIN%203850-2017_0.pdf.

As advantages of online work (opposed to classroom presence), they mentioned: it is easier to play videos, sound files, start online games in class; students are not late for class, it is not necessary to get up earlier and to travel long distances in rush hours; students do not disturb each other, do not distract each other from the explanations; the teacher needs to spend less time resolving conflicts.

However, they observed several disadvantages of the online school: technical difficulties such as weak Internet connection; lack of modern, suitable devices (computers or tablets); lack of user knowledge and experience; sitting in front of a computer, laptop, or tablet for hours is uncomfortable and tiresome; communication is difficult due to the lack of physical, personal interaction (invisible gestures, facial expressions, and movements); breaks cannot be filled with games or movements; there are fewer opportunities for students to help each other, discuss what some of them have not understood; there are fewer opportunities for teamwork; students may feel lonely and isolated; it is easier to learn a language if students can touch, move certain objects, or with the help of role-play activities; because of the practical aspect of engineering-related topics and skills, these subjects can be taught mainly with the use of illustrative tools – learners following the practice through the screen is not the same as actually doing it; action-based learning in online space is more limited; it is harder for the teacher to supervise the students and make sure everyone is paying attention and not doing something completely different.

Related to changes in student autonomy, most respondents stated that students became more independent while working online. Autonomy also stemmed from the fact that students could not contact each other or the teachers as spontaneously and as often as before, and instead they turned to online resources, trying to be informed, to discover certain solutions. The role of the teachers also changed: they deliver information, give technical support, and coordinate online work without the possibility to conduct activities for experiential learning, team building, or personality development.

The respondents mentioned a few possible changes such as: digital tools will play an increasingly important role and will also influence changes in teaching methods. They believe that digital tools are useful and increasingly popular, but they cannot replace the teacher. Learners like to use electronic gadgets, applications, and programs, wherefore these means can be helpful in language teaching and learning. However, they also highlighted the importance of maintaining personal communication, teamwork, pair work, role-playing games, simulations, physical activity, learning by doing, and class work based on interactivity.

We also asked what prior knowledge or skills would have been helpful to them in teaching online. Based on the answers, it would be useful to include the following in the methodology course material: managing interfaces for online lessons (such

as Google classrooms); organizing group or pair work online; practising how to reorganize, adapt certain types of tasks to online work; developing writing skills in the online space; problem solving and class management online.

## 5. Discussion – Changes and perspectives

Restrictive measures to curb the coronavirus pandemic provided a new impetus to discover the potential of digital education, to flexibly transform the learning environment in order to meet current needs, and to be space- and time-independent. Students adapted well to the new circumstances, having to adapt to a more independent learning and a daily schedule based thereon. In this unexpected situation, teachers were also forced to reform the way of conveying knowledge in a short time. Based on the online teaching experience of more than a year, we formulated changes that are important (in terms of attitude) for teacher education and that can serve as a guide for the coming period as well.

When, in accordance with the new provisions, the universities in Romania closed, the management of Sapientia University acted efficiently and expeditiously. By defining and providing the use of a single online platform, teaching and learning activities could be continued almost without interruption. Thanks to this, teachers were able to focus on figuring out how to continue their semester activities (lectures, seminars, and practical classes) and what technologies to use. There were serious disruptions in educational institutions where the management did not organize and standardize the online form of education, where teachers were entrusted with finding the online communication channel through which they could deliver content to students. Some teachers with various digital skills and experience did not thrive in using online platforms, and students had great difficulties transitioning from one online interface to the other to attend classes.

In teacher education, in order to ensure the continuity of education in all situations, a detailed strategy and framework based on a unified concept must be developed, which provides support and suggests guidelines even in unexpected situations. This unified concept will be developed after detailed discussions and coordination among the teachers of the different methodology courses at our university.

Besides the teachers who preferred the traditional teaching techniques, the number of those who used info-communication tools and digitally prepared curriculum in the class was more pronounced (Harangus 2017). On the other hand, education, having moved to the online space, called for a different set of tools, methodology, and time management. Consideration had to be given to the inexperience resulting from the use of devices, initial errors, and the replacement

of traditional instructional materials with digital formats. Although interfaces suitable for online teaching were available, teachers were not aware of the great potential of these applications.

In teacher training, within the framework of ICT courses, more emphasis should be placed on the use of those digital tools and web platforms that can help to take advantage of the educational opportunities of virtual reality. This can help teacher trainees to transfer knowledge effectively as practising educators.

Our study proved that in the domain of teaching foreign language and social sciences it was easier to find online solutions in order to continue teaching, while in engineering education, where teaching had been based on more face-to-face practice with the help of different equipment and tools, it was more difficult to adapt to the new teaching system. There are several fields related to engineering where it is simply impossible to create an online version for practice. At first, it seemed that education forced into virtual space posed insurmountable problems. Despite the difficulties, the transition took place, with teachers from public schools adapting to the challenges. They tried to manage the situation with ingenuity; they sent educational films and made videos about the materials needed for the practical lessons.

Consequently, in engineering teacher training, more attention should be paid to the methodological preparation of undergraduate engineering students in order to be able to choose the tools from the available, versatile web interfaces and online educational opportunities, which can be beneficial for both teachers and students to help achieving learning outcomes in the case of online teaching.

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# Developing Adult Learners' Language Competence in Culture-Based Blended-Learning Course

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**Abstract.** During the last two decades, due to technological possibilities and the spread of the Internet, new forms of learning have originated as an alternative to traditional face-to-face learning – e-learning, online learning, hybrid learning, blended learning, ubiquitous learning, etc. They have become even more popular due to the COVID-19 pandemic as the only solution to implement learning at universities and adult education institutions. This paper will focus on a blended-learning language course designed for adult learners. The aim of the current research is to evaluate the course created and the development of adult learners' English language competence during the course implementation in six EU countries – Croatia, Latvia, Slovenia, Romania, Poland, and the Czech Republic. 227 adult learners and ten English-language teachers were involved in the course piloting. Research methods applied: learners' survey after the course completion, unstructured observation of learners done by teachers during the course, and structured interviews with the teachers after the course implementation. In this paper, the observation results and the findings from teachers' interviews will be analysed. The findings highlight both positive aspects and challenges of the course created. Learners have gained cultural knowledge, increased their vocabulary, and developed reading skills, while at the same time improvements in developing learners' listening and writing skills are also required.[1]

**Keywords**: blended learning, language competence, interaction

## Introduction

Nowadays, "in a digitalized society blended learning has become a favorable approach in adult education" (Cocquyt et al. 2019: 1), gaining momentum

1 The research was conducted in the framework of the Erasmus+ project *Cultural Knowledge and Language Competences as Means to Develop 21st-Century Skills* (Project No. 2018-1-HR-01-KA204-047430; 2018–2021).

in higher education because of its flexibility of time and place when offering courses to a very diverse student population (Boelens–Voet–De Wever 2018). Although initially flexibility, place, and pace were considered the main benefits of blended learning, more recent studies highlight its opportunities to target students' individual needs in terms of the course content and teaching/learning methodologies (Boelens–Voet–De Wever 2018, Cocquyt et al. 2019), interaction between teachers and students securing more learner engagement as well as cost effectiveness (Rasheed–Kamsin–Aniza 2020). Blended learning corresponds with the social constructivism approach to learning, and thus it is suitable for adult learners. Since interaction takes place in face-to-face and online modes, it provides both social and dialogical learning experiences (Cocquyt et al. 2019) in a dynamic learning environment fostering learners' social and interactive skills, language competences and helps language learners use their cognitive skills in becoming active recipients, exploring new learning tools, collaborating and interacting with other learners as well as reflecting on their performance (Kaya 2015). The approach ensures interaction among the teachers and learners, and therefore it is applicable in second language teaching/learning.

In 2013, Castaño Muñoz and colleagues implied that "by 2030 adult learning will be ubiquitous learning" (Castaño Muñoz et al. 2013: 174), taking place anywhere and at any time by using various technological devices such as PC, smartphones, tablets, WebPads, GPS, multimedia, etc. The use of ICT and other technologies will be a regular part of adult learning. Seven years later, due to the COVID-19 pandemic, it became a reality for all educational stages, when most of the world switched over to online teaching/learning, and online and blended learning became the "new normal" (Bruggeman et al. 2021: 2, Moser–Wei–Brenner 2021: 10). This also causes "ongoing changes in language pedagogy, including but not limited to the expanded use of online learning in place of face-to-face instruction" (MacIntyre–Gregersen–Mercer 2020: 11). In the context of blended learning, this means that the face-to-face stage is implemented in an online mode using various learning platforms and other technological means instead of real-class meetings.

This paper will focus on a blended-learning language course for adult learners created within the Erasmus+ project *Cultural Knowledge and Language Competences as Means to Develop 21st-Century Skills* involving Croatia, Latvia, Slovenia, Romania, Poland, and the Czech Republic (Project No 2018-1-HR-01-KA204-047430; 2018-2021) and will evaluate the development of adult learners' English language competence attained during the course implementation in the partner countries.

## Theoretical background
## The approach

Globalization and technological advancement have affected people's lives in nearly all fields, and the role of English continues to increase. At the same time, although the goal of any second language learning is communication, recent studies (Chvala 2020) show that communication contexts are changing and a more globally oriented, multilingual approach to ELT is required, one that stimulates awareness of sociolinguistic realities.

Traditionally, language learning in a university setting comprises three challenges: the high number of students per class, the different levels of students' language proficiency, and the challenge of speaking in a foreign language to other groupmates for whom it is possible to communicate in their mother tongue (Bueno-Alastuey–López-Pérez 2014). Blended learning may help solve these challenges as it ensures a more individualized approach to learner engagement in activities, and, consequently, it "can certainly enrich the language learning experience of our students" (Lungu 2013: 471). Moreover, as argued by Nagy, in the future, "the traditional face-to-face communication in the language classroom must be combined or blended with distant, Internet-mediated learning" (2019: 135), which has now become a reality.

Yalçinkaya finds that the blended-learning approach combines "the advantages of e-learning and traditional learning (classroom teaching). The flexibility of e-learning is linked with the social component of face-to-face teaching" (2015: 1062), which is especially suitable for younger net generations that have grown up in the contemporary digital world. Therein Clark's (2020) approach to teaching/learning comprising four components is very typical: 1) the highly controlled receptive instruction, 2) behavioural instruction focussing on gradual skill development, 3) the situated guided discovery approach, which is based on constructivism and social constructivism approaches to learning, and 4) exploratory instruction ensuring high learner control. With respect to language teaching/learning, Yalçinkaya (2015) considers that the receptive stage means the informal acquisition of the material, the behavioural or directive stage strengthens the learners' response, knowledge is constructed in the guided discovery stage, and during the exploratory stage of learning learners are exposed to real-world tasks and resources. Hampel (2006) also highlights the role of meaningful activities that are closely connected to learners' actual communicative needs and have a real-world outcome such as solving some actual problem, reaching a compromise in a problem-based discussion, solving a puzzle, etc.

The above-mentioned approach uses the regular way of content design in language teaching, comprising warm-up tasks (introduction), the task (the new material covered), comprehension tasks (checking learners' skill development),

and post-tasks (the phase of strengthening learners' language skills). However, nowadays, learning outcomes are not only learning a language for everyday communication but also developing skills to apply the language for information search, analysing and synthesising the information, creative problem solving, and others. To attain these goals, tasks must be meaningful. According to Samuda and Bygate (2008), a task should be a holistic activity enabling learners to use a language in solving a non-linguistic outcome. Their approach coincides with that of Hampel (2006) mentioned above. In other words, language is a tool used for obtaining information and developing other 21st-century skills.

Parallels can be drawn with task-based learning, the framework of which – as indicated by Masuram and Sripada (2020) – comprises three main phases: 1) pre-task, 2) task cycle consisting of task, planning, and report, and 3) post-task stage.

The same structure has been observed throughout all the modules of the target course as well. Each module is a story that has an introduction, the main part, and a conclusion. Various language tasks are incorporated in the module, but each of them is created containing the same three-stage structure. This kind of approach not only ensures the three stages of presenting the material but also contributes to active and exciting learning. Learners read the background and the introduction to the situation and are curious to see how the story continues and how it will end. It is crucial because in online learning the quality of learning activities is more significant than the time spent on doing the module. Therefore, "resources should excel in clarity and relevance; activities should promote active learning and interaction" (McNaught–Lam–Cheng 2012: 284).

As the aim of any language learning involves the development of both receptive and productive skills, it is essential to choose the most appropriate mode of learning for each of them. Buran and Evseeva (2015) argue that the development of receptive skills should form the online learning component, whereas productive skills should be developed in face-to-face classes. However, productive skills may also be developed in the online phase of blended learning by doing guided writing tasks.

## Learning vocabulary

A crucial element of foreign language learning is vocabulary, as all language skills are based on vocabulary (Jia–Chen–Ding–Ruan 2012). Vocabulary learning comprises both developing receptive knowledge, which is acquired through listening and reading, and productive knowledge acquired through speaking and writing (Schmitt 2000). Vocabulary learning and grammar are part of language use, and according to the paradigm shift in language learning: "language use activities should be embedded in the activities of the skills", which means that

they "should be linked to the specific skill they refer to, and in a later stage, they could be completely integrated in the used skill" (Krajcso–Frimmel 2017: 12). Thus, vocabulary is acquired in a complex way, and it is closely related to the given context. Traditionally, vocabulary tasks include true/false, matching, multiple-choice questions, gap filling, and answers to the questions. They can be divided into two groups – selecting and filling. According to Jia, Chen, Ding, and Ruan (2012), selecting and matching tasks correspond to recognition activities while filling to the recall activities. In line with constructivism theory, recalling tasks are more useful than recognition ones as they involve learners' personal experiences and thus ensure more personalized and meaningful learning. Therefore, recall activities should be incorporated in a blended-learning course. In turn, Ou Yang and Wen-Chi (2015) claim that a list of vocabulary learning strategies, such as word card strategy (using e-dictionaries or web dictionaries in learning words), synonym and antonym strategy (using online sources for word lists), imagery strategy (using visual images to represent words), grouping strategy (grouping vocabulary in semantic fields such as topics, categories, and scenes), are applicable to online learning stages as well. Lu and Chang (2016) offer a similar approach suggesting grouping vocabulary in semantic sets (synonyms, antonyms), communicative sets (according to authentic conversation situation important for interpersonal relationship), and situational sets (using the context or situation wherein words are grouped in clusters).

## Developing reading skills

Considering reading skills, learners use online reading strategies that differ from traditional reading strategies for printed text. Li (2020) claims that learners often face challenges of selecting and evaluating the texts when reading online sources, as these sources contain hyperlinks leading to other materials, which makes the material very extensive, and learners have to apply information processing, analysis, and synthesis skills all the time. However, hyperlinks may be used to create links between separate articles, thus ensuring a consistent and systematic approach to language learning by creating relationships between the material acquired and the new material (Shishkovskaya–Bakalo–Grigoryev 2015), which helps enhance the already developed language skills.

In practice, creating the material for reading has several challenges. Firstly, the suitability of the content and language level of the selected text. In most cases, it might be necessary to adapt the text to the target group. Secondly, the hyperlinks provided to online sources for additional reading may change in the course of the time, and the information will not be available there anymore. Therefore, it is recommended to include several links to additional information. Moreover, tasks

should be designed in such a way that learners are able to do them even if some of the additional links have stopped working.

## Developing speaking skills

Lackman (2010) identifies the following speaking sub-skills: fluency, accuracy with words and pronunciation, using functions, appropriacy, turn-taking skills, relevant length, responding and initiating, repair and repetition, range of words and grammar, and discourse markers.

Traditionally, speaking skills are developed in face-to-face classrooms. In the blended-learning approach, they can be developed in the classroom and through online interaction on chats and forums. Role-plays, simulations, webquests, project work, case studies, brainstorming, picture description, and visualization are some of the examples of tasks included in the target course. Language games are also useful in developing speaking and listening skills and in increasing learners' vocabulary. However, online language games have to match certain criteria to best fulfil their function. Based on an empirical research involving 100 language learners, Yip and Kwan (2006) conclude that online learning games have to ensure interaction with others, include audio-visual effects, provide the ability to select various roles, have a clearly defined scenario, and in order to sustain learners' motivation a balance between challenge and satisfaction should be observed.

Additionally, such language learning tasks as argumentation, role-plays, videoconferencing, collaborative and cooperative tasks further learners' interaction (Fandiño–Velandia 2020). The target course adopts most of these activities. Some of the challenges concerning speaking tasks are connected with managing group work and pair work in an online phase. The teacher's presence and constant monitoring of the pedagogical process is necessary, wherefore it will be complicated, hardly possible to apply these activities on autonomous online learning. They are more useful for an organized and managed study process both in face-to-face and online phases.

## Developing writing skills

As mentioned above, writing skills are productive skills. Hence, it is essential to involve learners in producing some definite output such as e-mails, letters, postcards, posters, etc. If writing e-mails and letters seem an ordinary activity, using listservs may be practised online, and it may motivate learners' participation in writing activities. As explained by Erben, Ban, and Castañeda (2009: 122): "listservs allow a group of people with a common interest to join and participate

in an organized moderated email discussion group. A listserv is created with readily available software programs. Once the listserv has been established, users send an email to the listserv address and all members of that list receive an email in their inbox." Similarly, learners can use writeboards – "a web-based space that can be shared in collaborative projects, or edited by individual writers" (Erben–Ban–Castañeda 2009: 132). Their advantage lies in the fact that learners can collaborate on creating a joint project. Learners develop their writing skills and collaboration and team working skills as well. Another option is the use of various chats and forums initiated by both learners and teachers. For technologically more savvy learners, it is possible to include wikis in the course. "A wiki is a collaborative website that many people can work on and edit" (Erben–Ban–Castañeda 2009: 133). Wikis ensure student-centred learning, and they are in line with the constructivist learning paradigm, as learners create their own content, and they have absolute control over the content created. A simpler writing task is a blog in which learners express their point of view on some topical issue and upload it on the webpage. Erben, Ban, and Castañeda (2009) divide blogs into the following groups: 1) vlogs – comprising videos, 2) linklogs – comprising links, 3) sketchlogs – comprising sketches, and 4) photoblogs or photo logs (flogs) – comprising photos. All of them may be applicable to language teaching/learning. What is more, in the next step, they may be linked with a speaking activity, thus securing the development of two productive language skills – writing and speaking. Writing e-mails, blogs, postcards, letters, etc. are some of the tasks used in the target course as well. However, the challenges address the following aspects: the topic must be significant to learners, clear guidelines are required, and learners might need more guidance with less traditional approaches such as wikis, listservs, vlogs, and flogs.

## Developing listening skills

The development of speaking skills is inseparable from listening skills. Traditionally, listening tasks comprise pre-task, or warm-up, the task, and the post-task. Listening is an essential component of the online part of the course. It comprises pre-recorded dialogues, monologues, and group discussions uploaded on the learning platform in the form of audio or video recordings. However, it is also possible to include links to existing podcasts, vodcasts, and audioblogs on the Web.

All in all, the question remains open as to whether to use authentic texts recorded by native speakers or the texts should be adapted and recorded by speakers of different nationalities, thus giving learners' an exposure to various pronunciations and accents. The first approach enables learners to experience

standard English pronunciation, whereas the second one prepares them for functioning in a multicultural environment. In the target course, the second approach has been selected.

## The learning environment

The online environment may "foster additional social interaction, through both synchronous and asynchronous communication" (Boelens–De Wever–Voet 2017: 7). What is more, it may be used to monitor the learning process and measure learners' success. According to previous studies, it "is often used to individualize the learning process" (Boelens–De Wever–Voet 2017: 12). Online projects involve learners in group work with diverse individuals, consequently enhancing the development of learners' collaboration and cooperation skills (Maulan–Raihan 2012). Moser, Wei, and Brenner find that "well-designed courses clarify learner expectations with regard to technological tools and skills as well as assignments. In addition, they rely on multiple tools to foster student learning, opportunities for interaction, and resources to guide learners when they experience technological difficulties" (2021: 3). Consequently, the following practices are significant for successful language teaching online: building and supporting a community of learners through learning tasks, facilitating interaction, integrating synchronous and asynchronous oral and written experience exchange in online chatrooms and face-to-face sessions (Moser–Wei–Btenner 2021, Meskill–Anthony 2015). Previous research (Saeed–Yang–Sinnappan 2009) shows that: students prefer using both synchronous and asynchronous online communication; they are flexible and ready to use multiple communication channels; the choice of technologies depends on the learning styles; technologies positively impact their learning outcomes as well.

A further analysis will be provided in the subsequent sections of the article focussing on the development of learners' skills, the platform, and the course evaluation.

## Research methodology

*The aim of this research* is to evaluate the target course created and the development of adult learners' English language competence during the course implementation in six EU countries.

***Research question***: Can the target course be used to successfully develop adult learners' English language competence, and what improvements are required therein?

***Research design***: The research applies a concurrent mixed-methods research design, which is "typically used when the quantitative and qualitative approaches provide complementary information that will enable a more complete, or a more accurate, account of the phenomenon of interest" (O'Hanlon 2019: 117), and it corresponds to the interpretivist paradigm.

***The sample*** of this study comprises ten English teachers from six partner countries, five having PhD degree, four master's degree, and one a bachelor's degree. Three teachers were from Romania, two from Latvia, two from Poland, and one English teacher from Slovenia, the Czech Republic, and Croatia. All of them were experienced in teaching adult learners of various target groups such as regular students, teachers, police officers, and adult learners requiring special educational treatment such as the unemployed, senior learners, those with learning barriers, etc. Their teaching experience ranged between 7 and 32 years.

***Research methods***: 1) data collection – learners' unstructured observation done by teachers, structured interviews with teachers, 2) mixed-methods data analysis strategies – data transformation and data comparison (O'Hanlon 2019) comprising the following steps: 1. coding of quantitative data, 2. creating the matrix for data analysis, 3. conducting descriptive and inferential statistics analysis of quantitative data, 4. coding qualitative data, 5. eliciting quotations/statements from qualitative data on the aspects analysed in the quantitative research, 6. making comparisons to elicit similarities (to confirm the quantitative results) and differences (to show all the spectrum of opinions). In the given research, as it is typical of concurrent mixed-methods research designs, data integration is done in the data analysis stage.

***Research process***: The interactive culture-based blended-learning language course comprises eighteen modules. Each learner studied one module (~20–30-hour input) independently and during class sessions from February to April 2019. Teachers monitored the process and provided support. 242 learners from Croatia, the Czech Republic, Latvia, Poland, Romania, and Slovenia started the course, and 227 completed it (for the results of students' survey, cf. Luka 2019). The reasons for dropping out: illness, change of university, conflicting work schedules, too difficult. After completing the course, learners filled in a face-to-face feedback questionnaire. Teachers observed learners during the whole study process, took notes on each learners' progress (learners' success, problems, overall comments, final evaluation), and filled in the evaluation form (27 five-point Likert scale questions and one open question).

## Findings. The course

The *European Cultural Heritage and Skills Development Course* is a blended-learning course applying CLIL (Content and Language Integrated Learning) methodology, the content of which is related to the rich intangible European cultural heritage of the partner countries. It is presented in the form of a story/script, applying innovative methodologies and tools (webquests, case studies, vialogues, videos, audios, design thinking tools, interactive games, etc.) aiming to increase learners' cultural knowledge, develop their twenty-first-century key skills (collaboration, communication, initiative, creativity, analytical reasoning, problem solving, etc.), and improve learners' English language competence.

In total, there are eighteen modules, three of which on the intangible cultural heritage of each partner country – customs, games, knowledge and skills, cultural spaces, language and oral traditions, performing arts, traditional crafts, and others. The topics are versatile, which enabled creating various kinds of tasks – reading, listening, audio, video, speaking, interactive games, face-to-face, etc.

Each module starts with a warm-up – introduction into the situation that explains the context (situation). The task type depends on the story of the module: matching, gap filling, video, audio, discussion, project work, interactive game, pair work, role-play, etc. The main part comprises online and face-to-face tasks. Their proportion is 30-40% face-to-face and 60-70% online tasks. Learners are guided step by step through the scenarios, and by doing certain tasks (video and audio tasks, interactive on-line games, lexical, reading, writing, grammar tasks, creative tasks – webquests, case studies, problem-solving discussions, project work, etc., and applying design thinking tools such as collabs, visualization, journey mapping, mind mapping, etc.) (cf. Luka 2018) they reach the end of the story, which either gives a solution to the situation or has an open ending to stimulate further discussion on the topic. As mentioned above, out of the 242 learners who started the course, 227 finished it. The information on the learners and the modules studied is summarized in *Table 1*.

**Table 1.** *Modules and learners by partner country*

| The module | Learners (n) | Learners (%) | Learners' country |
|---|---|---|---|
| To be proud of our Dubrovnik's patron saint: St Blaise (HR) | 10 | 4.4 | the Czech Republic |
| Sinjska alka – connection between the past and the present (HR) | 13 | 5.7 | Latvia |
| Gingerbread craft from Northern Croatia (HR) | 10 | 4.4 | Poland |
| How I met the falcons (CZ) | 10 | 4.4 | Latvia |
| The hand puppet's tale (CZ) | 10 | 4.4 | Poland |

| The module | Learners (n) | Learners (%) | Learners' country |
|---|---|---|---|
| An unforgettable weekend in Studnice (CZ) | 14 | 6.2 | Croatia |
| Autumn and winter traditions and festivals in Latvia (LV) | 11 | 4.8 | Poland |
| Authentic Suiti and Līvi cultural spaces in Latvia (LV) | 13 | 5.7 | Romania |
| Latvian signs and ornaments (LV) | 11 | 4.8 | the Czech Republic |
| Christmas in Poland (PL) | 11 | 4.8 | the Czech Republic |
| Post-war and post-communist heritage in Poland (PL) | 10 | 4.4 | Latvia |
| Local craft and handwork (PL) | 10 | 4.4 | Slovenia |
| The Whitsunday pilgrimage of Şumuleu Ciuc (RO) | 16 | 7.0 | Croatia |
| Christmas carols and New Year wishes in Transylvania (RO) | 23 | 10.1 | Slovenia |
| Lad's dances from Romania (RO) | 23 | 10.1 | Slovenia |
| Martin Krpan, a hero and a smuggler (Sl) | 10 | 4.4 | Croatia |
| Martin Krpan, a hero and a horse owner (Sl) | 12 | 5.3 | Romania |
| Door-to-door rounds of kurenti (Sl) | 10 | 4.4 | Romania |
| **18 modules** | **227** | **100** | **6 countries** |

A summary of all the modules is included in the course curriculum (Luka 2018), and the modules are available on the learning platform: http://e-culture.eu/.

## The learning platform

All the teachers positively evaluated the learning platform (M = 4.00–4.55; Mo = 4.00; 5.00). Moreover, the qualitative data obtained from learners' observations confirm the quantitative findings.

There were no significant differences discovered in terms of the module studied (Asymp. Sig. = 0.454), but there were significant differences found as to some variables concerning teachers' countries: "found the platform interactive and creative" (Asymp. Sig. = 0.045), "found the platform well structured" (Asymp. Sig. = 0.033), "found it easy to find the information" (Asym. Sig. = 0.022) and "found it easy to explain it to learners" (Asymp. Sig. = 0.039). The findings indicate that the English teachers from the Czech Republic and Romania found the platform more interactive and creative than their peers from other countries (Mean Rank

= 15.50 and 12.50 vs. 6.50 and 9.50). For example, the Czech teacher indicates that: "Learner 6 is very positive about the module and the user-friendly platform design. She would suggest the course to other learners as well". The Czech teacher found the platform better structured (Mean Rank = 15.50) and easier to search for information (Mean Rank = 16.50), whereas the Polish teachers assigned a lower score to these aspects (Mean Rank = 3.50 and 3.83 respectively). In turn, Latvian teachers found it more difficult than their peers to explain the platform to the learners (Mean Rank = 3.67 vs. 6.00, 8.33, and 13.00). The following comments confirm this finding: "The student experienced problems in understanding how the platform works and how to find the information online" (Learner 1 from LV), "The student could understand the tasks with some help from the lecturer, but it took him quite long to find answers" (Learner 3 from LV), and "The student could understand and complete the tasks with a lot of help from the lecturer. He dropped out and did not complete all the online tasks of the module" (Learner 10 from LV).

These results indicate that the teacher's support is vital in blended learning, and teachers must be proficient in using technologies, which is another course-related challenge. Although the course contains 60-70% of online tasks, it is more suitable to guided learning than autonomous learning. Furthermore, some teachers might need IT support or even some teaching in digital skills prior to the course delivery.

## The modules

Concerning the modules created, the teachers evaluated them highly as well (M = 3.44–4.50; Mo = 4.00; 5.00). They admitted that overall the modules are suitable for adult learners (M = 4.50; Mo = 4.00; 5.00), where 50% of teachers "strongly agreed" and 50% "agreed" with the statement. They substantiate their opinion with answers to other questions, where the overall evaluation is positive (M = 3.44–4.50; Mo = 4.00; 5.00). *Figure 1* summarizes the evaluation of the modules given by the teachers.

The highest evaluation is given to the following variables: "online tasks are interesting for adult learners" (M = 4.50; Mo = 4.00; 5.00), "learners learnt new information about the topic" (M = 4.50; Mo = 4.00; 5.00), and "the story is interesting for adult learners" (M = 4.27; Mo = 4.00).

The teachers observed that the learners liked the course idea and most of the modules. They liked the idea of learning a language through other cultures most of all. Thus, a learner from the Czech Republic admitted that "it's a unique project, which teaches both language and history of other nations" (Learner 3 from CZ). Similar observations have been noted by other teachers: "He was interested in the cultural topic. He liked the tasks and said that he would try out other modules as

well" (Learner 4 from RO); "The learner was happy to find new information and looked for similarities between his own culture and the one in the module" (Learner 3 from RO); a learner from Croatia thinks that "learning about cultural heritage is important, and therefore he finds the platform very useful" (Learner 10 from HR).

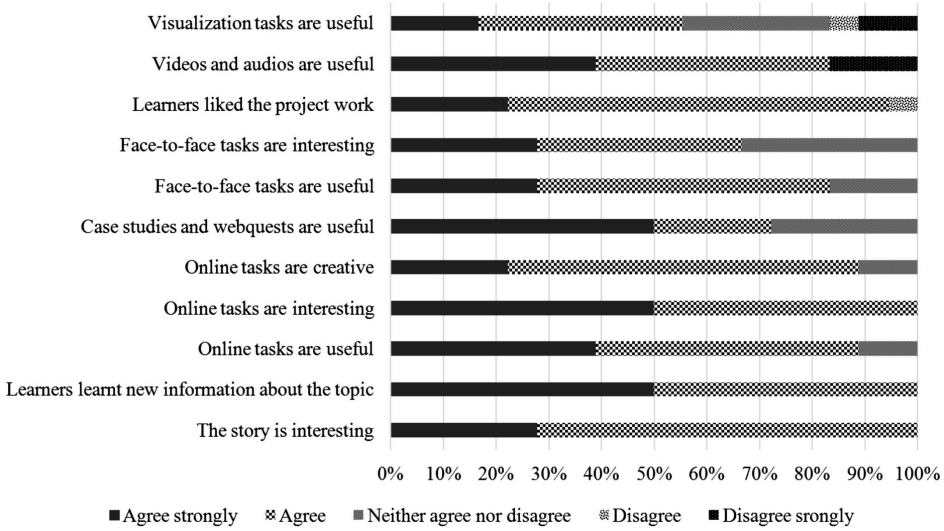


**Figure 1.** *Evaluation of the modules by teachers (%)*

In turn, the teachers do not find visualization tasks (M = 3.44; 4.00), videos, and audios (M = 3.88; Mo = 4.00) as useful as other tasks, although their evaluation is neutral – "neither agree nor disagree". They did not mention visualization tasks in their observation much, but the teachers admitted that some learners had found visualization tasks interesting – for example, Learner 8 from Croatia.

The third case scoring below 4.00 is for the variable "found face-to-face tasks interesting" (M = 3.94; Mo = 4.00), which might be explained by learners' readiness to interact with others. Significant differences were not discovered in terms of which of the modules were completed (Asymp. Sig. = 0.454), which means that the module evaluation is quite similar, and the results may be attributed to the whole course.

## Skills development

The evaluation concerning the adult learners' skills developed ranges from 3.33 to 4.55 (Mo = 3.00–5.00), and the distribution is quite similar between the language skills and other twenty-first-century skills: M = 3.38–4.33 (Mo = 4.00 and 3.00) for language skills and M = 3.33–4.55 (Mo = 5.00 and 3.00) for other skills.

*Figure 2* summarizes the means concerning the summative (outcome) evaluation. Formative (process) evaluation was done during the whole teaching/learning period, and teachers took notes on each learner's progress.

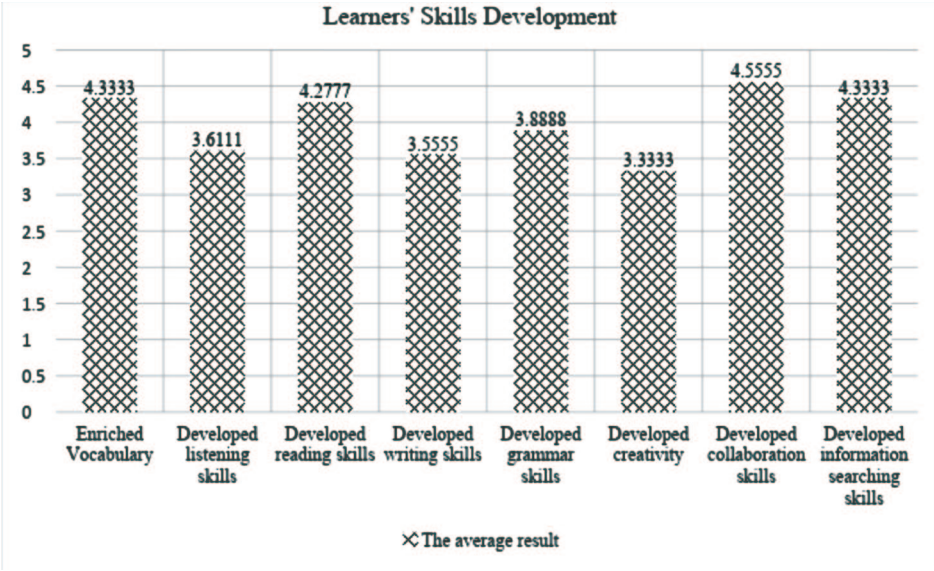


**Figure 2.** *Learners' skill development evaluated by the teachers (n = 5.00)*

The teachers recognized that the majority of learners had increased their vocabulary, a progress promoted by both online and face-to-face phases. Teachers' observations confirm this finding:

> She told me she had learned a lot of new words and liked the cultural topic. (Learner 1 from RO)

> She said the module had been fun. She particularly liked the crosswords and affirmed that she had learned a lot of new words. (Learner 6 from RO)

> The learner enjoyed acquiring new cultural information from this submodule. He learnt new vocabulary while performing the tasks. He especially liked the case study and the webquest and found them inspiring. (Learner 6 from PL).

> Reading skills were the second most developed language skill, but some of the reading tasks caused problems to learners as they "were too complicated" (Learner 3 from LV) and "longer than expected". (Learner 5 from RO)

Although teachers considered that learners had developed their writing skills (e.g. learners 1, 3, and 4 from CZ, Learner 6 from LV, Learner 1 from HR), it is evident that they were not specifically fond of doing writing tasks. This may be attributed both to the tasks in which learners had to take notes and then discuss it with their groupmates (e.g. learners 1 and 2 from Sl, Learner 9 from HR) and to the content which they did not find interesting (e.g. Learner 1 from HR). The English teacher from Slovenia summarizes the possible reasons for this:

> The students didn't enjoy the writing task because they had to write about a specific event. For most of the students, writing a blog is not a problem as such; some of them have their own websites, writing blogs about different topics. The problem was the event – if they could have chosen a dance or music festival of their own, it would have been more interesting for them. Nevertheless, I think for adult learners this task will be very interesting – most of them are not familiar with online blogs, so this will be quite interesting, and specific instructions will help them to do the task.

Similar to the module evaluation, significant differences were not observed in terms of the module studied (Asymp. Sig. = 0.454). However, the findings showed significant differences between the countries regarding all skill development (Asymp. Sig. = 0.004–0.036), except reading skills (Asymp. Sig. = 0.181). What is more, Croatia and Poland demonstrated lower skill development than other partners, which may be explained with their target audiences for the course. Teachers' education level did not affect their decision since no significant differences were found therein (Asym. Sig. = 0.132–0.713).

The findings point to correlations between skill development and the platform evaluation and skill development and the task type. The strongest correlation has been observed between skill development and the interactivity of the platform and the platform structure and the information layout on the platform (see *Table 2*).

**Table 2.** *Correlations between skill development and the learning platform*

| | | Learners learnt some vocabulary on the topic | Learners developed their | | | | |
|---|---|---|---|---|---|---|---|
| | | | listening skills | reading skills | writing skills | grammar skills | creativity while doing the module |
| Found the platform visually appealing | Correlation Coefficient | .065 | .296 | .151 | .452 | .477* | .096 |
| | Sig. (2-tailed) | .797 | .232 | .550 | .060 | .045 | .704 |
| | N | 18 | 18 | 18 | 18 | 18 | 18 |
| Found the platform interactive, creative | Correlation Coefficient | .750** | .784** | .614** | .754** | .556* | .681** |
| | Sig. (2-tailed) | .000 | .000 | .007 | .000 | .017 | .002 |
| | N | 18 | 18 | 18 | 18 | 18 | 18 |

| | | Learners learnt some vocabulary on the topic | Learners developed their | | | | |
|---|---|---|---|---|---|---|---|
| | | | listening skills | reading skills | writing skills | grammar skills | creativity while doing the module |
| Found the platform well structured | Correlation Coefficient | .714** | .859** | .591** | .850** | .691** | .614** |
| | Sig. (2-tailed) | .001 | .000 | .010 | .000 | .001 | .007 |
| | N | 18 | 18 | 18 | 18 | 18 | 18 |
| Found it easy to find the information | Correlation Coefficient | .709** | .812** | .545* | .825** | .633** | .523* |
| | Sig. (2-tailed) | .001 | .000 | .019 | .000 | .005a | .026 |
| | N | 18 | 18 | 18 | 18 | 18 | 18 |

Notes: Strong correlations are marked in dark grey and the moderate ones in light grey.
** Correlation is significant at the 0.01 level (2-tailed)
* Correlation is significant at the 0.05 level (2-tailed).

Strong and moderate correlations were found also considering skill development and the tasks. However, more correlations were found regarding the development of learners' creativity than English language skills. The following cases showed strong positive correlations: 1) the use of case studies and webquests and the development of learners' creativity ($r_s = 0.819$, Sig. 2-tailed = 0.000); 2) the usefulness of face-to-face tasks and the development of learners' creativity ($r_s = 0.757$, Sig. 2-tailed = 0.000); 3) the degree to which face-to-face tasks were interesting and the development of learners' creativity ($r_s = 0.723$, Sig. 2-tailed = 0.001). Furthermore, moderate positive correlations were found between: 1) the usefulness of on-line tasks and the development of learners' creativity ($r_s = 0.562$, Sig. 2-tailed = 0.015); 2) the creativity of on-line tasks and the development of learners' creativity ($r_s = 0.557$, Sig. 2-tailed = 0.016); 3) the usefulness of audio and video tasks and the development of learners' creativity ($r_s = 0.627$, Sig. 2-tailed = 0.005).

As to the development of language skills, correlations were found between the development of all language skills and vocabulary acquisition and between the development of language skills and the usefulness and creativity of online tasks, wherein all of them showed moderate correlations ($r_s = 0.491$–$0.628$, Sig. 2-tailed = 0.0009–0.048), but the development of listening and writing skills showed strong correlations ($r_s = 0.837$, Sig. 2-tailed = 0.000 and $r_s = 0.876$, Sig. 2-tailed = 0.000 respectively), which proves the claim that online tasks "can help students to improve their key language skills, particularly the skills of listening, reading, and writing" (Klimova–Kacetl 2015).

The conducted Cronbach's alpha validity and reliability analysis shows a good internal consistency between the issues under investigation and a very high validity ($\alpha = 0.939$) as well as very high data reliability ($s = 0.931$–$0.942$).

## Discussion

As it is evident from the research findings, the given blended-learning course has contributed to the development of learners' language and digital skills. Learners liked the learning platform and the tasks, and they found that "it's a good way to learn and train IT skills" (Learner 1 from Sl) and develop "collaboration and information searching skills" (Learner 1 from LV). Similar results were obtained in a study conducted in Russia (Buran–Evseeva 2015), where a survey of 100 teachers and 550 students indicated advantages of blended learning contributing to the development of learners' language competence and relevant twenty-first-century skills such as students' online research skills, reading, writing, and listening skills, as well as increased students' motivation.

Although the research findings showed the learners' skill development, overall, teachers' observations pointed to a greater development in learners' reading skills and vocabulary enrichment than in their writing and listening skills. This partly coincides with the previous research in the field, which – similarly to the current research – observed the enrichment of learners' vocabulary (Lai–Li 2011, Lungu 2013) and the development of learners' reading skills (Klimova–Kacetl 2015), but it also pointed to a considerable development of learners' writing skills (Lai–Li 2011, Klimova–Kacetl 2015, Miyazoe–Anderson 2012), whereas in the current research the development of writing skills was observed for part of the learners only. The approach of the "objective-focused online writing model" comprising forums for discussion, blogs for reflection, and wikis for collaboration accompanied with online writing tasks have facilitated the language acquisition of English learners in Japan (Miyazoe–Anderson 2012: 151). Such an approach could also be integrated in the current course to make it more creative and bring it closer to the younger generation's learning patterns.

Games and interactivity are important teaching/learning elements to make learning more attractive and playful. The research conducted in Hungary pointed to students' preference of doing text comprehension exercises, creative and playful tasks such as word puzzles and others (Sántha-Malomsoki–Sántha 2019). Similarly, the current research also showed that learners were especially interested in doing quizzes and word puzzles.

Finally, the findings confirm the opinion expressed by several scholars (Moser–Wei–Btenner 2021; Meskill–Anthony 2015) that the learning system is very important in attaining learning outcomes, and therefore "it is appropriate to present information and methodological support as a system composed of three subsystems: 1) content; 2) software; 3) methodology" (Matukhin–Zhitkova 2015: 185). This was evident both from the evaluation of the learning platform as well as from learners' observations mentioned above. Moreover, teachers play a significant role in providing consultancy on the content, task requirements, and

technological issues. As emphasized by Fandiño and Velandia (2020), efficient learners' guidance provided by teachers makes the language learning process more successful and increases learners' motivation to learn English online.

## Conclusions

In the current education scenario worldwide, including adult learning, when traditional face-to-face learning is restricted due to the COVID-19 pandemic, online and blended learning formats have become especially significant. In such a context, blended learning enables adapting to these restrictions, and the face-to-face stage is implemented on an online environment. Furthermore, communication contexts are changing. Much of the communication is transferred to an online environment, which requires highly developed language competences and digital skills.

Considering this, the current course may be a viable solution since language learning is embedded in a cultural context, and, while obtaining new information on European cultural heritage, learners develop their English language skills, intercultural competence, information searching skills, and collaboration. Depending on the learning outcomes envisaged by the English language syllabus as well as the target audience, the given course may be used for 1) creating a topical syllabus, which could be especially useful for students of cultural education institutions or curricula in the field of arts and culture or 2) selected course modules or submodules may be integrated in the existing institutional English language syllabus. However, it has to be emphasized that in both options students have to do all the submodule – from introduction to the end. Concerning non-formal adult education, language course organizers may use the syllabus worked out by the project team, which is uploaded on the learning platform at: http://e-culture.eu/.

The research findings showed the development of learners' English language competence, and most of the learners enjoyed the course; consequently, it may be used for developing adult learners' English language skills. However, some improvements concerning listening and writing tasks should be made to ensure their greater development. Targeted writing tasks aimed at the learners' specific needs may be applied therein.

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# Virolinguistics: Introduction to the Study of the Coronavirus Language[1]

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**Abstract.** This paper undertakes the introduction to virolinguistics, a new linguistic discipline that investigates the virus language (virolect) based on the Hungarian linguistic material drawn from the scientific literature and our own collection. The goal of this work is to evaluate the effect of the pandemic on certain aspects of the Hungarian language: genres, vocabulary, communication, the linguistic landscape, and social media. The linguistic materials of these various areas play an important role in our society: they have a warning, entertaining, or stress-relieving function. Due to the restrictions, most studies have moved to the Internet. The methodological paradox of virolinguistics can be identified in the fact that it disregards certain scientific standards in order to assist linguists in collecting their valuable linguistic and visual materials.

**Keywords:** coronavirus, pandemic, vocabulary, linguistic landscape, Internet memes

## Introduction

The goal of this paper is the theoretical and methodological introduction to virolinguistics, a new linguistic discipline based on the effects of the pandemic on the Hungarian language[2] (and its use in communication). The demand for outlining

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2 In addition, not just the Hungarian language but many other languages have experienced similar changes as well.

virolinguistics as an area of research has arisen already during the first wave of the pandemic (Istók–Lőrincz 2020),[3] but methodological and terminological recommendations and a detailed elaboration of the concept had yet to present themselves. Linguistics, literary theory, and ethnography have all reacted to the effects of the pandemic on communication and linguistics almost immediately. New communicational and cultural genres (H. Nagy 2020), words and phrases (Alyeksyeyeva–Chaiuk–Galitska 2020, Dobrík 2020, Ďuricová 2020, Roig-Marín 2020, Veszelszki 2020a, Uricska 2021), forms of verbal communication (Domonkosi 2020, Domonkosi–Ludányi 2020a, 2020b), and captions warning about the dangers of the virus (Štefaňáková 2020) have appeared all around the world. The effect of the pandemic on communication and languages is so significant that currently a distinct linguistic variation created by COVID-19 can be identified: "Socio-historical and socio-psychological events always have a linguistic point. Linguists believe that confinement into one's home results in an internal language version in a relatively short time, which appears primarily in pronunciation, in word usage and in word creation (neologisms), but it can also result in grammatical change" (Balázs 2020a: 229). Terms reflecting this phenomenon are a proof of this: *Coronaspeak* (Alyeksyeyeva–Chaiuk–Galitska 2020), *"Newspeak" of the quarantine era* (Temirgazina–Luczyk 2020), *karanténnyelv* 'quarantine language' (Balázs 2020a, 2020b), *járványnyelv* 'pandemic language' (Haitzmann 2020), *vírusnyelv* 'virus language' (Istók–Lőrincz 2020). Virolinguistics as a concept is an invention of the authors of the present paper, an umbrella term denoting the linguistic discipline analysing the virolect. Virolinguistics can be seen as a heterogeneous, general linguistic discipline that enables the discourse between linguistic branches that might seem distant at first glance but are identical in their themes (focused on the virus). The function of virolinguistics can be identified in the documentation and analysis of verbal and visual materials pointing to the dangers of the virus (warning function, e.g. captions warning about the dangers of the virus) and in the analysis (e.g. Internet memes) of verbal and visual pieces lampooning the situation (entertaining and stress-relieving function; Istók–Lőrincz 2020).

## 1. Methodological aspects (the paradox of virolinguistics)

The virus language is changing so quickly that researchers need to react to new linguistic phenomena immediately (they need to document them) lest they miss out on them, with no second chances after the end of the pandemic (hapax legomena and occasionalisms that appear on social media platforms disappear,

3 The present English study is an extended continuation of the authors' paper written in Hungarian, published in 2020, with new example material.

captions posted in public spaces are replaced by new ones, etc.). Due to the speed of the whole process, its distinct phases are difficult to reconstruct ex post; they become blurred, while the direction of the following linguistic innovations cannot be foreseen either. To get a full picture of the virolect, it is imperative to perform as much synchronic research as possible.

The necessity of synchronic research leads to a looser adherence to methodological aspects. It is a paradox of virolinguistics that if we insist on scientific aspects in a strict manner, we have to wait until the easing of the restrictions, that is, the end of the pandemic. However, the majority of the corpus intended for analysis will become obsolete or, in a worse scenario, unavailable. Below we will enlist the most frequent examples:

1. Due to the lack of physical presence, most studies move to online platforms: paper-based surveys are replaced by online surveys, also interviews can only be conducted online (and not in a natural manner, which can affect the answers given by the subject).

2. Since the exploration of the virus vocabulary happens in real time, virus dictionaries have to let go of objective frequency indicators (cf. Veszelszki 2020a, Uricska 2021).

3. Although the visual use of verbal communication (virolinguistic landscape) can be documented, one can only hypothesise on the motivations behind these instances of communication. Since a number of institutions and shops are closed (Slovakia), there is no way to conduct (recorded) interviews. The researcher remains in solitude.

## 2. Virus genres

Quarantine culture is forming new communicational and cultural genres and is redefining existing ones. Some of the most popular genres are posts about the virus (virus post or virus comment), the virus diary, the virus poem, and the virus painting. Since we move a significant share of our actual physical activities, such as communication, work, recreation, and playing games, into the virtual realm, one may claim that new and redefined genres are also emerging in a kind of "digital quarantine". From a linguistic standpoint, it can be ascertained that popular texts can be characterized by their conciseness, ease of comprehension ("microgenres"), and powerful visual representation (e.g. the use of images, photos, metaphors).

Péter H. Nagy (2020: 24–25) highlights the hybrid nature of the new genres: among the characteristic traits of these genres, he mentions up-to-datedness, reflection on scientific findings, directness that alleviates the seriousness of the subject, the aim for self-deprecation, and conciseness. He also points to the social

utility of the new genres: "This had a radical contribution to the mitigation of the panic caused by the coronavirus and the social channelling of accumulated energy" (H. Nagy 2020: 25).[4] The genres connected to the coronavirus can be put into two larger categories: (1) informative and misleading genres (e.g. news about the virus, fake news, personal accounts); (2) entertaining (stress-relieving) genres (e.g. coronavirus memes, quarantine songs, quarantine videos). The tone suggests seriousness in the former, playfulness in the latter case.

In his speech given at the *Munich Security Conference* (15 February 2020), the Director-General of The World Health Organization (WHO) called attention to the fight against fake news: "we're not just fighting an epidemic; we're fighting an infodemic. Fake news spreads faster and more easily than this virus, and is just as dangerous" (W1). The lexeme *infodemic* was formed by the merger of the words *information* and *epidemic* or *pandemic*, denoting the spread of disinformation, which is difficult or impossible to regulate (Uricska 2021: 51). The fake news about the coronavirus (on its emergence, existence, handling, cf. Falyuna 2020, Islam et al. 2020) differ from other fake news because the novelty of the topic and the lack of experience with it make it difficult to ascertain the veracity of their content (especially due to the fragments of truth they contain). Their exposure can be made easier by identifying certain linguistic signs (e.g. the name of the website, clickbait title, substandard grammar and vocabulary).

## 3. Virologisms (new words, phrases)

In just a year, thousands of new words and phrases related to the pandemic have appeared in both the Hungarian and the English language. There has hardly been any example for such an expansion of the Hungarian vocabulary (cf. Veszelszki 2020a) since the Hungarian Language Reform (18th and 19th centuries). The reason for this is that the magnitude of social change influences the magnitude of linguistic change as well: new phenomena necessitate new lexemes. A virus dictionary published this year explains this phenomenon the following way: "People invent new concepts for phenomena and events for which they had no concepts before. This has happened in relation to the pandemic, too. We have complied new as well as well-known words used in this new context" (Uricska 2021: 10).

A standard scientific documentation of Hungarian lexemes was performed by Ágnes Veszelszki (2020a) and by Erna Uricska (2021) for the English ones. Veszelszki collected 400 Hungarian while Uricska 403 English words and phrases from the virus language during the first wave of the pandemic. The titles of the two dictionaries carry metalinguistic information regarding the two

4 Translated by the authors of this paper. In the following sections, unless indicated otherwise, all translations from Hungarian belong to the authors.

most popular types of word formation observed in the virus language: they point to compounding (*Karanténszótár* 'Quarantine dictionary') and portmanteaus (*COVIDictionary*).

Neither of the authors consider their dictionary a terminological one. Veszelszki considers hers an "epidemiological and historical account" (2020a: 7), while Uricska refers to hers as *covidocs* (2021: 10). *Covidocs* can be considered a new genre of dictionaries: it dismisses objective frequency indicators (see the chapter on the paradox of virolinguistics above). Instead of presenting statistics and linguistic information, it becomes easily comprehensible to the general public thanks to its readable style, suitable even for continuous reading (which cannot be said of terminological dictionaries). Data collection can happen with the help of questionnaires or through the systematic reading of articles from the media (Uricska only applies the former, while Veszelszki uses both approaches).

The new words and phrases associated with the coronavirus are denoted by the term *coroneologism* both by Veszelszki (2020a: 9, 48) and Roig-Marín (2020) (probably independently from each other): the term points not only to the content of the lexemes but also to a popular type of word formation applied in their case, the portmanteau (*corona* + *neologism*). An alternative to the term *virus language neologism* can be the term *virologism* (Greek *virus* + *logos* 'word', invented by the authors of this paper: I. B. and L. G.), which is shorter than the above mentioned *coroneologism*: its advantage is that it can possibly stay in use to denote lexemes of the virus language that have lost their neological character (which is being perceived to be novel).

Although many virologisms are hapax legomena (one-time word formations) or occasionalisms (occasional word formation), their formation and spread can be supported by the fact that they are likely to appear in formal and informal texts equally: print and electronic media, but one can stumble upon them in comment sections of social media platforms as well. Veszelszki's dictionary (2020a) includes examples of lexemes from a wide range of styles and varieties: "from the vernacular and playful words that are borderline slang, through journalistic inventions, to medical terms that permeated colloquial language due to the pandemic, and vocabulary elements of the administrative language" (Veszelszki 2020: 7).

Veszelszki's (2020a) examples confirm that the most productive method of word formation is compounding (e.g. *fotelkonferencia* 'couch conference' 'a conference moved to an online platform'; *pánikvásárlás* 'panic shopping' 'panic shopping induced by the quarantine'; *vírusgeneráció* 'virus generation' 'the new generation affected by the experience of the pandemic'), while derivation is becoming less and less common (e.g. *cecíliás* 'Cecilia-like' 'someone talking like Cecília Müller, the Chief Medical Officer of Hungary, well known from the media'; *élesztőtlen* 'lacking yeast' 'someone who is out of yeast'; *karanténosítás* 'quarantining' 'putting traditional art pieces into a quarantine theme').

The first component of Hungarian composites is usually one of the following words: *karantén* 'quarantine', *korona* 'corona', *covid*, *oltás*, or *vakcina* 'covid or vaccine', or *virus* 'virus'. Some novel verbal examples from the webpage of *Új Szó*, a Hungarian daily newspaper in Slovakia (from articles published between November 2020 and January 2021):

(1) *karanténkötelezettség* 'quarantine obligation': *A brit kormány tavaly júliusban állította össze azoknak az országoknak a listáját, amelyekből karanténkötelezettség nélkül be lehet utazni az Egyesült Királyságba.* 'Last July, the government of the United Kingdom composed a list of countries which do not indicate mandatory quarantine on return to the United Kingdom.' (W2)

(2) *koronavírus-mutáció* 'coronavirus mutation': *Már Szlovákiában is megjelent a Nagy-Britanniából származó új koronavírus-mutáció* 'The new coronavirus variant from the United Kingdom has already appeared in Slovakia' (W3)

(3) *Covid-igazolvány* 'COVID passport': *Idén a Covid-igazolvány mentheti meg a turizmust* 'Tourism could be saved by COVID passports this year' (W4)

(4) *Covid-Pass* 'COVID-pass': *Covid-pass: A jövő útlevele?* 'COVID-pass, the passport of the future?' (W5)

(5) *oltóközpont* 'vaccination centre': *Hatalmas oltóközpont lesz a kaliforniai Disneylandben* 'A huge vaccination centre opens in the Californian Disneyland' (W6)

(6) *vakcinaprogram* 'vaccination programme': *Valóban lassú a szlovák vakcinaprogram?* 'Is it correct to claim that the vaccination programme in Slovakia is slow?' (W7)

(7) *vakcinaútlevél* 'vaccine passport': *Egyre több hír jelenik meg arról, hogy az újranyitást követően mind több ország, cég, légitársaság tervezi azt, hogy a turistákat csak akkor engedik az országba, szállodába, fedélzetre, ha azok rendelkeznek vakcinaútlevéllel (Covid-Pass), amely igazolja azt, hogy az érintett megkapta a koronavírus elleni oltást.* 'More and more news come to the surface claiming that after opening, more and more countries, companies, airlines plan to admit tourists into their territories, establishments, on their boards only if they possess a vaccine passport (COVID-pass), which proves that they have received the vaccine against the coronavirus.' (W8)

However, it must be mentioned that the utilization of word formation methods can differ across languages: e.g. the Slovak language prefers derivation over portmanteaus, which, conversely, are more common in the Hungarian language (for more information on this topic, cf. Misadová 2011: 64–69, Tóth 2017: 63–65), while even greater contrasts can be observed between other methods of word formation: e.g. portmanteaus are particularly popular in the English language, while the Hungarian language, which shunned it at first, is slowly getting used to it (the examples from the virus language seem to confirm this), and the Slovak language barely uses it. Thus, it is not surprising that Uricska's dictionary

(2020) includes a number of English portmanteaus (e.g. *homeference* 'a virtual conference from home' <*home* + *conference*; *coronacation* 'working or schooling from home' <*corona* + *vacation*; *covidiot* 'a person who ignores the rules of physical distancing' <*covid* + *idiot*). Based on Veszelszki's corpus (2020a), it can be confirmed that certain types of "rare methods of word formation" (Lengyel 2000) are becoming more frequent in Hungarian as well (Istók 2017, 2018: 53–60): portmanteau is also the most popular method (e.g. *karantéboly* 'frustration with the pandemic' <*karantén* 'quarantine' + *téboly* 'madness'; *koronapló* 'a diary written during the pandemic, usually about the pandemic' <*korona* 'corona' + *napló* 'diary', *covidinka* 'a person who is acting irresponsibly during the pandemic' <*covid* 'COVID' + *dinka* 'fool') among *affecters* (Istók 2017: 171) with a determined function of style.

Zsófia Ludányi (2020a, 2020b) points out a number of uncertainties in grammar and spelling when it comes to the expansion of the Hungarian vocabulary. In her opinion, the central problem is caused by the various acronyms regularly used as names for the coronavirus disease (e.g. *COVID-19*, *COVID–19*, *Covid-19*, *Covid19*) (Ludányi 2020b: 33). Based on the agreement between several institutions in Hungary, the accepted resolution is the following: the recommended spelling in texts intended for medical professionals and scientific use is COVID19, but the colloquial use is Covid19 (Ludányi 2020b: 34). Ludányi also mentions that the disease has not had a codified spelling in dictionaries. If the abovementioned recommendation is not followed, some grammatical error is made (Ludányi 2020b: 34).

Virologisms are worth analysing from the aspect of linguistic variability (cf. Lőrincz–Lőrincz 2020: 235–236) as well. For example, several names have come up in the Hungarian press in Slovakia for the document certifying a negative test result: *Covid-igazolvány* 'COVID-ID', *Covid-tanúsítvány* 'COVID certificate' (W4), *kék tanúsítvány* 'blue certificate', *őszi igazolás* 'autumn certificate' (W9), *oltási igazolvány* 'vaccination ID' (W10). The document certifying vaccination against the virus also has several names: *vakcinaútlevél* 'vaccine passport', *zöld útlevél* 'green passport', *Covid-Pass* 'COVID-pass' (W8). The majority of these can be categorized as a compounding or qualifier composition.

From time to time, linguistic variability poses questions regarding language cultivation and terminology as well. For one of the restrictions imposed to stop the pandemic, that is for keeping a 1.5–2 metre distance, the term *szociális távolságtartás* 'social distancing' (*sociálny odstup* in Slovak, *distanțare socială* in Romanian) has become widely used in English, Slovak, Romanian, Hungarian, etc. The World Health Organization (WHO) uses the term *physical distancing* instead: "We can stay socially connected while physically distant" (W14). In addition to physical distancing, Géza Balázs (2020c) recommends *emberek közötti távolságtartás* 'distancing between people', while *Magyar Nyelvi Szolgáltató*

*Iroda* (Manyszi, i.e. the Hungarian Language Service) proposes *udvariassági távolságtartás* 'polite distancing' (W11). In our day-to-day lives, we can encounter several variants of this term: *társas* 'social', *társadalmi* 'social', *társasági* 'social', *közösségi* 'public', etc. *távolságtartás* 'distancing'.

In formal and informal texts alike, the term *korona* 'corona', classified as an apocope, is becoming more common compared to the lexemes *koronavírus* 'coronavirus' and *koronavírus-járvány* 'coronavirus pandemic'; as a variant of the latter, the reduced term *koronajárvány* 'corona pandemic' can also occur. Obscurity can be observed in the definite meaning of the term *járvány(helyzet)* 'pandemic (situation)' in its alternative forms. The reason for this is that the terms *koronavírus* 'coronavirus', *korona* 'corona', *koronajárvány* 'corona pandemic', *vírus* 'virus', *koronavírus-járvány* 'coronavirus pandemic', *karantén* 'quarantine', and *covid* are used interchangeably in different contexts of the structure *[…] idején* 'during […]'.

## 4. New forms of interaction

Ágnes Domonkosi and Zsófia Ludányi were the first in the Hungarian scientific literature to notice the effect of the coronavirus pandemic on verbal interactions (Domonkosi–Ludányi 2020a, 2020b): good wishes have become more prominent and new greetings have emerged in e-mails (e.g. *Vigyázzunk egymásra!* 'Let's look out for each other!'; *Maradj otthon!* 'Stay at home!'; *Viselj maszkot!* 'Wear a mask!'). The authors have analysed 250 e-mails (formal or informal electronic mails received directly or forwarded from other people): "The results point to the existence of a social-distance-reducing strategy underlying varied patterns of construal. Social distance is offset, as it were, by linguistic means, distance being restricted to the spatial domain and solidarity taking central stage in language activity" (Domonkosi–Ludányi 2020a: 241). They also point out that while references to the coronavirus get an equally important role in the opening and closing segments in English e-mailing (cf. Kircher 2020), Hungarian e-mails mostly contain such references in their closing segments only (Domonkosi–Ludányi 2020a: 246–247).

The significance of verbal interaction in online education becomes heightened as well. A paper by Ágnes Domonkosi investigates the roles of social deixis in distance education (2020): "Social deixis, i.e. the use of T/V, address forms, greetings and operations for presenting persons in discourse play a key part in the organization of social relations. In digital interactions lacking personal presence, impression-making and face-creation have a stronger linguistic basis, with the result that acts of social deixis play an even more prominent role than in direct, personal communication" (Domonkosi 2020: 45). Digital education changes the utility of traditional linguistic functions, the phatic (communicative), metalingual (linguistic) and conative (vocative) ones called by Roman Jakobson (1960) are

gaining a greater role (e.g. *Jól látnak? Jól hallanak?* 'Can you see me well? Can you hear me well?'; *Jól hallottam? Azt mondta, hogy…?* 'Did I hear you correctly? Did you say…?'; *Kapcsolják be a mikrofont, hogy halljam, amit mondanak!* 'Turn on your microphone so that I can hear what you are saying!').

# 5. Providing information about the pandemic situation to national minorities

## 5.1. The virolinguistic landscape

The virus reshapes the linguistic landscape of public spaces as well. On the doors and windows of bureaus, schools, shops, cinemas, public transportation vehicles, etc., there are signs warning about potential infection and requesting that people wear masks, sanitize their hands, and keep a physical distance. Since the study of the linguistic landscape has many aspects, we differentiate between its various segments. For example, Tódor (2019: 16) mentions several fields of study, e.g. *cityscape* (cf. Malinowski 2010), which deals with the linguistic landscape of cities; *ruralscape* (e.g. Muth 2015), regarding the visual use of language in villages; or *cyberspace* (e.g. Ivkovic–Lotherington 2009), emphasizing the elements of the linguistic landscape pertaining to the virtual domain. Thus, by analogy with these examples, the field studied in this paper can be called *epidemiological linguistic landscape*, or *virolinguistic landscape* (cf. Lőrincz 2021).

The analysis of the captions of the virusscape from the standpoint of linguistics and language policy is important especially in the municipalities populated by Hungarians in neighbouring countries (e.g. Slovakia, Romania, Serbia). As stated in Article 4 (6) of Act No. 184/1999 of the Slovak Republic (W12), warning signs must include a Hungarian translation as well where at least 20% of the local population is Hungarian: "In municipalities with a high percentage of Hungarian population, information pertaining to the security of the lives, health, wealth, and the personal security of citizens must be displayed in publicly accessible spaces in Hungarian language as well" (Cúth–Horony–Lancz 2012: 25). The list of municipalities with a high percentage of Hungarian population is included in Government Regulation 221/1999 (W13). According to this regulation, "municipalities with a high percentage of Hungarian population" are municipalities in which citizens belonging to a national minority make up at least 20% of the population. In spite of the above regulation, in addition to bilingual signs, there are less Hungarian monolingual signs (*Figure* 1), while a number of Slovak monolingual signs can be found (*Figure* 2).[5] Mostly, there is an attempt to compensate for the lack of the mandated translation with a visual representation of the request.

5 Photos no. 1, 2, 3, 7, and 8 were taken by the authors of the study.


**Figure 1.** *Monolingual Hungarian caption in the window of a bar in Komárno (Slovakia) ('Max 2 persons per 1 table') Monolingual*


**Figure 2.** *Monolingual Slovak sign in the window of a shop in Komárno (Slovakia) ('No entry without face mask / Safety measures COVID-19', Wash your hands / Safety measures COVID-19')*

On bilingual signs, the Slovak caption usually precedes the Hungarian one; however, the font and size of the texts is the same. The translated text mostly reflects the meaning of the original text accurately; examples of loose translations are rare: *Vstup len s rúškom!* 'Entrance allowed only with a mask!' – *Védőmaszk használata kötelező!* 'Wearing a mask is mandatory!' (*Figure* 3).


**Figure 3.** *Bilingual warning in Slovak and Hungarian on the door and window of a notary's office in Komárno (Slovakia) ('Entrance allowed only with a mask!', 'Wearing a mask is mandatory!')*

### 5.2. Providing information to the public in a spoken form

Another important question is posed by the language policy aspect of providing information through mass communication. In this regard, Gábor Czímer (journalist working for *Új Szó*, a Hungarian daily newspaper in Slovakia) criticizes the monolingual character of the public address system on trains in southern Slovakia: "There are no warnings in Hungarian against the spread of the coronavirus pandemic on the trains of the state-owned railway company. […] In municipalities populated by minorities, warnings delivered in the public address system regarding the dangers of the coronavirus pandemic must be repeated in the minority's language" (Czímer 2020). Since the publishing of the quoted article, this issue has been resolved to some degree: "For example, bilingual warnings in Slovak and Hungarian have been introduced on connections between Bratislava and Komárno" (Szalai 2020).

## 6. Virtual linguistic landscape: The effect of the virus on social networking sites

The pandemic situation reshapes the content and appearance of social networking sites as well. The majority of the abovementioned linguistic examples (virologisms, new forms of interaction, etc.) is also from the Internet, so the remainder of this paper will only be concerned with coronavirus memes and coronavirus emojis.

### 6.1. Coronavirus memes

Coronavirus memes present the effect of the pandemic on day-to-day life, usually in a humorous, ironic, mocking, or critical style (cf. Veszelszki 2020b, Pauliks 2020): the increasing value of several products in shortage, some of which are taking up the role of currency (toilet paper, flour, yeast, but even pets that enable owners to go outside); students being crushed under the weight of a tremendous amount of school assignments; confinement and a lack of physical activities causing unprecedented obesity, etc. Ágnes Veszelszki (2020b) explains the popularity of coronavirus memes by the theory of relieving tension: according to this concept, "the main function of humour is to release inner and social tension, thanks to which the user(s) of humour become relieved and are freed from tension". However, it is necessary to add that coronavirus memes (*Figure* 4), beyond entertainment and the release of tension, also remind the receiver of the dangers of the pandemic, and thus they are significant on a social scale. Another one of their important qualities is the fact that, due to their widespread nature, they popularize memes even amongst those who are indifferent towards the genre.


**Figure 4.** *Coronavirus meme: Humour based on pragmatics (W14) ('The Battle of Auchan (c. AD 2020)')*


**Figure 5.** *Coronavirus meme: Humour based on semantics (W14) ('I worked wearing a mask and gloves already in 1993 / and then I didn't leave the house for 12 years')*


**Figure 6.** *Coronavirus meme: Humour based on grammar (W14) ('This is not a t-shirt / this is a stay at home overall')*

The source of the humour behind coronavirus memes can have a pragmatic, semantic, or even grammatical basis (cf. Istók 2018: 125–145). The basis is pragmatic if it violates Paul Grice's maxim of quality: "Do not say what you believe to be false" (1975: 46). The hyperbole (exaggeration), irony (carrying a different meaning), and immunization (replacement by an alien element) are considered to be the most common violations of this norm. The source of humour in *Figure 4* is exaggeration (the depiction of panic shopping as a historical battle).

Humour has a semantic basis when a change in script (the two best-known script theories are: Raskin 1985 and Attardo 1994) occurs with regard to lexicological sense relations – typically homonyms (homographs) or polysemes (multiple meanings). *Figure* 5 is referencing the robberies by Attila Ambrus in the 90s. The verbal cues (*maszk* 'mask', *kesztyű* 'glove', *dolgoztam* 'I worked', *ki sem tettem a lábam az utcára* 'I didn't even leave the house') activate the primary script (CORONAVIRUS) in the receiver: one works in a mask and gloves and stays at home to limit the spread of the pandemic. However, the reference to a confinement lasting longer than a decade (linguistic cue: *12 évig* 'for 12 years') and the visual cue (Attila Ambrus) make the reader sceptical and force them to reinterpret what they have just read. Then the attention is directed towards the twist (*maszk* 'mask': 1. medical mask; 2. robber mask) based on polysemy and the secondary script it creates (BANK ROBBERY): the mask and gloves are instruments of disguise, and the confinement (prison) is a consequence of the bank robbery.

Humour has a grammatical basis when someone uses an unexpected hapax legomenon, or occasionalism. *Figure* 6 shows Pál Győrfi, spokesperson of the

Hungarian National Rescue Service, well-known from the media, the "face" of the *Maradjanak otthon!* 'Stay at home!' slogan. The humorous effect is caused by the unusual merger of the phrase *Maradj otthon!* 'Stay at home!' and the word *otthonka* 'casual clothes worn at home, overall'.

### 6.2. Coronavirus emojis

Emojis (pictograms) depicting infection or the various methods of preventing infection have appeared or reappeared almost immediately after the break-out of the coronavirus pandemic. In this paper, these emojis are denoted by the term *coronamojis*. According to a research conducted on tweets by Emojipedia, the *Face with Medical Mask* and the *Microbe* pictograms were the most popular coronamojis during the first months of 2020 (Broni 2020).

A couple of widely known "pictograms" can even be seen on the billboards thus emphasizing the importance of prevention. *Figures 7* and *8* show billboards in Komárno (Slovakia) rented by Fort Monostor located in Komárom (Hungary). These warnings have been posted on the social network site Facebook (Istók–Lőrincz 2020: 90), so they are parts of the linguistic landscape of both the physical world and the virtual realm. Replacing a textual element of a popular slogan promoting prevention and solidarity (*Mossanak kezet!* 'Wash your hands!'; *Viseljenek maszkot!* 'Wear a mask!') with a pictogram can attract people's attention.


**Figure 7.** *Poster in Komárno by Ford Monostor (Slovakia) ('Wear a mask!')*


**Figure 8.** *Poster in Komárno by Ford Monostor (Slovakia) ('Wash your hands!')*

## Conclusions

In this paper, the authors attempted to present the terminological and methodological layout of virolinguistics, which investigates the virus language (virolect). Using Hungarian examples, the effect of the pandemic situation on communicational and cultural genres, the vocabulary, verbal communication, the virolinguistic landscape, and social networking sites were presented. The "directing principle" of virolinguistics, outlined as a heterogeneous linguistic discipline, can be identified in the continual warning about the danger of getting infected (warning function) and the creative visual and verbal illustration of the pandemic situation (entertaining and stress-relieving function). Based on the presented objectives and examples, virolinguistics prefers the following methods of data collection: (1) passive (non-interventionist) data collection on the Internet (e.g. new words, phrases; collection of forms of interaction, observing their context as well); (2) passive (non-interventionist) data collection in public spaces (e.g. taking pictures of captions that warn about the dangers of the virus); (3) online surveys or interviews (e.g. views on the information provided to minorities verbally).

Henceforward, qualitative researches will be replaced by quantitative ones, like in the authors' other work on a linguistic landscape research theme supported by the Slovak Research and Development Agency (contract no. APVV-18-0115), in which a statistic analysis of the virolinguistic inscriptions of Komárom and Komárno are done.

It is worth considering to use the knowledge of virolinguistics in education: humorous coronavirus memes to introduce some language phenomena (e.g. polysemy, homonymy), or virologisms are suitable to illustrate the language change (e.g. derivation).

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# Metaphors in Crisis (On COVID-19 in Romanian and US Articles)

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**Abstract.** The aim of the paper is to identify similarities and differences in terms of the metaphors used to present the COVID-19 crisis in Romanian and US articles. The paper is structured in two parts – a theoretical and a practical one. The theoretical framework presents metaphors from the cognitive linguistic perspective as a way to understand and explain reality, metaphors playing a major part in human thinking. They are approached in the paper as a subjective way of presenting reality, being indicative of cultural differences. The practical part analyses thirteen Romanian and US articles taken from broadsheet newspapers, focusing on three areas – the presentation of the virus, people's reaction to it, and the vaccine – in order to see the types of metaphors and the source domains used.

**Keywords**: metaphor, cognitive linguistics, mapping, newspaper articles

## 1. Theoretical framework

### 1.1. Definition and features of metaphors

Traditionally, metaphors have been defined as a figure of speech, characteristic of literary language, which involves an implied comparison between two terms and points to a pre-existing similarity between them; the features of one domain are transferred to another one, and thus one thing is used to stand for another.

This traditional view of metaphor was critiqued by Max Black (1962), who states that metaphors have a cognitive dimension, as they are a way of organizing human perception, rather than an artistic function. Thus, metaphors acquire an ontological function emphasizing specific features of an object over others. Lakoff and Johnson (1980) continue the cognitive theoretical theory, proving that metaphors are based on human bodily experience; for example, "up" acquires a positive value while "down" a negative one, being closely connected to early

childhood experience. It is the notion of embodiment that sets off the cognitive linguistic view from the traditional one (Kövecses 2010: xii).

The cognitive linguistic view approaches metaphors as a basic way for people to comprehend and explain reality since metaphors are used to understand abstract concepts by resorting to more concrete sources. Lakoff (1993) advances to the concept of "cognitive disposition" to account for established correspondences between targets and source. These correspondences, which connect sensorimotor experiences to more abstract concepts, become fixed in the human mind, calling each other; an example would be the correspondence between a love relationship and a journey. The example provided by Lakoff is the following: "The lovers correspond to travelers. The love relationship corresponds to the vehicle. The lovers' common goals correspond to their common destinations on the journey. Difficulties in the relationship correspond to impediments to travel" (Lakoff 1993: 207).

After being established, such correspondences begin to manifest themselves in various verbal expressions, which have a metaphorical character: "Our relationship has hit a dead-end street… Look how far we've come. We can't turn back now. It's been a long, bumpy road. We're at a crossroads. We may have to go our separate ways. The relationship isn't going anywhere", etc. (Lakoff 1993: 206).

Therefore, an initial single metaphor (love is a journey) can be expressed in different ways, which are all surface structure ways of expressing underlying meanings.

The critique brought to this theory was that bodily experience is also influenced by cultural factors (Mottier 2008). Similarly, Goatly believes that "Body and bodily experience are affected by culture, so the fact that bodily experience gives an experiential basis for metaphors does not entail that all kinds of bodily experience are universal" (Goatly 1998: 216), and Kövecses expressed the same point of view: "The ground of metaphor is human experience, which includes bodily, perceptual, cognitive, biological and cultural ones, domains which can combine, generating correlations" (Kövecses 2010: 325).

Kövecses (2010), a supporter of the cognitive theory, demonstrates that metaphors are used in a variety of discourse types, ranging from literature to advertisements, and that they can be realized non-linguistically too in other areas of human experience – acting, cartoons, drawings, sculptures, architecture, sounds, or gestures.

In this paper, metaphors are approached as a fundamental way of understanding reality, but also as a figure of speech, which may draw attention of unexpected similarities between objects. Metaphors also have an ideological function as they emphasize particular features of objects over others and are culturally influenced. As already stated, metaphors have been explained as thinking of one thing (A) in terms of another (B), where A is called the topic or the target, and B is the vehicle or source (Goatly 1998: 11).

The source usually resorts to a more concrete concept, while the target is usually a more abstract term; the direction is only one – from the more concrete to the more abstract domain, a process explained by the way the human mind works (Kövecses 2010: 8–9). The transfer between these two terms relies on mapping, which means establishing similarities or analogies between A and B (Goatly 1998: 11).

Chilton defines mapping as follows: "presupposing that the two domains are already structurally similar, metaphors work by projecting one relatively well-understood set of ideas onto a domain that is problematic, rather than by simply expressing a pre-existing and objective similarity" (Chilton 1996: 106).

As the definition indicates, the choice of similar elements between the source and the target is not objective.

There are domain sources that are more frequently used, such as the "human body, health and illness, animals, plants, buildings and constructions, machines and tools, games and sports, business, cooking and food, heat and cold, light and darkness, forces, movement and direction", etc. (Kövecses 2010: 8–22).

It is often the case that several source domains are used to understand a particular target, as each of the source domains accounts for a particular aspect of the target – "a concept is jointly understood by several metaphors as this is a more efficient way of understanding the concept" (Kövecses 2010: 96).

According to Grady (1999), metaphors can be motivated by three factors – correlation (related to human experience), resemblance (related to the similarities between the source and the target), and generic (a structural type of similarity).

Kövecses (2010) introduces the concepts of partial mapping and partial metaphorical utilization. Partial mapping refers to the fact that the similarities between the source and the target are adopted, as they do not pre-exist, and the gap that has to be filled can be more or less obvious. Partial metaphorical utilization accounts for the use of certain aspects of the source domain that explain the target and for the ideological character of metaphor, as it foregrounds certain features of an object and reduces others, which results in a subjective way of understanding reality:

> Metaphors may have negative effects on thinking by providing a false sense of understanding and excluding alternative conceptualization, or may structure the Target domain in ways which are too simple or too partial. They have a tendency to form regimes of truth to create a model of reality – thinking makes it so. We need a variety of metaphors to survive or a suspicion about all metaphor if we are to be open to the realities beyond it. (Kövecses 2010: xi)

Metaphors have been classified according to several criteria, such as novelty, sources used, ontology and orientation, complexity, diversity, and cultural

variation. In terms of novelty, metaphors are differentiated as being live, or original, and dead. The latter category is already part of the lexicon, being no longer perceived as metaphors by language users. Cognitive linguistics states that dead metaphors do not influence people's thinking to a great extent, while the conceptual metaphor theory claims that they do, albeit in an unconscious way (Goatly 1998: 22). Metaphors move along a scale from more conventional (metaphors that are very familiar and frequently used) to less conventional ones, also called "novel metaphors", which prevail in literature; nevertheless, conventional metaphors can be expressed in unconventional ways. Conceptual metaphors are defined as metaphors describing a more abstract concept by resorting to a more concrete source. In a text, conceptual metaphors are manifested by means of linguistic metaphorical expressions (e.g. life is a journey, trip, road, path, etc.) (Kövecses 2010: 4).

Another classification differentiates between ontological metaphors (metaphors which allow the speakers to understand their experiences in terms of general objects or substances) and orientational ones (metaphors that resort to spatial orientation – such as up–down, in–out, etc.). The difference between ontological and orientational metaphors is that the former class covers a wider range of concepts, while the latter relates more to spatial representation. In terms of complexity, there are complex and simple metaphors; a simple metaphor resorts to one single important feature of an entity, while a complex metaphor consists of several simple ones (Kövecses 2010).

Metaphors can be diversified (the target is expressed by bringing together several sources, e.g. failure is division, shipwreck, or sinking) and multivalent (several targets are used to describe the same source, e.g. liquid is crowds, traffic, emotion, etc.) (Goatly 1998: 12–13).

Metaphors are deeply influenced by culture with metaphorical variation within one culture (intracultural) and between several cultures (intercultural); intracultural metaphors can be further classified in terms of levels: general – all speakers of the language use them; individual – the lowest usage level (Kövecses 2010: 324).

There are two comprehensive metaphorical systems, namely the Great Chain metaphor, which resorts to source domains such as human body, buildings, machines, plants, etc., and the Event Structure metaphor, which resorts to concepts such as location, force, and motion (Kövecses 2010, Lakoff–Turner 1989, Musolff 2005).

To conclude, metaphors have a dual function – the foremost being the cognitive one, as it helps us to understand abstract concepts by resorting to more physical and concrete objects, and a stylistic one. However, the choice of particular similarities between the target and the source are characterized by cultural factors and subjectivity.

This analysis of metaphors related to the COVID-19 crisis as depicted in Romanian and US articles is based on the cognitive function of metaphors as the predominant one, takes into account subjectivity and cultural factors, and aims to identify the sources for the metaphors journalists deploy in order to describe the crisis.

## 2. Data analysis

### 2.1. Articles selected

This part of the paper analyses several articles from Romanian and US newspapers. The aim is to compare the metaphors used to describe the COVID crisis in terms of source with the purpose of identifying similarities and differences between them. The hypothesis is that these differences are indicative of the cultural way of describing and understanding the world.

The selection principles of the articles were that the headlines include the term COVID, that they be published in broadsheet newspapers, and that they have a similar overall length. The analysis is a starting point for a more in-depth study, which tries to establish common COVID-19-related topics, metaphors used to describe them, and source domains in broadsheet articles published in Romania and the US. For the current analysis, the articles were a non-probability, convenience sample. The common element is the overall length of the articles. In total, there are thirteen articles – seven US articles published between December 2020 and April 2021 in Washington Post, USA Today, and LA Times and six Romanian articles, all published in *Adevărul* between April 2020 and January 2021.

### 2.2. Description of the virus

In most of the US articles analysed, the virus is personified as an enemy, a strong one that hits hard, affecting people, institutions, regions, and countries and causing the death of numberless people:

(1) Hospitals across Southern California have been hit hard by the recent COVID-19 surge (US A7)

or

(2) The virus continues to rage (US A2)

It is an unknown enemy that fights in a dishonest and dangerous way, spreading at a rate that is "frustrating and alarming":

(3) Johnson said the new variant was 50 to 70 percent more transmissible, spreading at a rate he called "frustrating and alarming" (US A1)

The virus is presented as an enemy that cannot be defeated:

(4) "Let me be candid with you: This virus is out of control" (US A1)

The battle is extremely intense

(5) "It's definitely hit crisis levels", the psychiatrist said (US A6)

and involves a huge number of cases – the number of cases go up –, a schema metaphor, where "up" relates to increasing amount:

(6) The government had been facing growing calls to impose further restrictions as coronavirus cases continue to skyrocket. (US A6)

Some of the linguistic metaphorical expressions suggesting the war metaphor are enemy, casualties, mass deaths, onslaught, hits hard, etc.

The virus is also personified as a thief stealing lives and changing lifestyles:

(7) COVID-19 has stolen lives, broken families, widened the wealth gap and rewired life in East L.A. (US A4)

or

(8) nearly every street corner holds some sign of the virus that has stolen more than 24,000 lives statewide, widened the wealth gap and rewired the rhythms of how we mourn, learn, work and worship. (US A4)

Other metaphors used are related to natural disasters – storm, flood, or earthquake. The virus is presented as a storm that hits in waves:

(9) We're in the midst of the mental health wave – and we're even bracing ourselves for more to follow. (US A6)

Sometimes periods of calm are mentioned:

(10) During moments of relative calm, nurses share tips about caring for patients. (US A7)

COVID-19 is also presented as a flood, a natural force that cannot be controlled by humans:

(11) Heaton worries that if the hospital becomes too inundated with COVID-19 patients, it will be harder to care for people. (US A7)

Another metaphor is that of an earthquake:

(12) California accounts for more than 2 million infections and 26,500 deaths, with Southern California as an epicenter. (US A5)

The articles also include contextual metaphors, for example, the strain which refers both to the virus and to the pressure that people fighting it are under:

(13) Medical professionals are working under tremendous strains. (US A3)

In the Romanian articles, the war metaphor is also used, the virus being presented as an enemy, as indicated by such metaphorical lexical realizations as front line, casualties, etc. The virus is personified too – it is a dangerous agent as it adapts itself:

(14) *există acest risc ca virusul să sară această barieră a speciilor* (Rom A2)
'there is the risk of the virus jumping over this barrier of species'[1]

(15) *Noul coronavirus a reuşit să introducă în vocabular noi cuvinte, definiții sau concepte cum ar fi 'lockdown' (autoizolare), 'distanță fizică/sanitară', 'infodemie"' …Pe lângă asta, criza sanitară de anul trecut ne-a impus noi obiceiuri, dându-ne peste cap modul de viață cu care ne obişnuisem până nu demult.* (Rom A4)
'the new coronavirus has managed to introduce new words, definitions, or concepts in the vocabulary such as lockdown (self-isolation), physical/social distance, infodemic… Besides, last year's health crisis has imposed new habits, overturning the lifestyle we got used to recently.'

The war metaphor is used less to present the war against the virus and more for the war against false rumours – a kind of war mentioned only in Romanian articles.

1 The translations are my own throughout the article.

Natural disasters are also a source domain describing the virus, which is presented as an earthquake:

(16) *În 2020 întreaga planetă fusese zguduită de pandemia COVID-19.* (Rom A4)
'In 2020, the whole planet was shattered by the COVID-19 pandemic.'

or a storm hitting in waves:

(17) *pandemia şi perspective imediată a intrării într-un al doilea val cel puțin la fel de mortal* (Rom A5)
'the pandemic and the immediate perspective of a second wave, at least as deadly'

All these features make the virus a strong opponent in battle. It shakes lives and introduces new words in people's vocabulary.

The virus is also metaphorically referred to as an ogre – a cultural metaphor:

(18) *N-a trecut mult şi a apărut în acest basm cult căpcăunul, sub forma lui covid 19.* (Rom A1)
'not long after, the ogre appeared in this literature fairy tale, under the form of COVID-19'

or as the dragon of dragons:

(19) *în lupta contra zmeului zmeilor timpurilor noastre* (Rom A1)
'in the battle against our times' dragon of dragons'

The virus is derogatorily presented as a masquerade:

(20) *mascaradei COVID-19* (Rom A4)
'of the COVID-19 masquerade'

or by means of nouns alluding to cheap food (pretzel or mullet), mock names based on puns:

(21) *epidemia COVRIG/GUVID* (Rom A4)
'COVID/pretzel/goby epidemic'

The Romanian articles also resort to contextual metaphors, an example being the X-ray, which is both a medical test and a psychological way to better understand the current situation:

(22) *o radiologie aprofundată a fenomenului dezinformării* (Rom A4)
'an in-depth X-ray of the rumour phenomenon'

So, in the Romanian articles, the virus is described as an enemy, a natural disaster (earthquake, storm), and an ogre, a cultural reference to folk tales. The US articles describe the virus as an enemy or a thief and a natural disaster, the range being slightly wider – storm, flood, earthquake.

### 2.2. People's reaction to the virus

In the US articles, people's reaction to the virus is presented by means of the war metaphor. The patients are

(23) fighting for their next breath (US A7),

the medical staff are front-line soldiers, whose equipment suggests that the war is fought against an alien entity:

(24) Front-line health care workers, who wear special equipment in the battle, every nurse or doctor is encased in a respirator or mask, face shield, gown and gloves so they appear as astronauts tending the untouchable and unembraceable. (US A7)

Being such a dangerous and unpredictable enemy, the virus has to be fought with special vigilance:

(25) Johnson said, "We have a new variant that is requiring extra-special vigilance." (US A1)

and also with high speed, the underlying conceptual metaphor being SPEED IS GOOD – the measures taken to fight the virus are part of the

(26) operation warp speed (US A1).

The virus is presented as an enemy that has to be contained:

(27) "With most of the country already under extreme measures, it's clear that we need to do more together to bring this new variant under control while our vaccines are rolled out", he said. "In England, we must, therefore, go into a national lockdown which is tough enough to contain this variant." (US A1 2021)

In this fight, it is not only the virus that is personified but regions too, which fare badly:

(28) If ever a region was susceptible to faring poorly during a pandemic, it is one like the Inland Empire. (US A7)

The lexical realizations are mainly related to sacrifice and loss:

(29) Inside America's ICUs, the sacrifices of health care workers never cease. (US A3)

as well as daily deaths, death toll, front-line, heroes:

(30) A growing number of Heroes Work Here signs are sprouting outside hospitals across the nation. That's appropriate. (US A3)

In the Romanian articles, the war metaphor is also used but not that frequently as in the US ones. The war is mainly fought against false rumours and, as in the US articles, it is a modern war – of a cybernetic nature, a description combined with more traditional concepts such as ample campaign, attacks, Eastern flank.

The population is required to wear protection equipment, like in war, but the ones obeying these regulations are metaphorically presented as animals – they are cowards and thus are subjected and trained:

(31) *masca devenise deja simbolul supunerii şi dresării de către autorități a cetățenilor „laşi"*. (Rom A4)
'the mask had already become the symbol of obedience and training of the 'coward' citizens by the authorities.'

The battle between the people and the virus is based on cultural metaphors – canonical Romanian literary works such as Caragiale's *A Lost Letter* (2017), which is brought to mind by the famous antithetic epithet "cleanly dirty" and by the name of the corrupt policeman Pristanda, as well as Romanian proverbs (e.g. butter wouldn't melt in his mouth) and fairy tales.

The mappings for the fairy tales are: the virus is the ogre or the dragon (powerful, dishonest, mean, dangerous); the politicians are the negative characters; the EU, Brussels, and Berlin are the rulers at the king's court (greedy, corrupt, looking after their own interests); some of the European officials are the beldames (selfish, cheating, corrupt); the vaccine is Prince Charming (fair, brave, ready to fight, and usually winning); the uncorrupted EU politicians are the characters that support

Prince Charming (promoters of the public good, taking the right side, helping how and when they can) (Rom A1).

Containment metaphors are also present, for example, the spreading of the virus is contained:

(32) *Am controlat rapid răspândirea virusului* (Rom A4)
'We quickly controlled the spread of the virus'

but less frequently than in the US articles.

Contextual metaphors are used as well – for example, the advice for people to look after their immunity, the mental one included:

(33) *Aveți grijă de voi şi de imunitatea dvs., inclusiv de cea informațională pentru a vă proteja de falsele conținuturi.* (Rom A4)
'take care of your immunity, the informational one included, to protect yourselves against fake content.'

As far as people's reaction to the virus is concerned, in the Romanian articles, the metaphor of war is present (war fought against rumours, a modern type of war – cybernetic), but also more traditional references to war (attacks, flank). There are cultural metaphors, where the sources are fairy tales, and canonical literary works. The US articles include mainly metaphors related to wars (fought either on land or in the outer space with special equipment). There are also traditional references to war – death toll, front line, heroes. Semino's study (2021) criticizes the war metaphor used to present the pandemic, the reason being that it creates too much anxiety and yields the wrong impression that the people who died of COVID did not fight the virus enough. Semino associates the war metaphor with a natural disaster, another frequently used metaphor for COVID-19, which she criticizes on the same grounds.

### 2.3. The vaccine

In the US articles, a frequently used conceptual metaphor is that of the game – the fight between health experts and the virus is a game that can be won by people because of the vaccines that have been produced. Thus, the concept of the war is now moved to one of gambling, maybe in order to refer to the uncertainties related to the effects of the vaccine. The vaccine is called a "game changer", as currently the virus has the upper hand, but this is a situation that the vaccine may change.

(34) The government hopes that the Oxford-AstraZeneca vaccine, which is cheaper to produce and easier to transport than other vaccines that are being administered, will be a "game changer". (US A1 2021)

In the Romanian articles analysed, the vaccine is discussed far more often than in the US ones. The vaccine is also described by resorting to the war metaphor – it is a sniper aiming right at the bull's eye.

(35) *Expert român, despre cum acționează vaccinul anti-COVID: 'E ca lunetistul care ţinteşte exact unde trebuie'.* (Rom A2)
'Romanian expert on how the anti-COVID vaccine works: It's like the sniper that aims precisely where necessary'.

The vaccine is a weapon that will overcome the pandemic, but after the battle few will be left standing and the circumstances will be difficult:

(36) *Pandemia va fi învinsă. Dar cine mai rămâne în picioare şi în ce condiții?* (Rom A6)
'The pandemic will be defeated. But who will be left standing and under what circumstances?'

The metaphorical realizations related to war are sniper, shot, kill, people left standing, and very often campaign (used for vaccination, public health, and information campaign):

(37) *România ar fi trebuit să înceapă mai devreme campania de informare a publicului cu privire la vaccinare… „Împreună cu colegii mei am avut o serie de inițiative, cum ar fi susținerea unei campanii de vaccinare încă din luna mai… şi nu s-a înțeles că pentru succesul unei campanii de sănătate publică este necesară desfăşurarea unei campanii de informare din timp."* (Rom A2)
'Romania should have started earlier the public informational campaign about the vaccination…. "Together with my colleagues we had initiatives such as to support a vaccination campaign as early as the month of May… and it was not understood that for a public health campaign to be successful an information campaign must be organized in due time".'

The vaccine is more than a medical weapon, it is also used as an ideological and psychological one:

(38) *în cazul cel mai negru, vaccinul anti-COVID-19 va deveni armă de luptă în noul Război Rece? Va fi util şi împotriva demenței politice?* (Rom A5)
'in the worst-case scenario, will the anti-COVID vaccine become a weapon in the new Cold War? Will it be efficient against political insanity?'

The vaccine is also presented by resorting to source domains such as science combined with natural environment and war: immune system, aggressive response, cytokine storm, primary immune answer, first defence line:

(39) *Ştefan Dascălu a explicat şi cum acționează vaccinul şi ce parte a sistemului imunitar o stimulează. „Răspunsul imunitar poate fi foarte agresiv. Acea furtună de cytokine este o manifestare foarte agresivă a răspunsului imunitar primar. Este prima linie de apărare."* (Rom A2).
'Ştefan Dascălu also explained how the vaccine works and which part of the immunity system it stimulates. "The immunity reaction can be very aggressive. This cytokine storm is a very aggressive manifestation of the primary immunity reaction. It is the first defence line".'

The vaccination is presented as a protection blanket, which suggests again the containment metaphor. The authorities fight the virus by containing it and aiming for a wide vaccine coverage:

(40) *Autoritățile doresc doar o acoperire vaccinală cât mai mare pentru a limita răspândirea epidemică a virusului SARS-CoV-2.* (Rom A4)
'The authorities merely want a vaccine coverage as wide as possible to restrict the epidemic spread of the Sars-Cov-2 virus.'

The most frequently used metaphor is that of a race, used to describe vaccines, countries and continents, which are all personified. Countries are ranked in terms of the percentage of the population's immunization:

(41) *Ce procent de imunizare anti-COVID are România în clasamentul mondial.* (Rom A6)
'Romania's anti-COVID immunization percentage in the world ranking'

or

(42) *Israelul continuă să conducă, de departe, în topul mondial.* (Rom A6)
'Israel continues to lead by far in the world ranking'.

The country finishing the race first is awarded the gold medal:

(43) *Cui să i se dea medalia pentru performanțe deosebite în procurarea rapidă şi în suficiente cantități ale vaccinurilor Biontech-Pfizer, AstraZeneca, Moderna?* (Rom A1)

'Who should be awarded the gold medal for special performances in purchasing quickly and in sufficient amount the Biontech-Pfizer, AstraZeneca, Moderna vaccines?'

The vaccines themselves are in a race against each other, as they are called candidates to be selected in terms of their prices:

(44) *Veți avea o serie de prețuri diferite, în funcție de care vaccinuri candidate vor reuşi.* (Rom A3)
'You will have a range of different prices depending on which candidate vaccines will win.'

Another source domain is business, as several articles present the vaccine as a merchandise that is in high demand and will be distributed:

(45) *UE, Germania şi Japonia oferind fonduri pentru ca vaccinurile să fie accesibile în mod echitabil, repetând mesajul că acestea să fie considerate „bun global".* (Rom A5)
'The EU, Germany, and Japan offering funds so that the vaccines should be fairly accessible, repeating the message that they should be considered a "global good".'

The business metaphor is emphasized by lexical choices such as global demand, power of negotiation, financing, investment risks, and goods. Thus, while in the Romanian articles the vaccine is presented by resorting to source domains such as war, race, or business, the US articles resort to the game metaphor.

## 3. Conclusions

The analysis of the thirteen articles representing a convenience and non-probability sample can be considered as indicative of a trend in terms of the types of metaphors used. Both the Romanian and the US articles analysed present the COVID crisis by resorting to a wide range of metaphors; this new situation is described by metaphors that are already familiar but are now put to a new use. So, the metaphors encountered are towards the more conventional end.

In terms of the three analysed areas – the virus, people's reaction to it, and the vaccine –, the metaphors in the thirteen articles present both similarities and differences. The common source domains used in the Romanian and the US articles are war and natural environment catastrophes. The virus is a natural disaster, a storm hitting in waves, an earthquake. It is personified in both types

of articles as an enemy conscientiously affecting and destroying people's lives. In one of the Romanian articles, mock names (from the cooking source domain) are also used. The difference as to the presentation of the vaccine is that it is based on the gambling metaphor (the US articles) and the race metaphor (the Romanian articles).

The most frequently used conceptual metaphor is that of the war, which has not only traditional characteristics (heroes, victims, tactics, etc.) but also more uncommon ones (a battle in the outer space, a cybernetic war, etc.). In the analysed Romanian articles, the war is also fought against false rumours and misinformation.

Other conceptual metaphors that are used are gambling (in the US ones), race and trade (in the Romanian ones), and personification (both). In the thirteen articles, the war metaphor appears more frequently in the US ones, while the competition one is more frequent in the Romanian ones; containment metaphors appear more frequently in the US articles.

The metaphors in both types of articles are complex, as the target domain is described by resorting to several source domains (for example, the virus is an enemy, a natural disaster) and both kinds of articles resort to diversified and specific level metaphors. As far as the two metaphorical systems are concerned (the Chain Structure and the Event Structure), the Chain Structure one is more frequently used in both types of newspapers.

The analysis indicates that for the 13 articles the differences between the Romanian and the US articles as far as the metaphors used are concerned are mainly of intensity and frequency of use, a situation which is probably accounted for by cultural differences. However, the study should be continued by including a larger number of articles, published in Romanian and US broadsheets.

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# Rectifying Language? Snarl Words and Politically Incorrect Language

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**Abstract:** Confucius was asked what he would do if he were a governor. He said he would rectify the names to make words correspond to reality. In this study, we wish to approach the problem of language changes that led to the emergence of concepts such as snarl words and purr words, as stated by S. I. Hayakawa, to refer to highly connotative language or politically correct and incorrect language. Can language be correct or incorrect politically? Should we ban words just because we perceive them as threatening social harmony? Should language be rectified and by whom? Or should we agree with Confucius, who believed that names, i.e. words should be used appropriately in the sense that if names are not correct, language is not in accordance with the truth of things. What is correct in language and what is not? Can language be outlawed at all? Have words changed so drastically or has the surrounding reality changed? Should we use language correctly or appropriately? Can the shaping of new nomenclatures and decreeing words as undesirable or imposing meaning changes induce social harmony, or such attempts will only lead to a pandemic of euphemisms and nothing more? We try to look into the ways in which words are doomed for being politically, socially (or perhaps emotionally?) incorrect. We gather a corpus of such banned words and/or meanings and analyse the ways their perception has changed over the past years.

**Keywords**: snarl words, purr words, politically correct, language, meaning

## 1. Introduction

In his *Analects*, Book XIII, Chapter 3, verses 4–7, the Chinese philosopher Confucius states that social disorder often stems from failure to perceive, understand, and deal with reality, and, fundamentally, social disorder may stem from the failure to call things by their proper names; and his solution to this is the rectification of names. Confucius believed that names, i.e. words, should be used appropriately in the sense that if names are not correct, language is not

in accordance with the truth of things. Whenever words fail to name what we see, there is need for rectification. In this article, we will attempt to approach the problem of language changes that led to the emergence of concepts such as snarl words and purr words, as stated by S. I. Hayakawa (1947), to refer to highly connotative language or politically correct and incorrect language. The relationship between language and the world, words and objects has always been an evergreen field of debate for linguists. Language is the most important of all the tools humankind has created, as language has helped people develop and build up civilizations. "However, like any other tool, language can be abused, used not to build but to destroy, not to communicate but to confuse, not to clarify but to obscure, not to lead but mislead" (Lutz 1989: 1–2).

## 2. Snarl words vs purr words

We approach the problem of language changes that led to the emergence of concepts like *snarl words* and *purr words*, as stated by S. I. Hayakawa (1947), to refer to highly connotative language, more recently called politically correct and incorrect language, in order to look into the ways in which words are doomed to be politically, socially (or perhaps emotionally) incorrect. If language can be used for political purposes, this must be done by having an action-oriented approach to language and by exploiting all the emotional potentials of language. Hayakawa (1947) calls the words with strong negative connotation *snarl words*, while the words with strong positive connotation are called *purr words*. Purr words and snarl words convey the person's feelings and attitudes and not features of the words themselves. Here are some examples of present-day snarl and purr words:

– Snarl words: *wars*, *poverty*, *racism and ethnocentrism*, *hate speech*, *hate crime*, *discrimination*, *racist*, *thought criminal*; *totalitarianism*, *authoritarianism*, *fascism*, *dictator*, *genocide*, *ethnic cleansing*, *holocaust*, *cold war*, *national*.

– Purr words: *globalization*, *optimization*, *profit*, *peace*, *democracy*, *welfare for all*, *globalized*, *new*, *pro-choice*, *pro-active*, *activism*, *integrate*, *open*, *inclusive*, *innovative*, *neutral (climate neutral*, *gender neutral*, *net neutrality)*, *digital*, *inclusive*, *multi-tasking*, *up-to-date*, *green*, *international*, *multicultural*, *-friendly*, *digital*, etc.

## 3. Definition and history of political(ly) correct(ness)

The adjective *politically correct* (hereinafter referred to as PC), which gave rise to the emergence of the noun *political correctness*, is related to "a belief that language and practices which could offend political sensibilities (as in matters

of sex or race) should be eliminated".[1] Its synonyms are *dogmatic, orthodox*, or *right-on* (British), while its antonyms include *heretical*, *unorthodox*, *politically incorrect*. It also carries the meaning of being respectful of marginalized ethnic groups, genders, etc. *Encyclopedia Britannica 1992 Book of the Year*, describes PC as: "[A] pejorative term to describe a loose connection of feminists, Marxists, multiculturalists and deconstructionists together with their assorted leftwing position on race, sexual orientation, class, the environment and related issues" (cf. Benassi 1997: 46). Today, a significant amelioration can be spotted, as today *Encyclopedia Britannica* defines political correctness as:

> language that seems intended to give the least amount of offense, especially when describing groups identified by external markers such as race, gender, culture, or sexual orientation. The concept has been discussed, disputed, criticized, and satirized by commentators from across the political spectrum. The term has often been used derisively to ridicule the notion that altering language usage can change the public's perceptions and beliefs as well as influence outcomes.[2]

The term *political correctness* sprang from the Marxist tradition,

> which claimed the ability to perform scientific analysis of social and political events, and thus allowed for the possibility of being correct or incorrect in one's analysis. The party line, as defined by the ruling elite in communist regimes, invariably claimed correctness, of course, and invented elaborate *ex post facto* rationalizations for even the most radical policy changes. Soon, however, the concept of PC was adopted by opponents of Marxism to ridicule the dogmatism and obvious opportunism of communist regimes, as, for instance, in George Orwell's brilliant satire *Animal Farm*.[3]

The term *political correctness* was used as early as 1921; however, the ideological concept was invented 27 years earlier

> as a criterion of Marxism Leninism. In 1894, Lenin created *партийность* 'partiinost', which meant partisanship, party membership, party-mindedness, party spirit, or party truth, and in the early twentieth century the term was associated with the dogmatic application of Stalinist and Communist Party doctrine. This sense was later promoted by the Chinese

1 https://www.merriam-webster.com/dictionary/politically%20correct.
2 https://www.britannica.com/topic/political-correctness [Last accessed: 28 June 2021].
3 https://www.encyclopedia.com/social-sciences-and-law/sociology-and-social-reform/sociology-general-terms-and-concepts/political-correctness [Last accessed: 28 June 2021].

> communist leader Mao Zedong in his 1963 essay *Where Do Correct Ideas Come from?*, which equated *correct* with *the disciplined acceptance of a party line*. (Phumsir–Tangkiengsirisin 2018: 448)

In the 1970s, the terms were adopted and started to be commonly used by Western left-wing politics. Political correctness claims its essence from the critical theory of the neo-Marxists, representatives of the Frankfurt School, which is why the current is also called cultural Marxism. In his book *Essay on Liberation*, Herbert Marcuse, a prominent representative of the ideological current known as the Frankfurt School, stated the need for a radical reform of values through the relaxation of taboos, cultural subversion, critical theory, and a process of linguistic revision aimed at a methodical reversal of meaning. Experts believe that this theory is at the root of political correctness, as highlighted by Ioniță (2014: 35).

## 4. PC language and euphemisms

The term *euphemism* designates a soft word or phrase that replaces a lexeme referring to taboo, uncomfortable or harsh issues that people might find offensive, embarrassing, or unpleasant. PC language and euphemisms have at least one other thing in common, i.e. the reorientation of lexeme semantics: they obscure cognitive meaning, lessen the significance of negative associated meanings, and deemphasize uncomfortable connotations: e.g. it is very difficult to talk *about dead people* or *death tolls* after warfare situations and the usage of *collateral damage* takes some of the pressure off.

The promoters of PC have succeeded in replacing Standard English with a form of Newspeak. In the dystopian world of Orwell's *Nineteen Eighty-Four*, the government controls everything, including language. Newspeak designated by the State as the standardized official language is devised to meet the ideological needs of English Socialism. "In the year 1984 there was not as yet anyone who used Newspeak as his sole means of communication, either in speech or writing. […] It was expected that Newspeak would have finally superseded Oldspeak (or Standard English, as we should call it) by about the year 2050" (Congdon 2002: 1).

Orwellian Newspeak words were divided into three distinct classes, the A, B, and C vocabularies. All the words in the B vocabulary were compound words and were ideologically engaged. A great many were euphemisms (words like *joycamp*/forced-labour camp or *Minipax*/Ministry of Peace, i.e. Ministry of War, meant almost the exact opposite of what they appeared to mean). Some typical examples of Newspeak are: *blackwhite*, *crimethink*, *goodthink*, *hate crime*, *thought crime*, *doublespeak*, etc. As compared with Orwellian Newspeak, which is assumed to be ideologically engaged, PC newspeak is assumed to be neutral;

nevertheless, we must look into the meaning change suffered by one of the fetish words of PC discourse, *neutral*. While traditionally *neutral* means *neither good nor bad, not taking part or giving assistance in a dispute or war between others, not aligned with or supporting any side or position in a controversy*, *of no particular kind, characteristics*, etc., in PC semantics, neutral always refers to the good, the desirable, the ideal state of affairs (e.g. *climate neutral*, *gender neutral*, etc.). Purr and snarl words, and PC language as a form of prejudicial language are a form of *doublespeak*, called by Hayakawa (1947) *oververbalization*.

> Doublespeak is language that pretends to communicate but really doesn't. It is language that makes the bad seem good, the negative appear positive, the unpleasant appear attractive or at least tolerable. Doublespeak is language that avoids or shifts responsibility, language that is at variance with its real or purported meaning. It is language which conceals or prevents thought; rather than extending thought, doublespeak limits it. (Lutz 1990: 1)

The word *doublespeak* combines the meanings of *Newspeak* and *doublethink*. This is language which attacks the very purpose of language, communication between people. This is indeed language which, in Orwell's words, is "designed to make lies sound truthful and murder respectable, and to give an appearance of solidity to pure wind" (cf. Lutz 1989: 7, Orwell 1946). Snarl words, purr words, PC language, Newspeak, and doublespeak are all affective or emotional language, based on banning some words and promoting others. But the question is: can we ban words which cover undesirable facts? Can we change the surrounding reality if we change the words or change semantics? Were the dictionary writers to take a position on the inclusion of a word according to whether the term indicated by it is desirable or occurs in the field of language, they would not include such words as *COVID-19*, *pneumonia*, or *leprosy* (see also Kontra 2016: 654–655).[4] But obviously, this is simply a utopistic approach to the nature of words and their relationship with the world.

## 5. Can affective language be a tool for manipulation?

The kind of attitude that Hayakawa (1947) calls *two-valued orientation*, which sees things in two terms only, without nuances, without accepting the possibility of middle ground and the kind of language this thinking promotes, can be used

4 Word bans were part of lexicographical policies in communist regimes, such as leaving out all references to Transylvania when defining entries which named realia linked to Transylvania such as *kaláka* (cf. Kontra 2016). Other words purged from dictionaries were lexemes deemed reactionary or obsolete, i.e. not suiting, not fitting official propaganda.

for political purposes (Hayakawa 1947: 126). And this is the essence of using language for manipulative purposes: resorting to emotions is of utmost importance, as emotional memory is one of the most stable types of memories, emotions are stronger and more direct than logical reasoning, wherefore they are easier to model (cf. Moiseeva 2020). Louis de Saussure (2005: 16–17) talks about local and global manipulation strategies in his study entitled *Manipulation and Cognitive Pragmatics: Preliminary Hypotheses*. Among local strategies, the researcher includes production of fuzziness, rhetorical questions, presuppositional assertion, misuse of concepts, and pseudo-mystical discourse, while global strategies encompass spreading and repetition of specific connotative words, i.e. words that under normal circumstances trigger implicatures (or presuppositions) with symbolic weight; generalization of a new terminology; elimination of some lexical items from public discourse; unmotivated or misleading analogies; acronyms, abbreviations, numbers; naming of elements of the everyday environment.

The analysis we have conducted upon the corpus has led to the conclusion that some of the most effective tools of manipulation are, in fact, the means used by PC language to redesign language: euphemizing, substitution of concepts, reconfiguration of word semantics, generalization and implicatures, spreading connotations, word bans, misleading analogies. These are, in fact, the social processes that take place during the course of implementing and imposing politically correct discourse and language: the PC Newspeak appears as a transcendent-like dogma created and imposed by benevolent and over-competent language users who have a superior skill of perceiving which word is good and which word is bad, and they try to eradicate all bad words for the sake of the speakers, to establish and maintain social harmony.[5]

5 Besides these strategies, we can also re-read what Orwell wrote in 1946 about the *bad way* and eluded semantics of English language: "As soon as certain topics are raised, the concrete melts into the abstract and no one seems able to think of turns of speech that are not hackneyed: prose consists less and less of *words* chosen for the sake of their meaning, and more and more of *phrases* tacked together like the sections of a prefabricated hen-house" (Orwell 1946). What is more, he also offers a list of such linguistic *swindles and perversions*, i.e. *tricks* with which the meaning of words and language can get completely derailed, a list which foreshadows some of the semantic tactics of PC language: "OPERATORS OR VERBAL FALSE LIMBS. These save the trouble of picking out appropriate verbs and nouns, and at the same time pad each sentence with extra syllables which give it an appearance of symmetry. Characteristic phrases are *render inoperative*, *militate against*, *make contact with*, *be subjected to*, *give rise to*, *give grounds for*, *have the effect of*, *play a leading part (role) in*, *make itself felt*, *take effect*, *exhibit a tendency to*, *serve the purpose of*, etc., etc. The keynote is the elimination of simple verbs. Instead of being a single word, such as *break*, *stop*, *spoil*, *mend*, *kill*, a verb becomes a *phrase*, made up of a noun or adjective tacked on to some general-purpose verb such as *prove*, *serve*, *form*, *play*, *render*. […] Simple conjunctions and prepositions are replaced by such phrases as *with respect to*, *having regard to*, *the fact that*, *by dint of*, *in view of*, *in the interests of*, *on the hypothesis that*; and the ends of sentences are saved by anticlimax by such resounding commonplaces as *greatly to be desired*, *cannot be left out of account*, *a development to be expected in the near future*, *deserving of serious consideration*, *brought to a satisfactory conclusion*, and so on and so

## 6. Corpus analysis

Our aim is to conduct a qualitative corpus analysis for pursuing in-depth investigations and explorations of linguistic phenomena that can be spotted in politically correct language usage. For this purpose, we have construed a corpus of politically incorrect and politically correct linguistic units. We have based our linguistic investigations on actual instances of written communication: this qualitative corpus analysis includes the computer-aided retrieval of authentic examples of the language phenomena under investigation (relying on dictionaries, glossaries, articles, websites, etc.), further interpreting these data in depth by applying some lexico-semantic and pragmatic criteria to a broad range of linguistic units. The corpus under analysis in this ongoing research includes multilingual reference texts in the topic of political correctness. The research

forth. PRETENTIOUS DICTION. Words like *phenomenon*, *element*, *individual (as noun)*, *objective*, *categorical*, *effective*, *virtual*, *basic*, *primary*, *promote*, *constitute*, *exhibit*, *exploit*, *utilize*, *eliminate*, *liquidate*, are used to dress up a simple statement and give an air of scientific impartiality to biased judgements. Adjectives like *epoch-making*, *epic*, *historic*, *unforgettable*, *triumphant*, *age-old*, *inevitable*, *inexorable*, *veritable*, are used to dignify the sordid process of international politics, while writing that aims at glorifying war usually takes on an archaic colour, its characteristic words being: *realm*, *throne*, *chariot*, *mailed fist*, *trident*, *sword*, *shield*, *buckler*, *banner*, *jackboot*, *clarion*. Foreign words and expressions such as *cul de sac*, *ancien regime*, *deus ex machina*, *mutatis mutandis*, *status quo*, *gleichschaltung*, *weltanschauung*, are used to give an air of culture and elegance. Except for the useful abbreviations *i.e.*, *e.g. and etc.*, there is no real need for any of the hundreds of foreign phrases now current in the English language. Bad writers, and especially scientific, political, and sociological writers, are nearly always haunted by the notion that Latin or Greek words are grander than Saxon ones, and unnecessary words like *expedite*, *ameliorate*, *predict*, *extraneous*, *deracinated*, *clandestine*, *subaqueous*, and hundreds of others constantly gain ground from their Anglo-Saxon numbers. The jargon peculiar to Marxist writing (*hyena*, *hangman*, *cannibal*, *petty bourgeois*, *these gentry*, *lackey*, *flunkey*, *mad dog*, *White Guard*, etc.) consists largely of words translated from Russian, German, or French; but the normal way of coining a new word is to use Latin or Greek root with the appropriate affix and, where necessary, the size formation. […] The result, in general, is an increase in slovenliness and vagueness. MEANINGLESS WORD. In certain kinds of writing, particularly in art criticism and literary criticism, it is normal to come across long passages which are almost completely lacking in meaning […]. Many political words are similarly abused. The word *Fascism* has now no meaning except in so far as it signifies 'something not desirable'. The words *democracy*, *socialism*, *freedom*, *patriotic*, *realistic*, *justice* have each of them several different meanings which cannot be reconciled with one another. In the case of a word like *democracy*, not only is there no agreed definition, but the attempt to make one is resisted from all sides. It is almost universally felt that when we call a country democratic, we are praising it: consequently, the defenders of every kind of regime claim that it is a democracy, and fear that they might have to stop using that word if it were tied down to any one meaning. Words of this kind are often used in a consciously dishonest way. That is, the person who uses them has his own private definition, but allows his hearer to think he means something quite different. Statements like *Marshal Petain was a true patriot*, *The Soviet press is the freest in the world*, *The Catholic Church is opposed to persecution*, are almost always made with intent to deceive. Other words used in variable meanings, in most cases more or less dishonestly, are: *class*, *totalitarian*, *science*, *progressive*, *reactionary*, *bourgeois*, *equality*." (Orwell 1946)

is based on corpus construction, sampling by word mining and extraction of relevant lexical patterns and semantic analysis. The steps of corpus construction have been the following: 1. running a keyword search to identify and compile texts for the corpus (keywords used for this step have been *political correctness*, *politically correct*, *PC language*); 2. collection of written texts in digital form (authentic language materials based on communication acts such as newspaper articles, magazine articles, websites, word lists, advice columns on how to use language sensitively, essays, textbooks, opinion articles; 3. engagement in the qualitative analysis of these texts, extracting keywords around which the message of these texts is built, i.e. concordancing and sorting only keywords relevant to the topic and analysing their context and signification. Thus, after generating raw keyword lists, quantitative concordance outputs have been explored, i.e. in our study we have focused not on function words but rather on content words (noun phrases and adjectives mainly), lexis and context of usage of linguistic units that appear to be perceived as politically correct, comparing the meanings of uses of such units with others which have been described as incorrect. We have relied on different types or samples of writing, attempting to explore semantic issues and emotional tone. We have not run quantitative analyses, we have not intended to use frequency analysis, although we are aware that such steps could be further performed, perhaps combined with sentiment analysis, combining text mining and opinion mining techniques. In this study, we have focused mainly on English texts.

In this article, we analyse these terms by taking into account the criterion of the semantic processes which occur in the creation of politically correct terminologies. In the case of politically correct and incorrect word usage, we deal with pairs of words (sometimes series of PC variants), out of which one is perceived as being harmful from the viewpoint of sensitivities, and all the others emerging from the desire to correct insensitive or exclusive verbal behaviours.

The language which created and promoted PC language is English, especially American English, although some principles and phenomena have rapidly spread in other languages as well. While some principles may be considered as useful, such as shifting the perspective from the disability to the person (*the disabled / people with disabilities or disabled people*), some other phenomena may signal the fact that English-speaking cultures cope with realities such as dying, aging, being ill, putting people in difficult situations, poverty, lack of intelligence or willingness to work, committing crimes, acting illegally, being different or acting differently than the standard. This tendency to avoid naming such things in a straightforward manner, and trying to embellish or enhance things that are perceived as sensitive, belittling, leads to a linguistic embroidery which has the purpose of meliorating meanings but very often targeting words which have not undergone a process of pejoration.

From the viewpoint of lexico-semantic phenomena and word formation techniques, we have spotted the following (The first unit listed is the politically incorrect variant, while the second is the one which has been described as politically correct.):

**– Using synonyms:** *fat/overweight*; *forefathers/ancestors*, *forebear*; *manpower/personnel*, *human resources or staff*; *jungle/rainforest*; *swamp/wetland*; *disabled/inconvenienced*; *suicide/autoeuthanasia*, *spiritually dysfunctional*, *voluntary death*;

**– Using a (circular) definition:** *negro/black*, *coloured*, *Afro-American*, *African-American*, *people of colour*, *skin-melaninated*, *sun people* (Sometimes slight modifications of dysphemisms can make them acceptable: while *coloured people* is considered dysphemistic, *people of colour* does not carry the same connotations); *white/melanin-impoverished*, *member of the mutant albino genetic-recessive global minority* (one of the many implicatures is that being white is the same as suffering of albinism, this compound being the only case making use of the noun *minority*, elsewhere doomed as culturally insensitive), *mutant albino genetic-recessive global minority*, *person of non-colour*; *hyperactive children / child with an attention deficit disorder*, *attention deficit disordered children*; *incorrect / alternative answer*; *lie/misspeak*, *inoperative statement*, *carefully crafted*, *nuanced answers*; *liar / a person creative with the facts*; *falsifying official documents / cleaning up the historical record*, *false testimony / testimony that is fixed by omission*; *minority group / numerically challenged group*; *a woman / person of gender*; *disability / human difference*; *insanity / mental activity at the margin*; *individuals with a disability / people with special needs*; *physically disabled / physically challenged*, *physically different*; *unemployed / in an orderly transition between career changes*, *indefinitely idled*, *non-waged*, *occupationally dispossessed*, *vocationally deprived*;

**– Using a hyponym or hypernym:** *Oriental/Asian*; *maternal/parental*; *father/parent*, *co-parent*; *wife*, *husband/spouse*; *girlfriend*, *boyfriend/partner*; *nature/environment*; *intelligent/intuitive*; *Merry Christmas / Season's Greetings*;

**– Using a hyponym or hypernym and an explicitation:** *mother / first biological parent*; *father / second biological parent*;

**– Using coinage and substitution of concepts** (none of the newly coined words has been listed in dictionaries): *girl/pre-woman*; *breastfeeding/chestfeeding*; *manage/womanage*; *amen/awomen*; *history/herstory*; *actor*, *actress/actron*; *mankind / Earth children*; *efemcipated* = emancipated especially as it applies to the liberation and empowerment of women; *ego-testicle worldview* = men's point of view on all issues; *manhole/femhole* (= a replacement for the word "manhole" to dramatize the linguistic and cultural erasure of women in the electrical and sanitation trades); *woman/wofem*, *womban*, *womon*, *womyn*, *woperson*;

**– Using euphemisms or meliorating roundabouts:** *illegal immigrants / undocumented immigrants*; *wrong/inappropriate*; *shell shock (World War I) → battle fatigue (World War II) → operational exhaustion (Korean War) → post-*

*traumatic stress disorder (Vietnam War)*; *ignorant / knowledge base non-possessor or factually unencumbered*; *stupid/cerebro-atmospheric individual, intellectually challenged*; *boring/charm-free, differently interesting*; *ugly / cosmetically different*; *old / chronologically gifted, experientially enhanced, longer-living, mature, senior, seasoned*; *blind / optically inconvenienced or challenged*; *dead / metabolically challenged*; *limited English proficient students / linguistically diverse students*; *illegal acts / inappropriate actions*; *a child with a learning disability / acceptional child*; *hard-of-hearing, deaf / aurally inconvenienced, aurally challenged, visually oriented*; *stupid, insane / cerebrally challenged, mentally challenged, selectively perceptive*; *mentally retarded / developmentally challenged, developmentally inconvenienced*; *physically or mentally disabled / differently abled*; *mentally retarded or physically disabled / exceptional, uniquely abled, special*; *psychologically disturbed, crazy / emotionally different*; *nearsighted, or farsighted, or blind / optically inconvenienced, optically challenged, unseeing, non-sighted*; *having a speech impediment, mute / orally challenged, vocally challenged*; *having no physical or mental disabilities / TAB or temporarily able-bodied person, temporarily able*; *disease/condition*; *retard / late developer, chronic underachiever, less prepared individual, mentally challenged person*; *psychotic or psychopath / socially misaligned*; *people who for the moment at least are not homeless / non-vagrant homed, temporarily homed* (the presupposition is that not being homeless is only temporary); *homeless / residentially flexible*; *anti-social / difficult to serve*; *cigarette smoking / assault with a deadly weapon*; *drug addiction / pharmacological preference*; *alcoholic, a drunk / person of differing sobriety, substance abuse survivor, person of stupor, wino*; *a prisoner / client of the correctional system, guest in a correctional institution*; *convict / socially separated*; *felons / criminalized populations* (the implicature is related to an emphasis on being criminalized by others, relief from personal responsibility); *prison cell / custody suite*; *patient, inmate, prisoner/guest*; *poor / differently advantaged, economically exploited, economically marginalized, low-income*; *a loser, a failure / individual with temporarily unmet objectives, incompletely successful individual, uniquely-fortuned individual on an alternative career path*; *lazy / motivationally deficient, motivationally dispossessed*; *misbehaviour / negative attentive getting*; *poor speller/orthographically challenged*; *sloppy / specially organized, non-traditionally ordered*; *incompetent / specially skilled, uniquely proficient, differently qualified*; *malpraxis / diagnostic misadventure of high magnitude, therapeutic misadventure*; *mistake/misadventure*; *death/dysfunction, failure to fulfil one's wellness potential*; *kill or assassinate/neutralize* (again, an interesting case, taking into account the positive connotation of *neutral* in PC); *dead, wounded* or *destroyed / no longer a factor*; *corpse / non-living person*; *alive / temporarily metabolically abled*; *recession (or depression) / meaningful downturn, period of economic adjustments, period of negative economic growth, temporary interruption of economic expansion*; *losses / negative cash flow*; *an obese or fat person /*

*alternative body image*, *differently sized*, *horizontally challenged*, *big-boned*, *larger-than-average citizen*, *person of size*, *person of substance*, *physically challenged*, *heavyset*, *heavily laden*; *false teeth / alternative dentation* (*alternative* is usually the euphemism for *false*); *uneducated*, *illiterate / alternatively schooled*; *accident/ anomaly*; *murder / arbitrary deprivation of life*; *war / mutually empowering shared experience*; *broken home / dysfunctional family*;

**– Using an acronym:** *AIDS/PWA (person with AIDS)*; *venereal disease / STD (sexually transmitted disease)*, which was later replaced by *STI (sexually transmitted infection)*; *BC/BCE Before Common Era*; *AD/CE Common Era*;

**– Using contracted forms, usually apocopes**: *Founding Fathers / founders*;

**– Using non-synonyms or antonyms together with or without *differently***: *bad/different*; *spacey / differently focused*; *wrong / differently logical*; *mistaken / differently opinioned*; *ignorant / differently wise*; *dishonest / ethically disoriented*, *morally different*, *differently honest*; *worst/leastbest*; *dishonest*, *immoral*, *evil / morally different*; *failure / incomplete success*, *deficiency achievement*;

**– Using dysphemism or using misleading analogies, i.e. items which induce negative judgement and criminalize the referent**: *dominant/oppressive* (although dominant is not necessarily oppressive); *conservative/reactionary*; *hunter/ Bambibutcher*; *rancher / cattle murderer*; *farming / exploiting mother Earth*; *fishing / raping the planet's oceans*, *rivers*, *and lakes*; *lumberjack / tree butcher*; *logger / tree slayer*; *forest management / killing trees*; *marriage / domestic incarceration*, *legalized rape*.

Very often a word is degraded to the status of politically incorrect term, but no alternative is provided (*flush toilet*, *saint*, *black sheep*, *genius*, *brilliant*, *flair*, *exotic*, *violate*). Very often the PC euphemism introduced to replace the uncomfortable word becomes inadequate after a while and is replaced by a new creation; thus, PC words can quite rapidly become obsolete, perhaps due to the fact that they have been introduced artificially; the almost circular movement from *old person* to *senior citizen* and back to *older person* is a symptom indicating that words belonging to the core vocabulary cannot simply be banned and replaced with others. In this case, the phenomenon of linguistic reclamation, reappropriation or resignification has taken place. What is more, it is obvious that in the field of PC word creation we witness the *euphemism treadmill* or *euphemism cycle*, i.e. the process by which a euphemism falls into disgrace, it becomes socially unacceptable and is replaced by a new one. (The term *euphemism cycle* was introduced by Sharon Henderson Taylor (1974), whereas *euphemism treadmill* was coined by Steven Pinker (1994), to describe the process in which terms with an emotionally charged referent, which were once euphemisms, become dysphemistic by association with the referent.)[6]

6 Even *politically correct* seems to have entered this treadmill, as it has started to be replaced by *culturally sensitive*.

Although English lexicologists do not operate the division of the lexicon into the *core* or basic vocabulary and the *supplementary* vocabulary, we must mention that many linguists (such as Zsemlyei 2014) have the tendency to talk about these two layers of the lexicon. The core vocabulary (*Der Grundwortschatz*, *Basiswortschatz*, *Gebrauchswortschatz*, *Minimalwortschatz* in German, *fond principal lexical* in Romanian, and *alapszókészlet*, *alapszókincs* in Hungarian) is the essential part of the vocabulary of a language, characterized by great stability, comprising all the words with high frequency, which usually refer to fundamental notions, everyday concepts and which are, in general, the oldest words of the language, with many derivatives and many expressions and phrases. They are known to all members of the language community, and they include the names of: basic actions, body parts, natural objects, phenomena, house and living, numerals, pronouns, kinship names, temporal and spatial comparative words. Words belonging to the core vocabulary are very stable and change with great difficulty. That is why we tend to think that the replacement of words belonging to the core vocabulary, such as pronouns, family members, or basic adjectives, cannot, should not, and will not be replaced by their politically correct alternatives: *he*, *she*, *mother*, *father*, *wife*, *husband*, *old/young*, *good/bad*, *black/white*, etc.; nevertheless, if such an imposed linguistic cleansing will take place, what will happen to the derivates or compounds made up of such units: *motherly*, *fatherly*, *mother tongue*, *mother nature*, *mother-in-law*, *pollen mother cell*, *grandmother*, *motherhood*, *Father Christmas*, *father-in-law*, *father figure*, *grandfather*, *spiritual father*, *fathering*, *midwife*, *housewife* (not to mention idioms and sayings)? In many cases, the reason for banning a word is to avoid discrimination, but the ban imposed on the degraded word and the import of PC alternative(s) practically bring about new levels of discrimination or ranking, such as in the case of replacing *father*, *mother* with *first biological parent* and *second biological parent*, the very usage of *first* and *second* introduces the presupposition that one of them comes first and the other is of secondary rank or importance.

Very often the PC-generated linguistic changes (semantic and lexical changes alike) are fuelled by the fundamental disbelief that all that is old is bad and all that is new is good. As Hayakawa puts it, "language is the indispensable mechanism of human life—moulded, guided, enriched, and made possible by the accumulation of the past, i.e. language deposits the experiences of members of our species" (Hayakawa 1947: 14). Pejoration and melioration rarely work upon core vocabulary and rarely affect the grammar; thus, language evolution has not affected substantially the immutable core vocabulary. The core lexicon is not a set of semantically unstable words, and the Swadesh list,[7] which gathers some of the oldest and most stable semantic universals which are used in the research and analysis of genealogical relatedness of different languages, does include

7 https://en.wikipedia.org/wiki/Swadesh_list.

among its members the personal pronouns *he*, *she* and lexemes such as *mother*, *father*, *woman*, *man*, *husband*, *wife*, proposed by a twitter posting for dismissal as they are deemed unacceptable.[8] The derogatory overtones attached rather arbitrarily to these lexemes do not belong to the words themselves but rather to the speaker's interpretation, which depends on the interpreter's or speaker's background knowledge or experience and the representations stored in one's own mental lexicon. Dooming these core vocabulary words seems to be based on overgeneralization and the spread of connotations, which are otherwise not very likely to be assumed by all speakers of all languages.

In an effort to show no disrespect for anyone, promoters of political correctness largely succeeded in reducing the number of names which they have perceived as offensive or inaccurate. By wanting to be less harmful, PC language seems to flout politeness rules (see Brown and Levinson 1987), and they have imposed restrictions and speech codes, by failing to observe negative face. In other words, the constant efforts to reduce threat to positive face and the struggle to emphasize in-groupness, solidarity, and the need to be liked and accepted, i.e. positive face, have inevitably led to a complete disrespect of negative face, i.e. the human beings' fundamental need not to be imposed upon by others.

PC language is always hypercorrect language, as the very purpose of PC is correcting social and linguistic fallacies. However, hypercorrection in linguistics is, in fact, lack of correctness or inaccuracy, and a typical example of such hypercorrection is the usage of *amen* and *awoman*, as a gesture towards gender neutrality and to avoid potential discriminatory connotations of the word *amen* (which has nothing to do with the noun *man*).[9]

## 7. Conclusions

The most widespread feature of PC is the regulation of speech by banning presumably offensive words and verbal expressions in the public media, as well as public institutions like schools, hospitals, or administrative agencies, notes Geser (2008: 2). "We are left with the following questions: what happens if one sees things politically incorrect? If one observes that the relation between men and women seems to have turned to a narrow minded book keeping, since claims

8 https://gript.ie/united-nations-politically-incorrect-terms-including-husband-wife/.

9 The affix *man* was gender neutral in OE and had (as it still has today) the neutral meaning of person; to express gender, one had to use a composite, such as wifman for woman and waepman for man. Therefore, a compound like *chairman* is a perfectly gender-neutral expression, and the whole discussion about replacing the compounds containing the morpheme *man* (*manpower/personnel*, *human resources chairman/chair*, *congressman/legislator*, *businessman/representative*, *salesman/salesperson*, *man-made/artificial*, *mankind/humanity*, *postman/postal worker*, *taxman/tax officer,* etc.) seems meaningless.

of feminism have been trivialized? If one is sceptical of globalism? If one sees the implementation of peace as the established order of the mighty?", asks Klotz (1999: 156) rhetorically.

PC tends to overlexicalize[10] certain preferred areas, although in natural language changes the law of synonymic attraction demonstrates that subjects prominent to all members of a certain community tend to generate a significant number of synonyms. The generation of synonyms in PC fashion makes words stylistically and emotionally marked, which leads to the creation of euphemisms. Word creation in PC languages relies on word coinage, composition by juxtaposition and affixation, inducing new synonymic series, in which *Oldspeak* lexemes are supposed to be replaced by *Newspeak* variants. Among the newly created synonymic relations we mention: *illegal = undocumented*, *false = alternative*, *wrong, bad = inappropriate*, *malfunctional = challenged*, *disease = condition*, *disturbed = different.*

The mechanism of replacement is therefore often based on stigma allotment, oriented towards words and the referents they name. Stigmatized, and thus banned, words carry some induced semantic changes which do not occur naturally, and these changes affect the core vocabulary, the language universals, based on the premise that "if thoughts can corrupt language, language can also corrupt thoughts" (Orwell 1946: 259). PC language might be acceptable in technolects, standardization of terminology (such as the case of *crippled/ disabled*) but hardly acceptable or logical in general language, as it will end up in becoming a *Newspeak* or what the French call *langue de bois*, i.e. a string of ready-made thoughts and ideology-based language units resulting from a process of linguistic purging.

Therefore, the PC language *reform* means acting on the semantics of core lexicon words, aiming to change a lot, very quickly, wherefore it seems to be an outer intervention on language, a top-down process of semantic shift. The ban which is forced upon the usage of *he*, *she*, *man*, *woman, husband*, *wife*, etc. makes us consider PC a form of cultural intervention, which presupposes that language is in crisis and intervention is needed and meant to restore order and normality by habit formation. Language and emotions are two parallel, concurrent systems. There are a lot of overlaps between them; nevertheless, one should not confuse them, and hence attempt to change one in order to automatically change the other. The linguistic system is asymmetrical, as it is based on hierarchical oppositions; eliminating or neutralizing all asymmetries may lead to the

10 Overlexicalization is accompanied these days with a deconstruction or reformulation of previously popular maxims or aphorisms such as knowledge is power, reduced today to information is power, downplaying the significance and importance of acquiring knowledge and implementing the misbelief that it is enough to be informed instead of being educated. Among other similar misconceptions are: all that is new is good, and all that is old is bad; competence is more important than knowledge, etc.

impossibility to communicate. Language which prides itself in being neutral is fundamentally emotive,[11] it expresses emotions and attitudes, it decrees what is good, what is bad, what is appropriate, it makes moral judgments on semantic aspects, it stigmatizes words to destigmatize groups, it interprets non-emotional texts as emotionally loaded and in need of being even more neutralized through the usage of over-inflated linguistic items.

As George Orwell puts it:

> [t]he inflated style itself is a kind of euphemism. […] The great enemy of clear language is insincerity. When there is a gap between one's real and one's declared aims, one turns as it were instinctively to long words and exhausted idioms, like a cuttlefish spurting out ink. In our age there is no such thing as "keeping out of politics". All issues are political issues, and politics itself is a mass of lies, evasions, folly, hatred, and schizophrenia. When the general atmosphere is bad, language must suffer. (Orwell 1946)

PC has introduced the concepts of *guilty words* and *guilty language* and *good words* and *good language*. Linguistic judgements made upon words make us classify words into *snarl* words and *purr* words, politically correct words and politically incorrect words, or good words and bad words. Nevertheless, we should be careful with allocating the meaning correctly and be aware that snarl words and purr words, emotional words express the *speaker's state of mind* and not facts about something. This means that classifying words into categories, making moral judgements about them will eventually slant the story in one direction, it will induce biases; however, discovering and admitting one's own biases is the beginning of wisdom (Hayakawa 1947: 45–50). What is more, language changes should not rely on moral judgements upon words, and they need not take the form of a warfare against words. PC language does not seem to work in the direction of rectifying language, rather it seems to induce phenomena that will finally lead to what Confucius refers to: the necessity of restoring meaning and making words *name* reality and not (de)*form* reality.

11 Though neutral language is not meant to communicate emotions or to make the listener adopt those emotions. See also the difference between the informative function of language and its expressive or emotive functions or the difference between representative speech acts and expressive speech acts.

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# Crisis and Language in Ray Bradbury's *The Last Night of the World*

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**Abstract.** Language use in social crisis situations is usually described as being highly ideological, and it exhibits features of affect involving the use of negative evaluation of the perceived social enemies. The present study aims to explore the characters' language use in Ray Bradbury's short story entitled *The Last Night of the World* from a pragma-stylistic perspective. The fictional dialogue that takes place between the two protagonists creates and reflects the dynamics between them, where the unspeakable is only inferred rather than communicated. The analysis reveals special features of verbal communication in a crisis situation, especially focusing on the lexical and morphosyntactic properties, as well as on the verbal interaction and cooperation between the characters revealing their alignment. The results of the analysis prove that the verbal and non-verbal communication between the protagonists do not show the features described in crisis communication; therefore, the text of the story can be interpreted as subverting the generic language use in a critical situation.

**Keywords:** pragmalinguistic, fictional dialogue, crisis, dialogue

## Introduction

Times of crisis occur in human life from time to time, and it can be literally vital how the people involved are affected by them: either as passive sufferers or as active shapers of events. Crisis situations have also been depicted in literary texts, and one of the main domains where such situations play a central role is science fiction literature. The present study proposes to examine the textual world of Ray Bradbury's short story entitled *The Last Night of the World* from a pragma-stylistic perspective, more specifically to have an insight into the conversation between the two characters. The short story, one of Bradbury's masterpieces, is particularly well-suited to address the topic of crisis and language relation. The linguistic approach to the text is meant to offer a rigorous analysis of the verbal

manifestations of the two protagonists of the short story, through which their interrelationship and attitude towards each other and the world around them in a time of crisis can be perceived. The analysis is intended to approach the language of crisis as manifested in personal relationships and verbal exchanges, reflected in a sample of American fiction, testing the major hypothesis of the study as to whether the language of crisis as it is regularly described by the literature of the domain is confirmed or subverted by the Bradburian short story.

The structure of the study is as follows: First, the basic concepts of crisis and science fiction are defined, followed by a short survey of Ray Bradbury's oeuvre, especially focusing on the short stories of his volume *The Illustrated Man* (1951). A brief introduction into the language of crisis is then presented, followed by the methodological issues related to the analysis of verbal exchanges. The dialogue of the short story *The Last Night of the World* is then closely followed from a pragma-stylistic perspective, concluding with the results of the analysis and an outlook to some further research.

## 1. Genre, crisis, and language

The short story to be analysed belongs to the genre of science fiction defined by the *Oxford Dictionary of Literary Terms* (Baldrick, ed. 2015) as "a popular modern branch of prose fiction that explores the probable consequences of some improbable or impossible transformation of the basic conditions of human (or intelligent non-human) existence". "It is a genre of fictional literature with imaginative content, but which is based on science. It relies heavily on scientific facts, theories, and principles as support for its settings, characters, themes, and plot-lines, which is what makes it different from fantasy."[1] Its authors use real science to create fictional stories to explore the possible future of mankind and the universe in a way that is both imaginative and realistic. In other words, science fiction is "a form of fiction that deals principally with the impact of actual or imagined science upon society or individuals".[2] Although earlier considered as a type of pulp fiction, the genre has gained greater respect in the 1950s due to the writings of Americans Robert Heinlein, Isaac Asimov, and Ray Bradbury and the British Arthur C. Clarke.

A more thorough consideration of the genre[3] (cf. Booker–Thomas 2009, Booker 2012, Hubble–Mousoutzanis 2014, Roberts 2016, Canavan–Link 2019) reveals that science fiction is usually distinguished as "hard" and "soft". While hard science fiction strictly follows scientific facts and principles, with its fixation on science and technology, focusing on natural sciences such as physics or

1 https://literaryterms.net/science-fiction/.
2 https://www.britannica.com/art/science-fiction.
3 https://www.britannica.com/art/science-fiction.

astronomy, soft science fiction mainly focuses on social sciences involving human behaviour, such as psychology, politics, sociology, or anthropology, which entails that soft science fiction stories are mainly concerned with the possible scientific consequences of human behaviour, the aspects of near future, and "inner space". Ray Bradbury is one of the early representatives of "soft" science fiction. He is mainly interested in the advancement of science and technology according to its consequences on human beings and their character, having at their centre humans with their ordinary hopes and flaws, describing apocalyptic situations humans can cause themselves. His masterpiece, *Fahrenheit 451*, is a typical case in point. Bradbury's several short stories actually take place on Earth, and more often than not the stories are restricted to a small, familiar locale.[4]

One of the common topics of science fiction is linguistic connection with other civilizations, other intelligent beings in the universe. According to Walter E. Meyers (1980), science fiction is frequently concerned with the idea of communication, either with aliens and machines or using dead languages and languages of the future. In soft science fiction, however, an example of which is *The Last Night of the World*, human communication is at the centre of the text. As the conversation occurs in a critical situation, the concept of "crisis" will be briefly introduced in the following, while in the last section the language use of people in crisis situations will be outlined.

In general terms, crisis is defined as "a time of great danger, difficulty or confusion when problems must be solved or important decisions must be made" (*Oxford Advanced Learner's Dictionary*). It also refers to a critical decisive moment when things are usually uncertain, difficult, or painful; a time when something very important for the future happens and when actions must be taken to avoid complete disaster or breakdown. On the other hand, "crisis is not necessarily a bad thing. It may be a radical change for good as well as bad" (Friedman 2002: 5, qtd. in Coombs 2010: 18). All these definitions are relevant when approaching the language of *The Last Night of the World* from a pragma-stylistic viewpoint due to the fact that – as the title of the short story indicates – the text presents a narrative and a dialogue in a fictional crisis situation set in a time of imaginary future. As the focus of this paper is on crisis communication, my approach is of linguistic nature.

Research has shown (cf., among others, Sellnow–Seeger 2013, Coombs–Holladay (eds) 2010, Chilluva–Ajiboye 2016) that language use in crisis situations is usually described as being highly ideological, and it exhibits features of affect involving the use of negative evaluation of the perceived social enemies. It intrinsically involves the expression of anger, fear, frustration, and it frequently entails the use of rhetorical elements such as exaggeration, metaphor, and irony – the tropes of indirect communication marking the speaker's detachment from the events eliciting their negative feelings.

4 http://www.editoreric.com/greatlit/authors/Bradbury.html.

In this context, the term "crisis talk" is also brought into discussion, defined as "a dialogue genre that occurs in threatening situations of unpredictable outcome, with no obvious way out, and requiring spontaneous decision, unconventional strategies and unrehearsed actions in order to be mastered" (Sassen 2003: 45). As opposed to classical dialogues where the Gricean cooperative principle and the four maxims of quality, quantity, relation, and manner are followed, crisis talk is "disfluent, violates the Gricean maxims, is usually emotional, has high taboo word frequency, unterminated *uptake loops* (Gibbon 1981), *reprise utterances* (Ginzburg et al. 2001), and greater speech output quantity" (Sassen 2003: 45, emphases in the original). In the analysis of the Bradburian short story, it will be tested whether the characters' conversation can be described by these linguistic markers of crisis talk, in other words, whether the crisis situation is verbally reflected in the text.

## 2. The short story and its writer

Ray Douglas Bradbury (22 August 1920–5 June 2012) is an American fantasy, science fiction, horror, and mystery fiction author. Worldwide he is mostly famous for his novel entitled *Fahrenheit 451* (1953), but he is also known for hundreds of short stories written in the genre of science fiction. Some of his short story collections are: *The Martian Chronicles* (1950), *The Illustrated Man* (1951), and *I Sing the Body Electric* (1969), which made Bradbury become one of the most celebrated 20th-century American writers.

Bradbury's *The Last Night of the World* was originally published in the February 1951 issue of *Esquire* magazine, republished later that year in his collection of science fiction short stories entitled *The Illustrated Man*. The volume contains eighteen stories, the recurring topics of which are the harsh mechanics of technology and the psychology of people. Though apparently unrelated in their themes, the stories are still connected to each other by the frame story of the illustrated man, who is a vagrant former member of a carnival show, of an exhibition of biological rarities. The man's body is covered in tattoos which are individually animated, and each tells a different tale, representing visions of frightening futures. It must be remembered that – as several allusions are made to a war happening – the short story was written six years after the Second World War, four years into the Cold War, and one year into the Korean War.

As mentioned above, the story is a typical example of soft science fiction, as it does not mention any ray guns, space battles, green aliens with tentacles, or interplanetary politics. The story is relatively short and simple. The time is an explicitly stated day in the future, 19 October 1969, but one of the characters' fears of the atomic bomb and germ warfare point to the anxieties that characterized the America of the 1950s, when the short story was published. A couple awakens to

the knowledge that the world is going to an end that very evening. Nonetheless, they go through their normal evening routines, acting and conversing calmly waiting for "the last night of the world". Finally, they put their children to bed, and they go to bed themselves, saying good night to each other with their hands clasped and heads put together. The summary of the story foretells the protagonists' "irregular" verbal and non-verbal behaviour regarding "regular" crisis communication outlined above. These irregularities will be pursued in the following analysis.

## 3. Methodology: Approaching fictional dialogue with pragmatic and stylistic means

The text of the short story will be analysed from a pragma-stylistic viewpoint, highlighting those aspects of the characters' conversation that reveal the verbal cues standing behind the speech context. It wishes to continue the line of research carried out in the domain of linguistic approach to literary texts (see Toolan 1985, 1987; Simpson 2004; Leech–Short 2007; Bronwen 2012; Short 2014; Lambrou 2014; Bousfield 2014; Chapman 2014; Nykänen–Koivisto 2016, among others). The linguistic analysis wishes to illuminate the interpretation of this piece of literary text by examining how the verbal behaviour of the characters underpins or even emphasizes one reading of the short story. The characters' speech, the language they use conveys "additional messages" about them to the audience (Short 1989: 149), while the "textual cues" (Culpeper 2001: 163) invite them to make inferences about the characters' personalities and motives. The pragmatic stylistic approach combines approaches from pragma-linguistics and -stylistics by answering questions about "how (literary) language is used in context and how it contributes to the characterization of protagonists in a literary piece of art or how power structures are created" (Nørgaard et al. 2010: 39). Following the line of research carried out in this borderline area, we are going to make use of pragmatic models of speech act theory, the cooperative principle and the conversational maxims, as well as methods of conversation and discourse analysis.

In this study, fictional dialogue is understood as a passage of character–character conversation, which has a double interpretation: on the one hand, it is a constructed text type, and, on the other hand, it makes use of the characteristics of everyday conversation. The techniques that have been developed by pragmaticians to analyse spoken (and written) conversation explore the patterns in the character speech including the areas of turn-taking, speech acts, inference, and implicature. Turn-taking, which looks at the processes involving conversational participants' contributions to a conversation in alternating turns, using a variety of linguistic and non-linguistic cues, is considered to be a good

way "to see the overall character relations in a conversation" (Short 2014: 347). Speech acts are related to language use in context. The central idea of speech act theory is that when uttering a sentence, one also performs some sort of action (e.g. the acts of asserting, ordering, expressing feelings, committing oneself to some future action, etc.). Last but not least, the term implicature refers to the speaker's intended meaning behind the uttered words, while inference indicates the meaning deduced by the hearer from what is actually said by the speaker, meaning being based on the Cooperative Principle and the speakers' mutual contextual beliefs. The above enlisted notions will be applied in the scrutiny of the Bradburian text in order to draw valid and reliable conclusions from the characters' verbal manifestations.

## 4. Quantitative and qualitative analysis

Applying the quantitative method in the analysis of the text, based on the word count of the Word software, it can be claimed that the story sums up a total of 1,269 words, the great majority of which (909 words) comprises the dialogue, encompassing 71.63% of the total number of words. The narration detailing the characters' actions and kinesic signals is covered by 360 words, i.e. 27.58% of the total number of words, which shows a ratio of approximately 2/3 : 1/3 (see *Figure 1*).

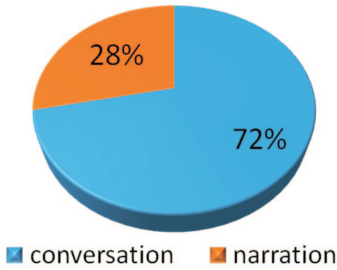


**Figure 1.** *Division of the text*

Counting the numbers of turns allocated to the two speakers, it can be observed that the speaking partners share a total number of 66 turns (adjacency pairs) of the conversation in equal measure, each having 33 turns, which shows a perfect balance and harmony between them. Thus, it can be inferred that neither of them is in power position, both contributing to the verbal exchange in an equal way.

In the following, we turn to the qualitative analysis of the text from the perspective of speech act theory and conversation analysis.

The temporal and spatial frame of the story is very restricted: the two characters are enclosed in a relatively restricted space – their home, together with their

two children playing serenely in the neighbouring room. The time frame is also reduced: the action takes place from early evening till almost midnight, but references are made to earlier events that took place days before in the man's office and related to the women in the block. The restricted time and space, the limited time span until the literally meant *dead* + *line* heightens the intensity of the verbal interaction of the two protagonists.

Dialogue – as defined by the OED – is "a conversation carried on between two or more persons; a colloquy; talk together". As highlighted by McIntyre (2016: 430), the term dialogue is frequently (mis)understood as "referring to speech between two persons, perhaps through associating *dia-* with *di-*" (i.e. "two") [emphasis in the original]. In the present short story, the term dialogue is referred to as *duologue* (the term also used by McIntyre, as opposed to "monologue"), a term for conversation between two persons specifically. This is especially important in this case, as there is an extremely intensive "togetherness", intimacy, and understanding in this dialogue, as the verbal interaction between them (and its analysis below) will hopefully demonstrate.

From a pragmatic perspective, more specifically, from a speech act theoretical point of view, a story itself can be viewed as an utterance: it begins with an abstract, followed by orientation, a narrative sequence that complicates the action, eventually coming to a resolution and ending with a more or less evaluative coda (see Traugott–Pratt 1980). The Bradburian story does not conform to this model. The narrative does not follow the standard structure of a story: there is no introduction or orientation, the author places the reader *in medias res*, the first line of the story being at the same time the introductory question of a conversation, having an astonishing content: "What would you do if you knew this was the last night of the world?" At this moment, there is no indication of the identity of either the addresser or the addressee or the circumstances of the exchange. The dialogue continues in a similarly vague vein:

(1) "What would I do? You mean seriously?"
"Yes, seriously."
"I don't know. I hadn't thought."

The reader is left in suspense regarding the identity of the initiator of the dialogue (for the sake of the analysis, at this moment called Speaker 1) and of the person answering the question (called Speaker 2). However, there are certain linguistic cues referring to their relationship: the informal style of the verbal interaction. The use of the second person singular pronoun "you", the relatively short adjacency pairs, the contracted forms of auxiliary verbs (*don't*, *hadn't*) mark the social proximity of the speakers. Furthermore, the conditional present used in the opening question indicates the insecurity implied by Speaker

1. The reply to the question seems irrelevant, as the replier (Speaker 2) returns the question with a similar question, being overwhelmed by the initiated topic. The uncertainty of Speaker 2 is further emphasized by the follow-up question ("You mean seriously?"), which refers to the seriousness of the suggestion, as if checking whether *Speaker 1* was only joking, i.e. whether he/she was actually cooperating with the speaking partner. Furthermore, the elliptic structure (lack of auxiliary in the question) also adds to the informality of the dialogue. This question does not provide a reply to the original question, but it refers to its mode of reference: enquiring about the implicature behind Speaker 1's utterance. It is only in turn 4 that the answer to the original question is provided ("I don't know. I hadn't thought."), implying that Speaker 2 is not prepared to face the critical situation implied by the initiator of the conversation.

It is only in line 5 of the text that the identity of Speaker 1 is partly revealed: "**He**[5] poured some coffee." This reference is made by the use of the third person singular masculine personal pronoun, which remains unspecified for the rest of the story, through which the character gains universal significance. It is also after the four initiating conversational exchanges that the spatial and temporal references are revealed, indicating a family home in the evening ("the two girls playing blocks" in the neighbouring room, "parlor rug", "hurricane lamp", "brewed coffee", "evening air"). From this context, it is a natural inference of the reader that the other person *He* is conversing with must be a *She*, i.e. the female protagonist. The relaxed, serene atmosphere of the domestic environment, also highlighted by the adjectives ("easy", "clean", "green") describing it, is heavily inconsistent with the topic discussed in the initial duologue (see the introductory section above). This incongruity foreshadows the crisis situation lurking in the background.

The seriousness of the opening question becomes even more urging when the man (who has been the initiator of the questions so far) continues with a suggestion: "Well, better start thinking about it." Apparently, he gives his wife a piece of advice (employing an elliptical structure instead of "you had better"), introduced by the hedge "well" in order to mitigate the face-threatening act implied by the suggestion. The man actually uses an indirect speech act, which has an indirect force as a directive ("Start thinking about it!"), implying that he addresses an imperative to his wife, from which it can be inferred that he is the more powerful in the relation. This powerful position is also underpinned by the facts that all through their conversation it is him who initiates most turns, speaks most words, and controls the topic. In spite of these conversational cues, there is no doubt that the woman might be in a less powerful position.

At this point, the two protagonists share their (and everybody else's) secret dream with each other as a sign of trust and closeness. This balance and bond existing between them is also detectable in the fact that they both initiate turns

5 Emphasis is mine, Zs. A.

and react to them in equal measure, keeping the balance of power. The topic of the turns consists first of the outside world surrounding them, then clarifying the reasons for "the end", and finally returning to their own private microcosm, sharing their thoughts and feelings, enlisting the losses they will miss. What is most surprising is that in spite of the imminent end, both their actions and interactions remain calm. There are no linguistic markers of tension or psychological stress in their verbal manifestations, the affective bond between them being maintained.

Their unity is also demonstrated by the specific use of personal pronouns in their conversation. Trying to find a logical reason for the end that evening, the following verbal exchange takes place between them:

(2) "You don't get too excited when you feel things are logical. This is logical. Nothing else but this could have happened from the way **we**'ve[6] lived."

(3) "**We** haven't been too bad, have **we**?"
"No, nor enormously good. I suppose that's the trouble. **We** haven't been very much of anything except **us**, while a big part of the world was busy being lots of quite awful things."

The 1st and 2nd person singular pronouns used so far in their statements and questions addressed to their partner change into the 1st person plural exclusive "we", involving both the speaker and the hearer. The pronoun *we* could also have a generic meaning, to be interpreted as including all the people on earth, but this interpretation is not valid in this context: it explicitly refers to themselves, that is, where the couple's remorse lies hidden. Although they were aware of the horrible events that were happening on earth, they did not stand up against them, they did not take any responsible action. They only cared about themselves, being self-absorbed and behaving in a very selfish way. Perhaps it is this feeling of remorse and detachment that makes them behave calmly and peacefully ("You don't scream about the real thing."). There is also a self-reflecting exchange that exhibits even their own surprise and bewilderment regarding their reaction (or, better said, non-reaction):

(4) "How can we sit here and talk this way?"
"Because there's nothing else to do."
"That's it, of course; for if there were, we'd be doing it."

It is noticeable that while in the first question the active voice is used to indicate the wish for action, the reply contains a structure with a dummy subject (no action is possible), while in the third turn the conditional present is used, in

6 Bold emphases are mine, Zs. A.

this case describing a hypothetical situation, "which is contrary to known facts" (Foley–Hall 2003: 122), denoting a condition that is impossible to fulfil. Several other cases of the use of the conditional present tense can be detected in the couple's conversation:

(5) "I wonder … **[i]f** the door will be shut all the way, or **if** it'll be left just a little ajar so some light comes in."
(6) "I wonder **if**[7] the children know."

All these grammatical structures mentioned above also underpin the feelings of uncertainty and resignation that pervades the whole conversation.

When they are not in intense communication, as Goffman (1963) termed it, in "focused interaction", silences complete the gaps in the flow of their continuous exchange. As opposed to silences as displays of surprise, or uncomfortable silences suggesting alienation (cf. Wilkinson–Kitzinger 2006), their silences are comforting. They simply sit next to each other, without engaging in conversation, being in an "open region" which may license a conversation at any time (see Goffman 1963: 134). These pauses are the signs of deep trust and intimacy, which gives space for shared personal thoughts about the present and memories of the past. Besides verbal cues, their silences also function as forms of non-verbal communication to explicitly express their alignment (Goffman 1974, Stokes–Hewitt 1976).

Their implicit alignment is also signalled by their non-verbal communication: the use of laughter and body language. At the end of the story, an interesting scene takes place. When the whole house has been left in perfect order, the dishes have been neatly washed, their daughters have been put to bed and kissed, they retire to their bedroom for the night. When they are both lying in their bed, the wife suddenly gets up and goes to the kitchen as she has forgotten the tap open. This seems to be so funny that both of them start laughing. Despite the dramatic situation, they are able to adopt a jocular attitude, laughing together in the face of death as a sign of complete relief. Their close relationship and love is also signalled and underlined by their body language: "their hands clasped, their heads together".

The imminent end is not named, only implied. Possibilities that might have generated it ("war", "hydrogen or atom bomb", "germ warfare") are enlisted by the wife in the form of questions as if in doubt. In the latter part of the conversation, the inevitable is referred to only by implicature: "Things would **stop** here on Earth"; "that'll **go**"; "It'll take twenty-four hours for it all **to go**"; "Do we deserve **this**?"; "the women on the block talked about **it**"; There's nothing in the paper about **it**"; "**This** is logical"; "Nothing else but **this** could have happened". The presence of the verbs *go* and *stop*, the third person singular neutral personal pronoun *it*, the proximal deictic terms signal that neither the husband nor

7 Emphases are mine, Zs. A.

the wife are in the mental position to explicitly name the unspeakable. They just imply it, but as they both had the same dream, they both share the same "mutual contextual belief", it is clear and obvious for both of them what their conversational partner refers to.

There is only one example in their verbal exchange, when the male protagonist uses the trope "the closing of a book", implying that the end is just a simple and natural consequence of the life people lived in the world. This metaphor is in close relation with the phrase "close the books" meaning 'to decide that a particular situation has ended; to conclude something; to stop considering something as an option',[8] as well as with the idiom "to close the book on something" meaning 1. 'to end something unpleasant that has been continuing for a long time'; and 2. 'to stop working on something because you do not believe that you will achieve your aim'.[9] These meanings, together with the implicature arising from the use of the indefinite article ("closing of **a** book"),[10] lead us to the assumption that what the speaker (the husband) refers to in this context is not something permanent that cannot be undone, it does not suggest a pessimistic ending. On the contrary, it implies that there might be other books to open for other people at other times. And perhaps that is why the final exchange of the couple wishing each other good night is not to be interpreted ironically, flouting the maxim of quality, but literally, on face value: an honest wish for one's spouse at the end of a day.

## Conclusions

In this study, we have pursued a pragma-stylistic analysis of Ray Bradbury's *The Last Night of the World*. Considering the short story as a masterpiece of soft science fiction, we carried out a quantitative and qualitative close analysis of the text by examining the protagonists' verbal manifestations in a threatening crisis situation, reflected in their turn-taking strategies, their interrelation, their unsaid, only implied meanings.

Our findings demonstrate that contrary to the expectations suggested by the literature on language use in crisis situations and elicited by the title of the text, the verbal and non-verbal interaction of the two unnamed characters suggests only slight uncertainties regarding their evaluation of the situation (underpinned by the use of conditional sentences, indirect statements – the man's directive speech act formulated in the form of advice –, the elusive references to the end in the form of the pronoun *it*, the proximal deictic term *this*). In the second part of the story, these uncertainties change into perfect harmony and balance between the

8 https://idioms.thefreedictionary.com/closing+the+books.
9 https://www.macmillandictionary.com/dictionary/british/close-the-book-on-something.
10 My emphasis, Zs. A.

characters, marked by the lack of emotive marks in their verbal use, the presence of the inclusive *we*, the equal number of turns in their conversation, their supportive silences, and one example of a metaphor ("the closing of a book").

The affective bond between the conversational partners cannot even be impaired by "the end of the world". Their love for each other prevents them from spending their last night in a typical crisis situation, panicking, screaming, and shouting in despair, but it embraces them and gives them the opportunity to look back at their lives with resignation and face their end with dignity.

The study deals with a very current topic in 2021: crisis communication, and for that reason it is hoped to be of interest to a wider audience. We have carried out an analysis of a literary work from a linguistic perspective, which can serve as an example to follow and will facilitate similar analyses.

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# Saying 'No' to Immigration Quota: An Analysis of Evaluative Language in Hungarian and Romanian Political Discourse

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**Abstract.** One of the most controversial issues during the 2015 migrant crisis and the subsequent process of reformulating immigration policies by the European Union was that of the mandatory resettlement quota. Hungary and Romania formulated very different positions related to migration, but both were critical regarding the mandatory quota. This study analyses parts of declarations and speeches of two heads of state, Viktor Orbán for Hungary and Klaus Iohannis for Romania, concerning the quota issue, by employing the framework of evaluative language, which focuses on the dialogic, interpersonal aspects of utterances. Beyond the fact of rejecting the quota, Martin and White's (2005) taxonomy brings to the forefront the linguistic means through which the two speakers evaluate the subject (a problem of logistics that needs a pragmatic approach or a matter of cultural and national identity) and establish (dis)alignment as representatives of their countries ("official voices" of Hungary and Romania) with regard to the EU position.

**Keywords:** evaluative language, value position, alignment, European migrant crisis, resettlement quota

## 1. Introduction

The 2015 migrant crisis dramatically and quite unexpectedly placed the issue of immigration on the agenda of European countries, prompting them to state a more or less firm position on this subject and determining the EU itself to revise its migrant and asylum policy in order to reach a consensus among its members. The mandatory resettlement quota has been one source of discontent and determined some countries, Hungary and Romania among them, to vote against it during the meeting of the Justice and Home Affairs Council in September 2015.

This situation offers the possibility to analyse two discourses with different contextual premises, that of Hungarian Prime Minister Viktor Orbán and of Romanian President Klaus Iohannis, in an issue which prompts a similar position: criticism towards the EU's mandatory resettlement quota policy. This study aims to identify specific rhetorical strategies and linguistic markers through which this negative evaluation is formulated considering the diverse situational contexts and the speakers' personal style.

## 2. The mandatory resettlement quota

The idea of a mandatory quota first emerged in May 2015, when it became clear that the countries dealing with the large influx of migrants were unable to handle the in-processing and accommodation of such an amount of people. It was planned that a given number of refugees would be distributed to all countries of the EU, based on the size of their population and their GDP. After a few preliminary discussions, the quota system was adopted during a meeting of the Justice and Home Affairs Council on 22 September 2015 despite the fact that several Eastern European states voted against it.

Although its intended purpose was to release pressure on the states that represented the main gateways for the migrants, the mandatory resettlement quota became a controversial issue that "literally split Europe", as Bulgarian Prime Minister Boyko Borisov stated later, in 2018 (*Reuters* January 2018). Objections were generated by its mandatory aspect which goes against the national sovereignty of Member States and the principles that substantiate the free partnership among European states (Patrick, September 2015). Romania, for example, answered the EU call to solidarity among members, with a voluntary offer to shelter 1,785 migrants, but it was compelled to receive a number of 6,351. Hungary, on the other hand, refused the entire quota mechanism, considering it to be a misguided procedure, not likely to produce the desired results.

The debate around the quota system seemed to subside in September 2020, when the concept was replaced with a so-called "solidarity á la carte", consisting in voluntary participation to the effort and using financial incentives for members to receive refugees (*The Guardian* September 2020).

## 3. Evaluative language

The theoretical antecedents of the study of evaluative language are traceable to Halliday's systemic functional linguistics and Bakhtin's concepts of dialogism and heteroglossia. In his description of language metafunctions, Halliday names

the interpersonal (besides ideational and textual) as one of the three fundamental roles that language plays in our lives. While the ideational helps us make sense of our environment and express our thoughts, through the interpersonal we connect to our communities and interact with our peers. The textual dimension represents the basic function in a text through which meaning and cohesion are created (Halliday–Matthiessen 2014).

In describing the way novels reflect the multifaceted social fabric of society, Bakhtin defines heteroglossia as "distinctive links and interrelationships between utterances" which disperse into "rivulets and droplets" constituting a symphony of voices (Holquist 1981: 263). Their constant interaction results in a dialogue which represents the complexity of our world.

Studies concerning evaluative language have been tracing various lexico-grammatical manifestations of attitude and stance (Bieber–Finnegan 1988, 1989) as well as discursive strategies which convey them (Lemke 1998, DuBois 2007). Analyses on evaluation have been predominantly conducted on media texts (Bednarek 2006, Martin–White 2005), with very few studies focussing on political discourse (Al-Shunnag 2014, Berlin 2020).

Perhaps more than other types of utterances, political discourse specifically reflects a many-faceted, interpersonal function of language since, even in the most banal situations, a high communicative value is attributed to it not only by those it explicitly addresses but by all those who may consider themselves involved in the matter. In politics, it is simply impossible not to communicate.

The prevalence of identity politics in today's society (Fukuyama 2018) entails that wielding language as a political tool has a lot more to do with attitude, emotion, and expression of involvement than with the domain of the ideational. Since its approach to language is one that explores the interpersonal, the study of evaluative language in political discourse can provide valuable insight into the way political leaders manage to adhere to, activate, or, on exceptional occasions, create conceptual frames underlying "communities of values and beliefs" (Martin–White 2005) by addressing their target audience.

According to the premise proposed by Martin and White, any act of verbal communication is dialogic in the sense that it contains the speaker's stance towards prior utterances, alternative viewpoints, and anticipated reactions. In terms of this taxonomy, the two speakers' positioning is analysed along the axes of engagement and attitude viewed as scaled systems within the text displaying "regions of meaning and the proximity of one meaning to another along a cline" (Martin–White 2005: 16). Graduation, the third value, allows the possibility to measure upscaling and downscaling and provides a "mapping" of interconnections among the lexico-grammatical realizations of the two domains on a textual and contextual level.

In the two discourses analysed, both speakers express disagreement and criticism towards the mandatory quota system, which is embedded into very different evaluations of the issue of migration. The strikingly different assessments of the situation by the two speakers are as much influenced by the different degrees of involvement of their countries as by the dissimilar personal style each politician approaches the issue.

### 3.1. Engagement: Monoglossic and heteroglossic discourse

The speaker's intersubjective positioning is assigned to the category of engagement through which s/he engages other viewpoints, including that of the putative addressee, and creates a value position which is aligned with others or not. Alignment with alternative positions and the degree to which the speaker accepts them as valid can be traced in the text by the monoglossic or heteroglossic formulations of propositions.

Monoglossic utterances represent value positions which are acknowledged as factual, recognized, with no need to be engaged with. In such cases, either a totally aligned audience is assumed by the speaker or those holding alternative positions are simply excluded from the discursive community (Martin–White 2005: 157). The monoglossic nature of an utterance is largely influenced by the communicative objectives of the speaker and the nature of the proposition itself. As it is revealed below, the communicative contexts of President Iohannis's press conferences provide a predominantly informative frame for his utterances, which favours a monoglossic formulation.

Heteroglossic utterances acknowledge a diverse communicative backdrop which the speaker invokes or allows in order to construe his/her own stance: s/he may place him/-herself at odds with other viewpoints by disclaiming those assertions, entertain the possibility of their validity, distance him-/herself through simply attributing propositions to a third party, or proclaim his/her complete alignment with them.

In the context of this study, three aspects are indicated under the domain of engagement: linguistic manifestations of the speakers' value position, revealing where the politicians stand in the question of mandatory quotas; the degree of their alignment (agreement or disagreement) with the EU policy on the matter; the expected degree of solidarity of the putative audience, which is indicated by the speakers' attempts to negotiate the endorsement of those listening to them or, on the contrary, they take it for granted as a predetermined condition.

### 3.2. Attitude: Affect, judgment, and appreciation

The speakers' value position is to a great extent indicated by a variety of attitudinal markers dispersed throughout the texts. Attitude is present in the texts through the regions of affect, covering elements that express emotions, judgment, assessing behaviour, and appreciation, pertaining to the value of things and phenomena – as quite often the presence of these elements is not only expressed by explicit, inscribed lexis. A graded analysis must also include implicit, invoked indications of attitude present at an ideational level. In these cases, the speaker's attitude is rendered by the actual meaning of his/her propositions, which invite or provoke the listener to have an attitudinal response. As one of the examples below demonstrates, lexical metaphors, often used by Prime Minister Orbán, may significantly amplify a speaker's and a listener's attitudinal position.

## 4. The corpus of the study

The generic categories of the speeches delivered on various occasions are quite distinct in the case of the two speakers. While President Iohannis spoke about migrants during press conferences, with mainly Romanian journalists present, for Prime Minister Orbán the genre varies according to the situational context.

In the case of the Hungarian politician, fragments from two speeches have been selected for the present study. Chronologically, the first one is held in Strasbourg on 19 May 2015, when the European Council met for an extraordinary session to discuss "the Hungarian question", namely the Government's intention to harden punishment for illegal border crossing, going as far as reintroducing capital punishment (*Euractiv* May 2015). At this time, Hungary was preparing to change the migrant policy, due to which the government initiated a national consultation sending a 12-item questionnaire to all of its citizens over 18. It was also two weeks before this event that the EU proposed the quota scheme (*The Guardian* May 2015).

Further excerpts originate from one of the regular meetings with the Hungarian ambassadors, which took place on 7 September 2015. At this time, the border fence was being built, and many migrants started marching towards the Austrian border without being registered. The Justice and Home Affairs Council, where the decision of the mandatory resettlement quota was adopted, met on 22 September.

The press conferences where President Iohannis tackled the official Romanian position regarding the migrant question occurred mainly in September 2015. Since it is not part of the Schengen zone guaranteeing free movement among EU countries, Romania's implication as an EU member extended only as far as the question of the mandatory quota was concerned, in addition to matters of

national and regional security. The excerpts are part of meetings with the press occasioned by various issues that took place on 7, 10, and 23 September 2015.

## 5. The two protagonists as official "voices" for their countries

As representatives of their countries and as political actors adhering to specific ideologies, the two speakers could not be more different. In the last decade, Viktor Orbán has gained notoriety by his conservative, nationalist, Eurosceptic discourse, which has triggered him as a "brand" in European politics (Waller). After several reported incidents on the national border, Prime Minister Orbán caused indignation in Brussels when he announced and pursued his plan to build a fence, "a technical border lock", at the Southern border of Hungary (with neighbouring Serbia and Croatia). As a leading politician in the region, his anti-migrationist discourse surely influenced the most categorical opposition to the quota system among the EU countries, formulated by the countries of the Visegrád Four.

As opposed to the Hungarian Prime Minister, Klaus Iohannis is generally viewed as a liberal and a pro-European leader (*Euractiv* November 2015). Upon his re-election as president in 2019, a press release from the European People's Party called him a "pillar of stability and responsibility" (EPP November 2019) in the region, a reputation which has been accruing since his surprising entrance on the political stage in 2014. At this time, as a relatively unknown presidential candidate, his promise was a politics of "less show, less noise" (DW 2014), to which his moderate style of speech seems to align.

Both speakers[1] assume and take for granted the position of representing their country's official standpoint. In the case of the Romanian President, some self-reference through the pronoun "I" occurs and alternates with reference to Romania: "We regret, and I regret that this decision […] has been taken through majority vote",[2] which is later followed by "these mandatory quotas were refused by Romania from the very beginning" (September 23).[3] At times, he explicitly states this connection as in: "it was then that I first presented […] Romania's opinion, which I made my own" (September 7).[4] The most often used way to signal his role as the official spokesperson for Romania is his use of the inclusive "we" or "us", as in the analysed excerpts he is addressing Romanian journalists and informing the Romanian public: "the phenomenon is important to us because

1 All English translations of Romanian and Hungarian quotations throughout the article are my own, K. K.

2 *Regretăm, şi eu regret, că această decizie […] s-a luat prin vot majoritar.*

3 *Aceste cote obligatorii au fost refuzate de România din capul locului.*

4 *Atunci am prezentat prima dată […] opinia României, opinia pe care mi-am însuşit-o.*

we are in the European Union. Still, in Romania, there is no pressure in this area" (September 7).[5]

In the case of the Hungarian Prime Minister, the use of "we" is completed by reference to "Hungarians", identifying himself as part of the nation: "Hungarians generally like being straightforward about difficult matters. This is what we are like" (Strasbourg speech).[6] In another instance, Viktor Orbán sets himself as an example of one who represents "Hungarian interests": "I can only recommend my own example to you […] the more you are being attacked, the more trenchantly you should formulate your point of view" (meeting with the ambassadors).[7]

## 6. A general evaluation of the phenomenon of migration: The two perspectives

The migrant crisis of 2015 and the ensuing events represent an important cornerstone in EU policy, as it has forced member countries to bring common decisions, and it has been testing their capacity to cooperate in matters of unprecedented complexity for the organization. The official position of the two countries on the issue of migration is very different, and their attitude towards the question of the mandatory quota constitutes the only similarity in their standpoints.

### 6.1. President Klaus Iohannis

Given the nature of the communicative context itself (press conferences) and the characteristics of the audience (journalists representing national media), much of President Iohannis's discourse on this topic is of an experiential/informational nature. The frame of these speeches is mostly provided by the factual narrative the President conveys in order to explain and inform the public about his own personal role and actions as an official representative of Romania in diplomatic negotiations pertaining to the subject of migration. Since Romania's involvement is an indirect one, as a member of the European Union, the President's role in the scenario of the press conferences is that of mediating between the Union-level events in Brussels and the public at home. These periodically occurring meetings with the press are the scene of a "running translation", if you will, of the events related to the migration crisis and their concrete effects on Romania.

5 *(…) fenomenul e important pentru noi, fiindcă suntem în Uniunea Europeană. Însă în România nu apare o presiune în această zonă.*

6 *A magyarok általában szeretnek egyenesen beszélni a nehéz dolgokról. Ilyenek vagyunk.*

7 *Én csak a saját példámat tudom Önöknek ajánlani, […] minél jobban támadják Önöket, annál erőteljesebben fogalmazzák meg álláspontjukat.*

Due to this general trait, the evaluative dimension of President Iohannis's discourse is mostly neutral and expository, often monoglossic, since he is addressing a compliant audience that takes the information at face value: "I think it is adequate to recount a little the evolution of the discussions about the phenomenon of migration" (September 7),[8] he starts one of the meetings and continues in a similar tone. It can be stated that the President's account has a low-key attitudinal value as it presents no inscribed judgment. Should any reference to attitude occur, it is inserted into the frame of the narrative: "That's when I first presented – and I think I was very clear there – Romania's opinion."[9] The President's positive judgment of his own behaviour is only relevant inasmuch as it seeks to illustrate the quality – and the content – of the official position of the country, conveyed at this point as factual information.

As stated earlier, Romania did not distance itself from accommodating newcomers, and a great part of the discussions on the issue of migration converged around figures. In his declarations, while delivering a prepared speech or answering questions from journalists, the President's assessments of this process are primarily logistical ones, which do not relate to free choice or willingness but much rather to material and objective limitations. In the excerpt below, the use of the conditional or the hypothetical "let's say" are markers of willingness to search for solutions, which invoke high positive appreciation of Romania as being a responsible Union member which, despite its limitations, actively contributes to a satisfactory resolution:

> (1) These places are available in six reception facilities which exist in Romania today. Still, the problem is more complicated than the mere reception. […] it wouldn't be complicated, let's say, turning an old barracks into a reception centre, but Romania doesn't have the capacity to integrate these refugees into society. We, I repeat, have solidarity with other countries, but we have to assess how much we can do, and do as much as is now possible.[10]

In his assessments of the situation, the President maintains a neutral attitude, urging towards moderation, acknowledging the possibility of exaggerated reactions but at the same time distancing himself from them by the use of denial, the attitudinal sanction through the inscribed lexis (adjectives: *xenophobe*, *hysterical*), and the positive judgment of recommended conduct: "We can handle

8 *Cred că este bine să relatez un pic evoluția discuțiilor despre fenomenul migrației.*

9 *Atunci am prezentat prima dată – şi cred că am fost foarte clar acolo – opinia României.*

10 *Aceste locuri sunt disponibile în şase centre de primire, care există în România în ziua de astăzi. Însă problema este mult mai complicată decât simpla primire. […] Nu ar fi foarte complicat, să zicem, să transformăm o veche cazarmă în centru de primire, dar România nu are capacitatea să integreze pe aceşti refugiați în societate. Noi, repet, suntem solidari cu celelalte țări, însă trebuie să vedem cât putem noi să facem, atât să facem, şi mai mult nu putem acum* (September 7).

this situation calmly and responsibly, showing solidarity towards countries with a high number of refugees. It is not the case to react hysterically, and it is by no means the case to reveal our xenophobic side" (September 7).[11]

### 6.2. Prime Minister Viktor Orbán

In the context of the great numbers of undocumented refugees crossing the Hungarian border, Prime Minister Orbán discusses this issue as a phenomenon of illegal border crossing: "Facts speak clearly: there is a huge migratory pressure on Europe. As compared to 2010, the degree of illegal migration has increased three times. In Hungary, the number of illegal border crossings has increased 20, that is, twenty times higher" (Strasbourg speech).[12] The excerpt maintains a seemingly factual, monoglossic formulation; yet, the repetition of the (implied) high number adds a high value graduation, which evokes negative affect (alarm), intended as a distress signal addressed to the – assumedly – unknowing audience and an attempt to gain their solidarity towards his position.

The use of tropes or various rhetorical strategies is often the Prime Minister's tool to win his audience over. In the meeting with Hungarian ambassadors, which is in many ways a diplomatic call to arms, he describes the situation as one in which Hungary is forced to endure actions beyond its control by stating: "They have kicked the door on us."[13] The use of this powerful lexical metaphor in order to suggest an act of aggression (on an ideational level) is consistent with his repeated call for defending the physical borders of Hungary as a concrete pursuance of the supreme national interest: keeping Hungary Hungarian (Strasbourg speech). In addition, it may bear a considerable attitudinal impact in engaging the audience to identify as part of the nation which has been mistreated.

The Prime Minister's discourse is mostly heteroglossic in that he uses various ways of engagement to present the alternative position, be that the one represented by the EU or general liberal doctrine, and then sets his own value position against it. The following excerpt seemingly entertains an alternative point of view as justified only to include a negative assessment: "We have no right to influence or even to state an opinion about other countries' experiments related to their wish to live together with a large community which has a different cultural and religious foundation than those who originally live there" (meeting with ambassadors).[14]

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11 *Putem să tratăm chestiunea cu calm, cu răspundere, cu solidaritate față de țările unde există un număr mare de refugiați. Nu este cazul să reacționăm isteric, cum, sigur, nu este cazul să ne arătăm latura xenofobă.*

12 *A tények beszélnek: óriási migrációs nyomás nehezedik ma Európára. 2010-hez képest Európában háromszorosára nőtt az illegális bevándorlás mértéke. Magyarországon rövid idő alatt 20, azaz húszszorosára emelkedett az illegális határátlépők száma.*

13 *Ránkrúgták az ajtót.*

14 *Nincs jogunk arra, hogy befolyásolni akarjuk, vagy akár csak véleményt akarjunk mondani más*

The inscribed negative appreciation of "experiment" aligns with further, more categorical statements of position: "[W]e keep to Hungary's present ethnical and cultural composition, and we do not wish to admit anybody's right to force us to change that."[15] In this proposition, which clearly illustrates Prime Minister Orbán's general position on migration, the speaker directly rejects any alternatives by the use of disclaim, indexed by a negation. Furthermore, it is an illustration of his method of combining two opposing positions in one proposition (we vs. anybody who should "force us to change").

## 7. Evaluation of the idea of mandatory quota

Criticism and distancing from the European Union's policy to impose mandatory migrant quotas on Member States is the only common ground in the two speakers' position on the issue of migration. The following examples illustrate the two speakers' discourse traits in the more specific context of the mandatory quota policy. Both speakers construe a value position opposing the one represented by the European Union and use the strategies consistent with their own personal style in order to mark distancing from that policy. Besides their distinct styles, which influence the graduation and the attitude manifested in their discourses, situational context represents another relevant factor, mostly in construing the putative audience. The Romanian President addresses journalists at home, and his attitude is consistent with the expository role he assumes in rendering the events and facts to the public. The two examples illustrating the Hungarian Prime Minister's position on the quota, on the other hand, include one speech addressed to an audience that does not share the same value position, while the other takes place on familiar ground, in front of an audience with a high degree of solidarity.

### 7.1. President Klaus Iohannis

As demonstrated above, President Iohannis's general assessment and attitude concerning the issue of migration is a moderate one, as Romania is more or less a third party participant to the subject, with a goal to maintain "a balanced ratio between solidarity and responsibility".[16] The adoption of the mandatory quota policy, nevertheless, "calls into question a mechanism which turns the whole

országoknak arról a kísérletéről, hogy az ott élőktől különböző vallási, kulturális alapokon álló nagy közösséggel kívánnak együtt élni.

15 *[R]agaszkodunk Magyarország jelenlegi etnikai, kulturális összetételéhez, és nem akarjuk elismerni senkinek a jogát, hogy ránk kényszerítse ennek megváltoztatását.*

16 *raport echilibrat între solidaritate şi responsabilitate.*

problem into a very complex one because it raises questions over the operating principles of the European Union" (September 23).[17]

The President makes a series of heteroglossic formulations, which place the two standpoints as oppositional. The following excerpts are parts of meetings with the press, which took place before the quota vote (September 10 – (1) and (2)) and immediately after it (September 23 – (3) and (4)):

> (2) I have acknowledged this project presented in the European Parliament with some dissatisfaction. The fact that, on the part of the Commission, such a – quite bureaucratic – project was worked out and presented, in my opinion, will not lead to a solution.[18]
>
> (3) What we don't consider to be a solution, and we don't find appropriate is to speak of mandatory quotas, calculated in a bureaucratic, accounting style, I could say, without consulting the Member States.[19]
>
> (4) We agreed from the very beginning to receive refugees within the limits of our resources. What has not seemed appropriate, and it still does not seem appropriate, is the mandatory-quota-based calculation, a mathematical one, which allows almost no consideration of the realities of each country.[20]
>
> (5) We regret, and I regret, that this decision, instead of using consensus, negotiation, and discussions, has been taken based on majority vote. I do not believe that imposing mandatory quotas or imposing a majority vote will solve this problem.[21]

On the one hand, the President reiterates the initially formulated position: there is no difference in meaning between (2) and (3); what is more, the explicit, disapproving inscribed lexis of negative judgment ("not appropriate", "bureaucratic", and "accounting style" as semantically similar to "mathematical

17 *Pune in discuție un mecanism care face întreaga problemă foarte complexă, fiindcă se pun în discuție principiile după care lucrează Uniunea Europeană.*

18 *Am luat act cu oarece nemulțumire de acest proiect prezentat în Parlamenul European. Faptul că din partea Comisiei s-a lucrat pe un proiect destul de birocratic care a fost prezentat, după părerea mea nu va duce spre o soluționare.*

19 *Ceea ce nu considerăm că este o soluție şi nu considerăm că este oportun e să vorbim despre cote obligatorii, calculate într-un mod foarte birocratic, contabiliceşte, aş putea spune, fără a consulta statele membre.*

20 *Noi am fost din capul locului de acord să primim refugiați în limita resurselor noastre. Ceea ce nu ni s-a părut oportun şi în continuare nu ni se pare oportun este calculul pe bază de cote obligatorii, calcul matematic care nu ține cont aproape deloc de realitățile din fiecare stat.*

21 *Regretăm, şi eu regret, că această decizie, în loc să fie luată prin consens, în baza unor negocieri şi discuții, s-a luat prin vot majoritar. Eu nu cred că impunerea cotelor obligatorii, impunerea printr-un vot majoritar, rezolvă această problemă.*

calculations") is very similar and is repeated in a few other instances. Another constant trait is the frequent use of negations throughout the texts that explicitly formulates the categorical rejection of the EU's strategy through disclaim.

Nevertheless, there is a graduation from lower value judgment (1) formulated before the decisive vote to the more explicit negative assessment after the decision to impose quotas was taken. The use of "some", "quite", and "in my opinion" in (1) is a hesitant, subdued formulation of disalignment with the EU project, reflecting the President's intention to maintain a neutral stance. These markers disappear from his September 23 declaration, where he contrasts his own value position of "consensus, negotiation, and discussions" with the "imposed majority votes" that represent the criticized alternative of the Union. The verbs "regret", "not believe" (4) additionally invoke negative judgment as opposed to the more neutral "acknowledge" (1).

### 7.2. Prime Minister Viktor Orbán

The different contexts of the two selected speeches highly determine the markers of distancing and the degree of attitudinal values expressed in the Prime Minister's discourse. The speech delivered in the European Parliament is a defence of his position in the migrant question, and more specifically the issue of mandatory quota, addressed to the audience representing the opposed value position, that of the European Commission. Consequently, the speaker places his criticism into a dialogical frame, in which the audience is construed as adverse and its position as opposed to the one he represents: "I came today to you because today you, here in Strasbourg, are speaking about my country."[22] The markers "you" and "my country" designate the two opposed sides, yet the speech continues with a feigned alignment, which is, in fact, mocking and covertly reproving: "I find it commendable that you are setting on your agenda important matters that really preoccupy European people."[23] The statement suggests the opposite, insinuating that the European Parliament does not actually tackle "important" matters.

In a reading which places it into the context of Viktor Orbán's general position on the quota, this statement is a low-key attack through irony to the inability that the European Union has demonstrated – in the Prime Minister's view – in solving this problem. In the different context of addressing Hungarian ambassadors, he notes more overtly: "Instead of saying how we must defend our borders so that we know who we're letting in and how serious the problem is, we are discussing this. We're talking at a slogan level. And about whether it should be mandatory or not."[24]

22 *Azért jöttem ma Önök közé, mert Önök ma itt Strassburgban hazámról, Magyarországról beszélnek.*

23 *Üdvözlendőnek tartom, hogy Önök olyan fontos kérdéseket tűznek napirendre, amelyek valóban foglalkoztatják az európai embereket.*

24 *És ahelyett, hogy arról beszélnénk, hogy meg kell védeni a határokat, hogy tudjuk egyáltalán, hogy kit engedtünk be és mekkora a probléma, erről beszélünk. Jelszavak szintjén beszélünk.*

The most important discursive "gesture" in the Prime Minister's speech in Strasbourg is qualifying the quota policy as madness, which in itself may seem inappropriate for the given context. The following excerpts illustrate the mitigating strategies through which lower force graduation is combined with the strong attitudinal value of the word:

> (6) It is my conviction that what we now know as a proposition of the European Commission, is, in our straightforward language, absurd, close to what we could call madness.[25]

> (7) I'm saying this with due respect, but in my conviction it is madness to allow the asylum seekers into Europe and distribute them according to some artificially established quota.[26]

Formulations like "close to what we could call" preceded by a more neutral "absurd", "saying this with due respect" have the role of adjusting the force of the utterance which openly defies his audience. The repetition of "it is my conviction" places the speaker on a firm but at the same time defensive position assumed in facing a possibly hostile audience. Moreover, the two examples are further illustrations of the above mentioned argumentative style rendered through heteroglossic formulations in Viktor Orbán's discourse.

In the next example, the Prime Minister addresses a friendly audience, whose solidarity is assumed, and it demonstrates another characteristic of Orbán's discourse, the use of tropes, namely lexical metaphor, as a method of provoking attitudinal response:

> (8) The thing is that …we are a flock of sheep. All the 28 of us. And our leaders tell us that the quota is a good thing. That's why, now all 28 must repeat: "the quota is a good thing". And there is one that says: "Stop!" But clearly, the voice of the one with the bell around its neck is more important (…) Still, have we thought this through? Are we certain we have planned this well? Is it certain that the quota system will solve the problem of the thousands streaming in on a daily basis?[27]

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*Meg arról, hogy akkor ez kötelező legyen-e vagy nem.*

25 *Az, amit most javaslatként ismerünk mint Európai Bizottsági javaslatot, az a mi egyenes nyelvünkön szólva abszurd, közel ahhoz, amit őrültségnek nevezhetünk.*

26 *Kellő tisztelettel mondom, de meggyőződésem szerint őrültség az a javaslat, hogy engedjük be a menekülteket Európába és osszuk szét valamilyen mesterségesen meghatározott kvóta alapján.*

27 *A helyzet az..., hogy mi egy nyáj vagyunk. Mind a 28-an. És azt mondták a vezetőink, hogy a kvóta jó dolog. Ezért most mind a 28-nak azt kell mondani, hogy: „a kvóta jó dolog". És van egy, amelyik azt mondja, hogy: Állj! Persze, annak nagyobb szava van, akinek a nyakában van a csengő… „Arra kell menni"… „Rendben van." De biztos, hogy jól átgondoltuk ezt? Biztos,*

Qualifying the countries of the European Union as a flock of sheep suggests not only their submissiveness to a questionable decision but also the fact that they all need to act together, as the speaker himself explains later.[28] This explanation may also function as a lower-key adjustment (similarly to the previous examples) of a possibly offensive trope. Still, its main function is to attract further solidarity through the self-deprecating humour aimed to diffuse the seriousness of the issue and create a more comfortable distance from it by evoking familiarity, even for a moment.

The series of rhetorical questions imposes a more sombre tone and urges the audience to consider the serious consequences of the inadequacy of the quota scheme, an inadequacy suggested by the very use of this enumeration. Yet again, the Prime Minister chooses a heteroglossic formulation that evokes the polarity of the value positions represented by him and the European Union.

## 8. Conclusions

Provided by the situational context of their countries and their personal discursive styles, the speakers construe an oppositional value position to the European Union's quota policy, which is equally explicit but very different in its attitudinal engagement. Generally, the Romanian President maintains a neutral style, which is predominantly expositional, often resorting to monoglossic formulations. When expressing his criticism of the mandatory quota policy, he makes use of inscribed lexis suggesting clear negative judgement of it and provides a heteroglossic perspective by juxtaposing alternative assessments of the two value positions he tackles.

The Hungarian Prime Minister produces a predominantly heteroglossic discourse by sharply contrasting the two opposed value positions (his own and the Union's), making use of various rhetorical strategies and tropes such as irony, rhetorical questions, or lexical metaphors, which provoke high attitudinal response. His diverse range of discursive strategies aims to engage and often antagonize alternative stances, in the present case the EU's position towards migration and the mandatory quota.

*hogy jól kigondoltuk ezt? Biztos, hogy a kvótarendszer megoldja a zöldhatáron ezrével naponta beáramlók problémáját?*

28 *Mert abban igaza van a másik huszonvalahánynak, hogy az a probléma olyan, aminek megoldása érdekében mindannyiunknak érdemes erőfeszítéseket tenni.*

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# Speak Global, Sell Local? Digital Linguistic Landscape of Local Small Businesses in the Social Media

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**Abstract.** This paper focuses on the online presence of languages and linguistic patterns of local small businesses in a bilingual, Hungarian-Romanian ethnic community in Romania. By capturing linguistic diversity and creativity via netnographic research, patterns of linguistic landscape elements in the social media, such as marketing strategy of local small businesses, can be analysed. The findings suggest that despite the need to advertise by using the state language, Romanian, in order to maximize the target audience, the concentration of Hungarian landscape elements is the highest. Businesses construct their linguistic identity by their language choices and practices, aligned with the collective linguistic identity of a bilingual community and the need for a global representation, in order to secure a place in the local market.

**Keywords:** digital linguistic landscape, social media, small business, ethnic minority

## Introduction

It is 2021; the second decade of the new millennium has just passed. We are sitting in front of our laptops in home office, working online, and checking on friends and the news in the online space. However, the immersion into the online world is not solely due to the COVID-19 pandemic. During the last two decades, the digital space has dramatically mutated. In 2021, more than 60% of the world's population is online,[1] and statistics[2] indicate a growing linguistic diversity. The

1 https://www.internetworldstats.com/stats.htm: world Internet usage and population statistics, 2021 year-Q1 estimates.

2 https://www.statista.com/statistics/262946/share-of-the-most-common-languages-on-the-internet/.

digital/virtual space has become the next dimension of communication where linguistic and non-linguistic elements intertwine.

This paper focuses on the online presence of languages and linguistic signs of local small businesses in a bilingual, Hungarian-Romanian ethnic community, Sepsiszentgyörgy (Romanian: Sfântu Gheorghe) in Romania. By capturing linguistic diversity and creativity via online ethnographic research, patterns of linguistic landscape elements, such as marketing strategy of local small businesses, can be analysed in "a translocal, online public sphere with which the local signs are profoundly connected" (Blommaert–Maly 2019: 4). How do businesses shape and redesign the digital linguistic landscape in order to exploit their positioning in the economy? Do they present the potential of creativity inherent in bi- and multilingualism? It can be concluded that the interpretation of the digital landscape has to consider the placement of such local signs in a social and cultural context, with a complex interaction of language(s), society, identity, economy, and power (Shohamy–Gorter 2009, Gorter et al. 2012, Csernicskó–Laihonen 2016). Findings suggest that despite the need for advertising in Romanian in order to reach a large target market, the concentration of Hungarian landscape elements is the highest. Businesses construct their linguistic identity via their language use, aligned with the collective linguistic identity of a bilingual community in order to secure a place in the local market.

The article is structured as follows: after defining digital linguistic landscape (LL) and its connection to the market, the corpus of the research – local small businesses with a bilingual ethnic social background in the online social media – is presented. This is followed by the description of the methodology and data. Then, the findings are presented, and, finally, the suggestions for further research – to extend the boundaries of digital LL studies to the economic field – are discussed.

## Changes in the linguistic landscape. Moving online

Gorter (2018) approaches the topic of LL studies from an interesting point of view, proposing the question about LL: "Does it refer to language only or to additional things which are present around us: images, sounds, buildings, clothes or even people?" (Gorter 2018: 41). The author answers with a definite yes. Although the concept of linguistic landscape has been broadened since the well-known milestone research by Landry and Bourhis (1997), there are still many undiscovered fields regarding the complex relationship between language, place, and people. Linguistic landscape "provides a prism of languages embedded in societies and situated in humanistic, social and political ecology of those who share, form, influence and are influenced by it" (Shohamy–Waksman 2009: 314). The term "linguistic" is now no longer limited to verbal

communication, but landscape studies embrace the complexity of signs, and they include, as interest of investigation, a wide range of phenomena – giving birth to touchscape, smellscape, soundscape, schoolscape (Brown 2012, Scarvaglieri et al. 2013, Biró 2016, Laihonen–Tódor 2017, Laihonen–Szabó 2017, Krompák 2018). Moreover, the need of analysing the linguistic landscape phenomenon in the cyberspace (Ivković–Lotherington 2009, Troyer 2012), that is, the LL of the virtual or digital space (Kelly-Holmes 2019, Biró 2019, 2020), has become increasingly relevant. The offline linguistic landscape we are surrounded by is more and more complemented, or even substituted, by the digital landscape. Online interactions have multiplied, and they take place in a fluid space, such as Facebook's news feed. The web has become "a sociolinguistic machine – fuelled by online language practices and choices and by widespread and commonsense ideologies and beliefs about language" (Kelly-Holmes 2019: 25). Communication online has come a long way, and according to Kelly-Holmes we have already experienced four eras of digital communication. The birth of the Internet was characterized by monolingualism, with a clear dominance of English and with the beginnings of e-commerce. In the second phase, with the stabilization of the non-ASCII-supported alphabets, the presence of multilingualism has become visible, and the mainstreaming of e-commerce was secured. Kelly-Homes describes the next phase as hyperlingualism, with the start of the Web 2.0, which is characterized by greater visibility of "small" languages, and at the same time this period is marked by long tail markets,[3] crowdsourcing,[4] and gift economy.[5] The current and fourth stage is labelled as idiolingualism by the author, characterized by algorithmic mass individualization, artificial intelligence, and the market of one.[6] She also introduces the idea of linguistic filter bubble, "tailoring and personalizing of online language provision", which means that an intensified but isolated hyperlingualism and the gradual erasure of multilingualism is taking place, where users live in linguistic isolation (Kelly-Holmes 2019: 26) and focus on variety in marketing, and thus "companies are diversifying their products to respond to almost every conceivable customer taste" (Gilmore–Pine 2000). Linguistic customization has become possible, and the exposure of multilingualism is minimized. We, as users, have the illusion of an increased choice of languages, but it turns out that this choice is reduced, and

3 Long tail market refers to the strategy of targeting a large number of niche markets. Businesses that are dominated by a huge market leader can shift their focus to multiple niche markets that have less demand. They can realize significant profits by selling low volumes of hard-to-find items to many customers, instead of only selling large volumes of a reduced number of popular items.

4 Crowdsourcing refers to a way of obtaining work, information, or opinions from a large group of people who submit their data via the Internet.

5 Gift economy refers to economic activity where services and goods are offered to other members of the community without the expectation of financial reward.

6 Market of one refers to the response of the market to actual demand.

at the very moment we experience the state of individualized multilingualism or hyperlingualism, as presented by Kelly-Holmes. Our language preferences or geographical locations are already known, we do not have to deal with some selected languages provided by the Internet: "we are being steered through the global, multilingual web in a monolingual bubble; we see only the language it is assumed we want to see based on past linguistic behaviour and choices, and we are cocooned from other languages" (Kelly-Holmes 2019: 34). Linguistic isolation is perfectly manageable in the digital space; we can reach out for any information given in an unknown language and be satisfied with the offered information.

Kelly-Holmes assumes "English is not part of multilingualism; instead, its association is that of neutrality" (Kelly-Holmes 2013: 138). In the digital space of multiple languages, English has a neutral role, "not indexical of any particular country" (Kelly-Holmes 2013: 138). That means that in the social media the use of English may take the role of a mediator language, not necessarily the role of a lingua franca, but functioning as a language which cannot be identified with any language ideology, thus becoming the language of neutrality. This is even more relevant in bilingual communities, where the use of language, offline or in the digital space, is always laden by linguistic ideologies. English is usually regarded as the symbol of globality, being the language of technology and modernity.

From another perspective, according to Jaworski (2015), there is a new register born, the "globalese", which is "not being immediately recognizable as English or any other 'ethnic' languages (…) may be more adequately considered to be instances of a multimodal, spectacularized and commodified register indexing the global, adaptable to any linguistic repertoire" (Jaworski 2015: 226). Moreover, the "commodification of language (…) has created an opportunity for 'small', minority languages and language varieties to gain symbolic and economic value, visibility, and vitality" (Jaworski 2015: 231). Small languages can be considered the local choice, they become symbols of locality. The relationship between economy and linguistic landscape has already been at the centre of interest, and Laihonen highlights the importance of "how the local, state and global are indexed in the commercial linguistic landscape" (Laihonen 2015: 281).

Nevertheless, Laihonen argues that the original Landry and Bourhis (1997) LL research approaches can be criticized for oversimplification (Laihonen 2015: 178); they cover a lot more than simply categorizing and explaining language choices in signs. Regarding commercial signs, the "statistical account fails to examine the signs as images and it implicates a false picture of easily definable languages, whereas in practice it is particularly difficult to classify business names according to a language" (Laihonen 2015: 280). In bilingual or multilingual settings, LL data may clarify the complex interaction of language, society, identity, and power.

## Sociolinguistic context. Small businesses online

In Romania, the only official state language is Romanian, while Hungarians represent the largest ethnic minority living in the country. Sepsiszentgyörgy is the capital city of Covasna County, located in the central part of the country. In the census of 2011, 74% of the city's inhabitants declared themselves to be ethnic Hungarians, 21% Romanians, 0.7% Roma, and 2,562 of other ethnicities,[7] and 74% had Hungarian and 21% Romanian as their first language. The linguistic landscape of the region is mostly bilingual. Furthermore, due to the fact that English signs are more and more present, globalization and the new register, the "globalese" (Jaworski 2015), heavily affects the linguistic landscape of the businesses and the market.

In the digital space, businesses have the opportunity to reach out, interact, and communicate with customers. The growing relevance of Facebook as a platform for online marketing has already been highlighted; social media use is described as a hybrid element of the promotion mix (Mangold–Faulds 2009), a new marketing tool for companies to enhance their brand awareness (Ramsaran-Fowdar–Fowdar 2013). Facebook allows small businesses to be discovered in local circles. The Facebook profile of the business is seen by the customers as the human side of the business which helps engagement with that particular brand. It is an inexpensive marketing possibility, and as such it has huge potentials for small businesses lacking financial resources. As a structured social network, Facebook provides the same features for all companies, no matter their size or financial resources. Businesses have a streamlined way of posting content on their Facebook pages and share a common design. However, they have a unique content, filled with their profile pictures, photos, videos, posts, and links; and the language(s) they use can also represent their business values. Online interactions between customers and businesses make the former feel empowered, and the number of Facebook *likes* can indicate popularity and encourage customer engagement, which means that *liking* is comparable to word of mouth, one of the most important marketing strategies (Swani et al. 2013).

In the case of global, multinational companies, providing multilingual options is a must, although it is an impossible task to satisfy all possible linguistic demands. As Wee points out, "it is simply not possible for any institution to be completely neutral in the sense of not favouring any particular language, and by extension, the speakers of that language" (Wee 2010: 421). National companies or small businesses, however, face a simpler dilemma. They may opt for the state language of the particular country to be heard and understood by all customers of that country. However, in regions with ethnic minorities, this blanket decision might not work as a favourable marketing strategy. On the one hand, customers

7 https://en.wikipedia.org/wiki/Sf%C3%A2ntu_Gheorghe.

can rely on the fact that in this age of hyperlingualism (Kelly-Holmes 2019) they traverse the multilingual Web in a monolingual bubble, and AI will secure the translated information needed by them. On the other hand, online platforms allow the interaction between customer and businesses, and thus require more personalized language choice and use. According to a survey carried out in 2014, more than 75% of global consumers in 10 non-Anglophone countries in Europe, Asia, and South America prefer to buy products in their native language. In addition, 60% rarely or never buy from English-only websites.[8] There is a substantial preference for the customer's mother tongue, and more local-language content leads to a greater likelihood of purchase, which also means that language and language choice have become one of the most significant marketing tools.

In the public offline space, linguistic landscape is usually controlled by the top-down and bottom-up rules of the society, which are based on different ideologies, language policies, and identities. The online social media is profoundly public, still less controlled by top-down rules of the society or the language policies of a particular state. Thus, the online linguistic landscape of small businesses can inform about the current, real-time bottom-up rules of a particular community as we "move from the street to the computer, and we follow the online information displayed in the signs" (Blommaert–Maly 2019: 4). Facebook is a public space, and as such it is a normative space and a field of power. It is relevant to find out whether Hungarian, Romanian, or rather a global language, e.g. English, is used by small businesses, and in what ways and to what end. Therefore, the linguistic landscape of local, small companies can indicate what languages are locally relevant.

## Research framework of online linguistic landscape

Classic LL research was dominated by quantitative approach, where visible languages were counted, and it turned out to be a useful tool to detect the major patterns of LL development. Studying the presence of languages, connected with the particular communities and the relationships between them, requires different approaches; thus, qualitative and ethnographic research has risen. Moreover, the space itself has opened up to new horizons. As Blommaert and Maly point out, "when we follow the leads from locally emplaced signs towards the online sphere they point towards, we begin to see vastly more" (Blommaert–Maly 2019: 4). They argue that the agents and elements of online linguistic landscapes turn out to be "far broader and more diverse than what an exclusively offline LL analysis would show" (Blommaert–Maly 2019: 8). Research frameworks of "linguistic netnography" (Kozinets 2006), also known as "Internet/online ethnography" (Androutsopoulos

8 https://csa-research.com/More/Media/Press-Releases/ArticleID/31/Survey-of-3-000-Online-Shoppers-Across-10-Countries-Finds-that-60-Rarely-or-Never-Buy-from-English-only-Websites.

2006), have become useful tools in LL studies. Blommaert and Maly suggests a detailed approach, named ELLA 2.0, in order to analyse the online ethnography of linguistic landscapes. They focus on superdiversity, which is opposed to "the sedentary diaspora demographics", and "multi-ethnic neighbourhoods become the locale within which social actions by their populations must be confined, or privileged analytically" (Blommaert–Maly 2019: 8). The digital ethnographic research of linguistic landscape analysis (ELLA 2.0) is a qualitative research method that adapts ethnographic research techniques in examining the culture of online communities, emerging through computer-mediated communications, which includes the systematic observation of online activities, the collection and linguistic analysis of screen data, and additional data elicited through contact with users. Methods may include semiotic, visual, or content analysis, participant and non-participant observations, as well as interviews. It also involves screenshot taking, which turns out to be a unique opportunity to study the ongoing change in online media. Comments, new posts, videos, photos may be added, which can also deliver certain new messages or trigger new interpretations. ELLA 2.0 is based on three major elements. First of all, it concerns small details in concrete empirical cases of momentary events in the material world. Second, it approaches these cases "as an interplay between systemic and non-systemic, local and translocal, online and offline features", and thirdly it moves the research focus to "social action in a networked and post-digital society", where the linguistic landscape is "an effect of social life, of collaboration, response or conflict with others offline and online" (Blommaert–Maly 2019: 4).

The present study is based on the Facebook content of 10 local small businesses in Sepsiszentgyörgy. All data included in the analysis were collected during a five-month period, between December 2020 and April 2021, which was considered a suitable length of time to capture details of the linguistic landscape of these businesses. The timing was also relevant due to the fact that it covered two major holiday events, namely Christmas and Easter. These holiday periods request an even more intense interaction with the customers, therefore an increased possibility for linguistic data. The research methodology followed the steps offered by the digital ethnographic research of linguistic landscape analysis (ELLA 2.0), meaning the collection and linguistic analysis of screen data, including content analysis and non-participant observations. It focused on small details in concrete empirical cases, which offered the interpretations for the relationships between local, state, and global references, and it helped to focus on the sociocultural and economic actions of the community. Throughout the analysis, the individual posts of small businesses' Facebook pages were categorized, as well as signs, symbols, or other linguistic landscape elements, based on the language choice or sociocultural references. Five categories of the analysis were defined. Each category represents a distinct aspect of the phenomenon being studied. Finally, the various categories

were interconnected in order to uncover any fundamental underlying trends and patterns for the interpretation. The ethical procedure of GDPR standards was not relevant since these Facebook pages are available to the public.

## Small businesses and their LL

The selection of local small businesses was well-defined: all 10 small businesses are locally established, operating in the city, and fairly well-known by the inhabitants due to the demographic features of a small city as well as to the newspaper articles which promote these small businesses in print and online media from time to time. These businesses are all in the food sector. Five of them are cake shops: *Erika Csoki*, *Flour Power*, *M&M Cake Express*, *Marie's*, and *Orka*. The other five are fast-food small businesses: *Csíra*, *Döner House*, *Eleven Street Food*, *Gado*, and *Salento Pizza*. They are popular small businesses, and due to their services they cover a large segment of the local target market. The units of analysis included the following: name and logo of the small businesses; the content, photos, and symbols posted on their Facebook pages.

## The names of the small businesses

Choosing a name for a company can be challenging in any circumstances. A name cannot be too general or too long, too difficult to understand, hard to spell or pronounce. In the local market, the choice of the language carries further connotations. Out of the ten businesses, only two use Hungarian brand names: *Erika Csoki* [Erika Choco] and *Csíra* [Sprout]. However, the name *Erika Csoki* is a mix of an international female name – being also the name of the owner – and the shortened version of the Hungarian word for chocolate, which, again, has international, global reference. At the same time, it is easy to understand, remember, and pronounce by the locals. According to Laihonen (2015), "even though proper names can be classified according to language, in different contexts they may be assigned to different languages" (Laihonen 2015: 286) because the language choice in name signs connects to the sign producers aligning with the top-bottom rules of the society, but it also reveals the identity these businesses wish to construct. The use of Hungarian in name signs is legal and not avoided in the region; however, English or globalese business names are probably easier to be officially registered than Hungarian ones. Another business name example, *Csíra*, is a Hungarian term for sprout, indicates the vegan style of the fast-food business, and due to its shortness it can be easily remembered by non-Hungarian customers as well. Some businesses have chosen English or global names, i.e.

*Gado* (with a probable reference to Indonesian cuisine) or *Döner House*, which is a mix of the well-known Turkish food name and an English word, thus indexing the global, using globalese. Business owners created fictional names such as *Orka* (using the names of the owners as an anagram). These can be regarded as globalese because, according to Jaworski, they are not immediately recognized as English (Jaworski 2015: 232). Interestingly, the cake shop's name, *Flour Power*, uses a homophone as wordplay, referring to the basic ingredient of the cakes and to the famous flower power movement at the same time – they offer gluten-free products, well-known by people on specific diets. In this local market, where the majority of the customers would never understand this subtle message, English delivers global references, connects the local market with the global one. The global reference in a bilingual community carries a neutral role, as it is not indexical of any particular country or nationality. An interesting comparison, however, is with Laihonen's (2015) findings regarding the LL of Dunaszerdahely. He sums up that "symbolic elements, e.g. business names, are typically global, more functional elements are most often in Slovak" (Laihonen 2015: 290), which is also common in the case of these business names in Sepsiszentgyörgy – they are indexing the global. The use of Hungarian can be interpreted as indexing the local, while the use of Romanian indexes the state. Globalese or English are accepted by the local inhabitants, as their association is that of neutrality.

## The logo of the small businesses

A logo is strongly connected to company identity. Logos help customers recognize the brand; therefore, logos can make or break the business. They usually tell a story about the business and communicate its unique value proposition. The choice of language can emphasize the identity created by the company. None of the logos designed by the small businesses are Hungarian-only. The choice of English or globalese can be explained by the wish to stay neutral and to be connected to global values.


**Figure 1.** *Examples of neutrality*

As the logos in *Figure 1* suggest, these local small businesses have opted for the use of English and globalese. Some companies, for example, *Flour Power* have chosen an English-only name and logo for their businesses, while *Gado* is rather a reference to an Indonesian salad. This reference brings the global cuisine and gourmet closer to the local inhabitant. The third logo appears to be global as well, where the name – *Marie* – could be borrowed from English or French, or even Romanian, while the inscription – *Factory of dreamcakes* – definitely helps to construct a non-specific linguistic repertoire. This is an ongoing trend among small businesses, and a further interpretation could be that it not only connects but also enhances the local values with global ones, presents the products and services in a fashionable manner, attractive for the younger generation, and, finally, avoids getting classified as a company which serves only the members of an ethnic minority. They also display hashtags occasionally, in form of bilingual texts: e.g. #*tastesofourcity* appearing in some of the logos.


**Figure 2.** *Bilingual hashtags accompany the logos*

These hashtags would refer to the local values of the products and services and, nonetheless, target both linguistic communities, Romanian and Hungarian, living in the city. Besides the textual elements, the visual, non-textual signs are designed to carry neutral references. The fonts used in the logos, the stamp-like element of the *Eleven* fast-food business, or the symbols of the cake and baking utensils of the *Flour Power* cake shop leave no room for "nationalized" connotations. There is no "locality" implied, local is not indexed. The logos blend into a pool of global expectations, which might come from the customers, the local inhabitants as well, not just from a broader target market strategy of the businesses.

## The content of posts on the Facebook pages of the small businesses

The choice of language in the posts clearly indicates the relevance of the language(s) used by the majority of the customers. All the posts were analysed, based on the

language they used and on the frequency of the posts. Interestingly, there is a clear difference between the cake shops and the fast-food businesses regarding the use of monolingual or bilingual posts. Cake shops are 90% monolingual, except the *Erika Csoki*, while fast-food businesses are 97% bilingual. The number of posts differs from business to business; the table below presents the added number of posts during the five-month period of survey and the frequency of bilingual or monolingual posts. The cake shop businesses are customer service businesses, meaning that cake shops usually take the orders directly from their local customers. On the other hand, the fast-food businesses serve a larger customer group, whose members often come from other regions. Furthermore, two details are worth mentioning. Fast-food businesses include English words or share photos with English inscriptions in 25–30% of their posts. For example, *Eleven* fills almost 50% of its posts with English texts. Cake shops, however, do not post in English, but their products may be decorated with English texts: i.e. *How did I get so lucky to have you in my life?* or *Happy Valentine's day!* etc. The next detail refers to a single linguistic data, still worth mentioning. The time gap between Western Christianity's and the Orthodox Easter holiday made possible for the businesses to address both holidays and to prepare special treats for the Hungarian and the Romanian customers separately. The *Flour Power* cake shop prepared a Romanian dessert speciality, called *mucenici*, which cannot be translated. The text appeared in Hungarian, using code-switching with a special reference to the Orthodox Easter holiday: *Az idei böjti időszakban sem marad ki kínálatunkból a „mucenici", a tej- és tojásmentes román hagyományos sütemény* [During this Lent season, we will also be serving "mucenici", the traditional dairy- and egg-free Romanian pastry.].

**Table 1.** *Number of posts and frequency of languages in the posts*

| Company/ Posts | Orka | M&M | Marie's | Flour Power | Erika Csoki | Salento | Gado | Döner House | Eleven | Csíra |
|---|---|---|---|---|---|---|---|---|---|---|
| Hungarian-only | 110 | 66 | 43 | 32 | 11 | - | 4 | - | - | - |
| Bilingual posts | - | 7 | 4 | - | 41 | 76 | 45 | 98 | 72 | 121 |
| Romanian-only | 2 | 3 | 2 | 4 | - | 6 | - | - | - | - |
| Total number of posts | 112 | 76 | 51 | 36 | 52 | 82 | 49 | 98 | 72 | 121 |

The texts can be considered as functional texts, and the more functional or informative they are, the more likely they are to be bilingual. These posts, however, cannot be considered official signs; therefore, it is not likely that they display the official state language, Romanian, exclusively (see Laihonen–Csernicskó 2019).

Among these bilingual posts, there are contests and job advertisements shared. The posted contests have a clear marketing purpose, to promote the brand, the products. They need to target as many customers as possible, regardless of the language or nationality. The language choice of job advertisements may vary. Job advertisements posted in Hungarian-only can be explained as targeting Hungarian speakers as potential future employees, while bilingual ones have no prerequisites regarding the nationality of them. As part of the marketing strategies, Easter and Christmas wishes may appear bi- or multilingual. The choice of English may be interpreted as a strategy to create a neutral and global register.


**Figure 3.** *Bilingual posts of job advertisements and Christmas wishes*

The placement of the languages delivers further connotations. The job advertisement in *Figure 3* presents Romanian first and then Hungarian, which indicates the local relevance of these languages, implying the offline language policies the business aligns with. However, other businesses place Hungarian texts first and then the Romanian one. The order of languages displayed suggests that the business or the owner addresses mainly Hungarian customers. The digital space allows such freedom; these bottom-up signs are communicated by the economic actors, not by the state.

## The photos shared on the Facebook pages of the small businesses

The possibility to deliver visual inputs to the customer is significant for these businesses. Visual content enhances the effectiveness of digital marketing by attracting a clearly defined target audience. Businesses share photos, which may

be accompanied by captions and inscriptions. These can be monolingual, bi- or multilingual, and the choice of the language(s) seems to be triggered by certain events, such as Christmas holiday or an advertising contest, which tries to reach out to as many customers as possible.


**Figure 4.** *Multilingual inscriptions*

The global event, Women's Day, enriches the local event with global references; hence the English text in the photo, accompanied by bilingual event descriptions. Individualized multilingualism characterizes the inscriptions used on cakes or pralines with messages. As seen in *Figure 4*, Valentine's Day triggered different inscriptions in this cake shop, *Erika Csoki*. These chocolate pralines become personalized due to their decorative patterns and to the messages written on them. The photo bringing together all the languages displays multilingualism, while customer satisfaction will be achieved with the help of individualized messages in different languages. An explanation for this individualized multilingualism can be sought in the marketing strategy of small businesses, where they deliver personalized products and services as part of the market of one.

## Symbols appearing on the Facebook pages of the small businesses

Symbols mostly appear in photos or product promotions shared on Facebook pages. Moreover, symbols can also be included in the logos themselves, and the emojis, accompanying the shared posts, are symbolic representations as well. The signs with a text in English, especially the logos, are multimodal, including universal symbols or icons indicating the type of businesses, e.g. baking utensils for *Marie's* cake shop, an icon symbolizing the sprout for the *Csíra* vegan fast-

food business, or the cocoa bean icon inserted in the logo of the *Erika Csoki* cake business. These can be interpreted as neutral symbols. The targeted audience is a mixed audience, and again they mostly call for the "globalese", where the local is not indexed, and these "English-only signs can be seen to add to the image as modern or global" (Laihonen–Csernicskó 2019: 157).

**Figure 5.** *The use of Hungarian national colours*

Among the photos shared by the *M&M Cake Express* cake shop before the Christmas season, there is one (*Figure 5*) with little Santas in it, dressed up in colourful clothes featuring the Hungarian national colours, which can be interpreted as the indication of the linguistic and ethnic identity of that particular small business.

## Conclusions

What results from this brief analysis of local small businesses online is that there is in fact an opportunity for small businesses to continuously reconstruct their digital LL in order to position themselves on the local market. As 74% of this local community is Hungarian, these businesses construct their target market based on the local ethnic community. The larger target group, however, includes Romanian customers as well; therefore, bilingual digital linguistic landscape signs index the state or the global. The Internet has secured the greater visibility of the small languages, and algorithm-based translations offer further possibilities to be seen by a larger audience. Linguistic isolation is manageable in the digital space, but in a bilingual community the inner rules of the market affect language choice. The analysis based on the categories of signs suggests how these local

small businesses construct the digital LL and tells us about the bottom-up rules they adhere to, which are mostly justified by the market and its inner practices, and not by the state language policies. The presence of English does not foster multilingualism but rather it refers to a safe territory, to neutrality, accepted by the members of the local community regardless of nationality. English is the neutral way for businesses to position themselves, not the global talk, and it can also target the younger generation. However, the creativity inherent in bi- and multilingualism seems to be the strategic effort of local businesses to reach out for potential customers. The study presented in this paper demands further research. It could directly examine the language choice in comments as well, to study the business–customer interaction online.

Languages and economy in the digital space seem to create their own playground, set their own rules, which are about the market of one, satisfying individual needs and delivering personalized products, rather than about the rules and regulations issued by actors on the top of the power relations in the offline space.

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# In the Footsteps of Graphicons: Tracing Parameters and Pragmatic Strategies in Graphicon Usage

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**Abstract**. The textual intercourse in computer-mediated communication is intertwined with graphicons of various forms, gaining new meanings and functions. They are part of the online culture and, specifically, part of the communicative skills in digital environment. In many cases, graphicons are used not as signs of emotion but rather as indication of the illocutionary force of the textual utterances that they accompany. The current work endeavours to reveal the specific aspect of language use where iconoid objects "take over" and substitute textual utterances. The paper also attempts to trace to what extent pragmatics could be applicable in the analysis of the visual representations (i.e. graphicons) embodied in computer-mediated communication as means of communicative acts. The different graphicon forms and the dynamics in the usage carry additional challenge for the interpretation of the "visual" act. However, it is possible to systematically trace a pattern in the occurrence of the graphicons – their use as a complementary to a written statement, and their use as a single communicative act.

**Keywords:** graphicon, pragmatics in computer-mediated communication, visual speech act

## 1. Research objectives

Undoubtedly, one could agree that in the past one-two decades we have witnessed the emergence and the active implementation in everyday life of a digital channel of communication – the computer-mediated communication (CMC). In a broad sense, computer-mediated communication enacts written or face-to-face (i.e. video) discourse in digital environment, mediated by a device such as a computer, a tablet, or a smartphone. This kind of communication has abruptly become predominant

during the previous months due to the extraordinary social situation in which people from all over the world found themselves as a result of the pandemic outburst in early 2020. For millions of people, computer-mediated communication has been the only channel to associate with friends and relatives and also the main channel for professional communication and education or training. This unprecedented urge for computer-mediated communication would most likely lead to robust linguistic data and to subsequent analyses in that particular field.

The objective of the present study is to turn to a specific realization within the digital language communication – the implementation of *graphicons*[1] in written discourse. It aims at tracing the pragmatic strategies in graphicon usage by also taking into account the chronological development and the variability of graphicon forms. The purpose is twofold: while deploying the graphicons in CMC, it also endeavours to map aspects of their communicative functions (on the pragmatic level) in order to indicate to what extent pragmatics could offer pre-eminent analysis of such visual representations embodied in textual intercourse (as means of communicative acts).

A study on graphicons – simply due to their nature, if nothing else – is inevitably expected to have a multidisciplinary nuance: incorporating linguistic, social, cultural, and IT aspects, among others. Furthermore, the various types and enactment of graphicons bring an additional source of hesitation to the interpretation of such "visual" acts. The current work undertakes the challenge to trace systematic patterns in the occurrence of the graphicons – their use as a complementary to a written statement and as a single communicative act. The following two types have been considered:

(1) *Patterns in graphicon positioning in CMC*

a. The use of a graphicon as a complementary to a written text statement e.g. '*I understand* 🙄'

b. The use of a graphicon as a response, that is, as a single communicative act, e.g.
'*We are in Valletta!*'
'👍'

## 2. The concept of *graphicons*

Under the common name *graphicons* (a *graphical icons* blend), as pointed out in Herring and Dainas (2017), various 'iconoid' images are gathered. They include, though not exhaustively, the following forms:

1 There is certain hesitation as to whether the word is countable or non-countable, as also seen in the variations of its use in linguistic studies. In the present paper, it is treated as a countable noun.

(2) *graphicons*
emoticons
emoji
GIFs (Graphics Interchange Format files)
stickers/images
memes
memoji, etc.

Despite the fact that the above-mentioned visual representations have a relatively short presence in human communication, it is noticeable that they have already demonstrated a rather rapid development, rich in variations (i.e. forms, social platform sets, static/video, etc.). This could be observed when tracing the chronology of graphicons and some characteristic variables that have appeared since their first use, as revealed further below. Before turning to the overall frame of the graphicon presence in CMC, however, it is necessary to mention the motivation behind choosing to review *en gros* the "visual" acts – some enlisted in (2) above – under the common concept of graphicon. The pragmatic paradigm behind the implementation of graphicons is expected to be revealed in a clearer frame when the visual act (i.e. graphicon) is not sub-divided into different types, e.g. pictorial, video, "hashtagized", etc. Instead, by putting the line between textual and icon-like communicative acts, it is assumed that their use as a complementary to a written statement or as a single communicative act where graphicons take over and substitute textual utterances would be more distinguishable and could point at a certain systematic pattern. Graphicons are developing rapidly, virally, and one could expect new forms and shapes to appear practically as we discuss the variants – it seems a challenge to exhaustively trace and describe all the types.

Therefore, the current paper has opted to refer to all icon-like (both static and video) graphic realizations within computer-mediated communication under the common name of *graphicons.*

## 2.1. Chronology and characteristic variations

The first emoticon – :-) – is said to have been created in 1982, in the USA, on a *Carnegie Mellon* University bulletin board (cf. Herring and Dainas 2017). The term "emoticon" is a witty portmanteau of "emotion" and "icon," logically suggesting an image that indicates emotional expression.

Apart from representing an emotional status, such as :-) (depicting a smile/smiling), emoticons can be pictorial as well, e.g. *<\:-) (depicting Santa Claus). No additional software or key sets are necessary to produce emoticons. This fact makes the use of emoticons rather natural and easy. Thus, they opened the door to textual communication for non-text participants and left it wide open.

The followers of the emoticons arrived into CMC in a rather swift manner. The concept of *emoji* takes researchers to Japan – according to various reviews on emoji – and, as indicated in the emoji reference website *Emojipedia* (https://blog.emojipedia.org/correcting-the-record-on-the-first-emoji-set/), it was created in 1997, representing actual pictures such as a panda.[2] The word itself comes from Japanese, bearing the original meaning "picture character" (Li and Yang 2018). In 2009/2010, an emoji set was added to Unicode[3] for the first time. It is worth mentioning this fact because due to this move in particular did the emoji images become standardized and applicable in various language environments in computer-mediated communication (e.g. Japanese, English, Bulgarian, Hungarian, Hebrew, and many more). Thus, the term *emoji* was adopted together with the graphic images (Sugiyama 2015).

Today, it is usual to come across emojis practically everywhere (a rather extreme but perhaps truthful statement). Their "rise" was observed in 2015 when *Oxford Dictionaries* (http://www.oxforddictionaries.com/press/news/2016/9/2/WOTY) chose *emoji* as their traditional "word of the year" for 2015.[4] In doing so, the *Oxford Dictionaries* marked not only the thriving of the emoji but also – in a way – gave it a language status: it was treated as a "word". A rather curious fact is that there is even a "translation" into the emoji version of an English language text: 10,000 sentences from the classical novel *Moby Dick* were "translated" into only emojis, cf. www.EmojiDick.com.

As various social (and media) platforms and smartphone applications started to offer their own sets of emoji based on the Unicode standard, the spread of that type of visual representation received the potential to achieve even larger scales. For example, in a report on the appearance of emojis, Dimson (2015) states that more than 50% of the posts in social platforms contain emojis – a rather impressive result. The author concludes that there is an additional boost in the use of the emojis, which is perhaps due to the fact that users are able to upload and edit pictures/images along with a caption (Dimson 2015).

So, here we not only witness the usage of pre-ready images, but communicators are also given the freedom to create their own compilations and to personalize visual representations. This option enforces the pragmatic mechanisms for the interlocutor, and it should not come as a surprise that the occurrence of this type

2 The exact year (1997 or 1999) and the creator (Docomo or Soft Bank) of the first set of emojis are still disputable. However, the country where emoji began its "life" is certainly Japan (for more details, see: https://blog.emojipedia.org/correcting-the-record-on-the-first-emoji-set/).

3 For more information on Unicode characters for text and emoji, cf.: https://home.unicode.org/.

4 This was motivated by saying that the chosen emoji, "face with tears of joy", was the word that best described the feeling/mood of the year 2015. Furthermore, the "face with tears of joy" was the most commonly used emoji, making up approximately 20% of the emoji usage as logged by SwiftKey in 2015 (for details, cf.: http://www.oxforddictionaries.com/press/news/2016/9/2/WOTY).

of graphicon has grown and led to further development and to viral versions, as the chronological overview comes to reveal in the paragraphs below.

The graphicon forms, referred to as *stickers*, usually represent images larger than graphical emoticons and emojis. The access to *stickers* is via software products – following the same logic as the above discussed emoji implementation. They are predominately designed to complement communication interfaces in social platforms and smartphone applications.[5] In their recent study, Konrad, Herring, and Choi (2020) compare emojis and stickers and see the latter ones as perhaps "next generation" emojis (Konrad–Herring–Choi 2020: 218).

Rather frequent participants in the CMC are *memes*. The word *meme* (based on Ancient Greek *mīmēma* "something that is imitated") is associated with the name of an English evolutionary biologist and writer Richard Dowkins, who used this lexical form in his book *The Selfish Gene* (He 2008). Nowadays, it is used to denote a visual representation in a mini video format (or rarely a photo format). Again, as it is with the previous types of graphicons, sets of various memes are available in different social and messaging platforms. As Lankshear and Knobel (2007: 202) point out, the *meme* is in a way a cultural phenomenon which spreads rapidly through the computer-mediated communication and bears cultural information (such as ideas, puns, etc.) presented individually or as a compilation of text/language "move", image, or some other unit of cultural "carrier".

Albeit the inevitable difference in using the various types of graphicons, their positioning within the CMC proves to remain the same, as enhanced by some research focused on different types, for example, Dresner and Herring (2010) on illocutionary force, Maíz-Arévalo (2015) on face-saving strategies, etc. As mentioned above, due to the high percentage of CMC in the everyday life of people all around the world and the possibility to personalize the graphicons, it is likely to expect "newcomers".[6]

## 3. Observations on graphicon usage; theoretical overview of certain "laws" of intercourse in written communication

Along with the robust usage of graphicons, linguistic studies in that particular field do not represent a long history, and, as it could come handy to say, the history of graphicon usage is now being made (referring to the actual

5 They are offered as thematic sets and are often organized in tabs and personalized collections (see also De Seta 2018).

6 What would be interesting to observe is whether there is an interchangeability of the graphicon types while preserving the pragmatic force in a subsequent, language-data-based research.

language implementation). A certain theoretical background concerning the pragmatic implementation is found in previous studies on computer-mediated communication (cf. 2.1. and also Konrad–Herring–Choi 2020, Maíz-Arévalo 2015, Dresner–Herring 2010, etc.), and it allows for the following bird's eye generalization:

(3) *Graphicon usage "at large":*
   a. graphicon – a divider between clauses;
   b. graphicon – a compensator for the lack of non-verbal cues in written communication;
   c. graphicons are optimal emotional enhancers.

Konrad, Herring, and Choi (2020) even conclude that "[f]rom expressing emotion, they came to indicate the illocutionary force or the intended tone of textual utterances, and now mostly function like punctuation" […] (2020: 218). The main function of emoticons, according to Hård af Segerstad (2002), is to compensate for the lack of non-verbal cues in CMC, as predominately agreed in subsequent research concerning graphicons.

The use of emojis as *punctuation marks*, as mentioned under point (3a) above, is one of the functions of emoji observed by Sugiyama in a study involving Japanese-speaking participants in a series of focus groups (Sugiyama 2015). Furthermore, the orthographic role of emoji is enforced by a dataset consisting of 1.6 million tweets (messages in a social platform) from 13 different countries, where Novak et al. (2015) found that emojis are commonly placed at the end of a tweet.

Despite the existing works on graphicons and their pragmatic functions, there are still limitations in the linguistic studies. Most empirical research focuses on one or two functions of a given type of a graphicon: for example, Darics (2010) observes the politeness strategy of emoji, or Luor et al. (2010) discuss the way different types of emoticons and emojis fulfil pragmatic functions in various communication settings. An attempt to classify the research on the different types of graphicons is found in an article by Tang and Hew (2019). The authors focus on three types – emoticon, emoji, and sticker – and distinguish between three fields of investigation – communication, linguistics, and psychology, also with the aim to "…reduce the terminological confusion in the literature" (Tang–Hew 2019: 2457).

### 3.1. Relativeness of interpretation

As the etymology of the word emoticon (if we look at that particular "pioneer" graphicon) indicates, it is largely connected with the extralinguistic communication markers expressing emotion in non-face-to-face written communication, thus giving indication regarding the interlocutor's facial expression (Walther–D'Addario 2001, on emoticons). In their rather influential research, Dresner and Herring (2010: 523) state that "emoticons do not comprise

new lexical or morphosyntactic constituents of English. Thus, what is required is a theoretical framework that situates emoticons (or rather some of their uses) between the extremes of non-language and language."

The more "iconized" companion of the emoticon, the emoji, brings additional object representations, which actually do not correspond to facial expressions (such as various objects, e.g. guitar, animals, poo; even activities, e.g. running, eating, sleeping, etc.), becoming a more elaborated variant of the pictorial emoticons. Further, the "hashtagized", personalized GIFs, memes, etc. bring the additional involvement of the potential counter-communicators (CMC participants) by counting on, for example, their cultural background (cf. Herring 2004). This brings the research on graphicons into the field of cultural context, quite inevitably.

### *3.1.1. The issue of cross-linguistic and cultural "strings" in graphicon usage*

By original intention, as already mentioned in 2.1. above, memes tend to represent mostly jokes mediated through visual icon-like *image* + *text* or *GIF* + *text* combinations. They spread virally on various platforms, receiving updates and changing along the way, resembling a gene-copying process.[7]

It is interesting to point out that such graphicons may contain diverse (non-) cultural references (such as historical, (pop) cultural, political, ethnical, religious references, along with country- or profession-specific references) and subsequently require certain background of knowledge in order to be apprehended. Thus, a pragmatic "decoding" of the communicative act of such visual representations is expected to be implemented.

Some researchers even stipulate that the adequate *ad hoc* understanding of personalized graphicons (in their research on memes), i.e. decoding the references, could be linked to a certain age group – the so-called *millennials*, who, due to the amount of time spent online and in CMC, carry most this capacity for understanding and (re-)creating memes (Kostadinovska-Stojchevska–Shalevska 2018). This is a rather far-fetched statement, but perhaps it does reflect a certain tendency. Such assumptions are an additional motivation for shaping up a strictly linguistic apparatus for investigating the linguistic impact of graphicons in written discourse.

The actual interpreting of graphicons proves to be highly variable in terms of individual and cultural variations (Miller et al. 2016). For example, the emoticons

7 It is interesting to point at the link between graphicon-type *meme* and *memetics* – an approach which attempts to give some explanation of cultural evolution based on Darwinist evolutionary views. The meme denotes a unit of cultural information: languages, cultural practices/concepts that can be "replicated and transmitted again and again", as He indicates (2008: 71), in two ways – the same content in different forms and the same form with different content (He 2008: 71–72).

originated as sideways representations "J", and they further developed in East Asia as "right way up", e.g. Japanese *kaomoji* (lit. 'face marks') ^_^. The functions of graphicons can have an effect of the interpretation of a message; this has already been indicated in the discussion above. The fact that the interpretation of an utterance in CMC depends on the presence/lack of a graphicon is also a factor. For example, a study on emoji use observes that Japanese teenagers believe that when there is no emoji in the message, then the person is angry at them. Alternatively, a message containing a lot of emojis can be interpreted as too enthusiastic (Sugiyama 2015). In regard to language environment, it is necessary to note that the majority of studies only deal with monolingual CMC, within one language (predominantly English, but also Swedish, French, Japanese, or Chinese) (Tang–Hew 2019), meaning that there is lack of information about how computer-mediated communication differs cross-linguistically. Furthermore, the interaction between graphicon use – frequency, form, sociopragmatic parameters – and text across various languages may reveal interesting data as far as the typology (and universality) of graphicons is concerned. As mentioned above, graphicon studies do tend to demonstrate its multi-disciplinary nature. Furthermore, it seems that the visualization of graphicons in CMC could not be unambiguously interpreted in terms of the "traditional" linguistic entities such as words and phrases (for more opinions on the subject, cf. Herring 2004: 338–376).

## 4. Some directions for "new horizons" of pragmatic strategies in graphicon usage

The freedom to write and be read that people enjoy nowadays has never been greater. And – as an illustration of the potential "charge and power" of CMC – if it could be said metaphorically that Gutenberg allowed everyone to become a reader, then it could also be said that the Internet allowed everyone to become a writer – on the digital communication channels (resulting in robust language data, including spontaneous and non-edited records). Naturally, such freedom generates new types of written forms, some of which are equipped and upgraded with static or video visual acts (for new types of writing, see also McCulloch 2019). A newly emerged linguistic tool, the *computer-mediated discourse analysis* (CMDA), observes such developing linguistic characteristics (Herring 2019).

The appearance and active use in written discourse of the graphicon forms, such as stickers, GIFs, memes, etc., clearly reveals the tendency of "liveness" of the graphicon concept. Such iconic presence in written communication does provoke the linguistic society/research to give it a status as to whether they could be analysed in terms of linguistic theories dealing with language systems. Following the above discussion on interaction between visual communicative

act and the textual implementation (among others, cf. Dresner and Herring 2010, Lankshear and Knobel 2007, Hård af Segerstad 2002, Herring 2019, etc.), some indications for new horizons of language change could be outlined:

(4) *Graphicon generalizations on language change*
   a. Graphicons (all types regardless the specific parameters in form and use) are becoming increasingly conventionalized as textual markers.
   b. Sociopragmatic variables: different user behaviours across cultures; the age factor in relation to the type of graphicon.
   c. Graphicons may become a universal symbolic language.

## 5. Concluding words

Based on designations regarding graphicon usage within the rather dynamic and non-coherent relevant literature (as revealed in the above discussion (cf. 3. and also indicated in Konrad–Herring–Choi 2020, Miller et al. 2016, Tang–Hew 2019, Vishogradska-Meyer 2021, etc.)), it is assumed that it is possible to systematically trace a pattern in the occurrence of the graphicons. Given these parameters of graphicon studies, it is worth putting forward the idea that research objectives should involve the conceptual treatment of visual communicative act (within the frame of pragmatics). Despite that the initial observation is that both communicative functions of the graphicons indicated in (1) demonstrate wide usage, in order to establish the "laws" of intercourse in written communication for the use of graphicons as a complementary to a written statement, and their use as a single communicative act, a wide range of empirical material needs to be examined. Such an ambitious project to compile a database of graphicons needs to consider various (socio-)pragmatic factors, also possibly fluctuating cross-linguistically, which inevitably interact with IT parameters. From that perspective, the current work is a mere incentive for pointing at the parameters and pragmatic strategies in graphicon usage in CMC, thus providing a start-off as part of a larger-scale research.

The linguistic studies dealing with the incorporation of iconoid objects in texts are challenged by the "freshness" of the material and the possibility to face newer and newer graphicon forms. Albeit the agreement that graphicons are not "traditional words" (as they are not made of alphabetical graphemes), they have proven to be features of language in terms of interfering in the linguistic codes.

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# János Péntek–Attila Benő: *A magyar nyelv Romániában (Erdélyben)*

(The Hungarian Language in Romania (Transylvania)), pp. 473
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There is a long history of studies on minority languages and research focusing on various topics from language maintenance to endangerment, from language shift to revitalization, and from education to language policies. However, from the point of view of minority communities and speakers, Cenoz and Gorter (2008: 5) have succinctly summarized the challenges of such studies as follows: "Minority languages have traditionally been the concern of minority language speakers themselves and to a large extent ignored by speakers of majority languages. Minority language speakers feel minority languages as part of their identity." The Hungarian minority language community in Transylvania has 1.25 million speakers according to the 2011 Romanian census, making it one of the largest linguistic minorities in Europe by all definitions. As the reviewed book convincingly establishes, according to several studies, the identity of Hungarian speakers is based on language in the first case, not on Romanian citizenship or own choice. At the same time, the large number of the Hungarian minority or their commitment to the minority language are hardly known internationally. One reason for this in comparison to other middle-sized or large minorities, such as the Basque or Catalan, is the tendency to speak about Hungarians in Romania, where they make only 6% of the total population. A nationwide 6% population would be a significant minority in other countries, but – as the authors argue – it belittles the significance of Hungarians in the region. To counter this, the book title includes Transylvania, where the number of Hungarians grows over 18% of

the population. Transylvania, home to 99% of Hungarians in Romania, constitutes a historical principality, much older than Romania, which has formed the second largest region for Hungarian language and culture since the first millennium.

At first glance, this very comprehensive book titled *The Hungarian Language in Romania (Transylvania)* by János Péntek and Attila Benő fulfils two aims. Firstly, it is part of a series of six volumes based on a standardized sociolinguistic survey of Hungarian language varieties in Hungary's neighbouring countries, which was initiated by Miklós Kontra and originally conducted between 1995 and 1996. As a result of this survey, a series of books were published under the title *A magyar nyelv a Kárpát-medencében a XX. század végén* [The Hungarian Language in the Carpathian Basin at the End of the 20th Century]. The first book in this series was authored by István Csernicskó, *A magyar nyelv Ukrajnában (Kárpátalján)* [The Hungarian Language in Ukraine (Transcarpathia)] (1998), followed by Lajos Göncz's *A magyar nyelv Jugoszláviában* (Vajdaságban) [The Hungarian Language in Yugoslavia (Vojvodina)] (1999). The next book was authored by István Lanstyák, *A magyar nyelv Szlovákiában* [The Hungarian Language in Slovakia] (2000), followed by co-authored volumes by István Szépfalusi, Ottó Vörös, Anikó Beregszászi, and Miklós Kontra, *A magyar nyelv Ausztriában és Szlovéniában* [The Hungarian Language in Austria and Slovenia] (2012), and by Éva Fancsaly, Erika Gúti, Miklós Kontra, Ljubi Mónika Molnár, Beatrix Oszkó, Beáta Siklósi, and Orsolya Szentesi Žagar, *A magyar nyelv Horvátországban* [The Hungarian Language in Croatia] (2016). Secondly, the authors present the linguistic situation in Transylvania in a very broad socio-historical context, including the events of the two decades in the post-communist Romania and their consequences.

This volume is more than a detailed, comprehensive study of the Hungarian language in Transylvania. It is the result of decades of linguistic research. Moreover, it also contains a diachronic perspective, describing the past, present, and future of a linguistic community in a minority situation. It is a book worth reading. The authors, János Péntek and Attila Benő, are well-known and respected experts, and their books and studies constitute the fundamental works on the subject.

The book is divided into eight chapters. One of the strengths of this work lies in the details; each chapter focuses on different aspects of the Hungarian language as a minority language variant. The introduction of the book itself points at a very important detail, namely at the definition and meanings of the term "minority". Regarding Hungarian minority speakers in Transylvania, the term "minority" is not neutral, it carries a negative connotation, meaning "insignificant", "weak", or "powerless". According to the authors (p. 23), minoritization (Williams 2005) as a concept refers to the process by which the structural position of one or another ethnic group or ethnicity is adversely affected by power relations. Therefore, the aim of the book is to describe a range of phenomena and processes of the Hungarian language community and language use in Transylvania in a minoritized

situation. The book points out that Hungarian language use cannot be evaluated in a minority position in the same way as the monolingual, majority Hungarian language used in Hungary; therefore, there is no single linguistic standard.

The first chapter presents a detailed historical description, showing the demographic development of the population of Transylvania up to the 20th century. It presents the linguistic contacts, and the maps illustrate the development of the three linguistic regions in Transylvania: the region with a Hungarian majority, the transitional and the diaspora regions from a Hungarian point of view.

The second chapter discusses the characteristics of the Hungarian language in the 21st century. In this way, a separate chapter is devoted to the last twenty years, which is missing from the other volumes of the series. The evolution of the population, the structure of settlements, the issue of linguistic attitudes and identity, and the causes and factors of assimilation are analysed from a rich variety of perspectives.

The third chapter examines the specific features of the Hungarian language varieties and registers in this region. The authors analyse the situation of specialized languages, the phenomenon of linguistic decline after Trianon, the drift away from the standard language variety, and the changes after the fall of the communist regime.

The fourth chapter deals with language ideology, language policy, and minority policy in Transylvania; it presents the characteristics of Romania's minority policy and identifies the barriers to minority language use. Romania grants minority languages a subordinate status compared to the state language. A very important finding of the authors – who also refer to the studies of Angella Sorbán (2014) – is that bilingualism, contrary to expectations, is neither an advantage nor an added value in economic terms.

The fifth chapter describes the use of language in education, science, culture, religion, and the media and analyses changes and trends based on the experiences of the first two decades of the 21st century.

The last two chapters examine the Hungarian-speaking minority community from the perspective of bilingualism, analysing the concept, definition, types, and varieties of bilingualism in Transylvania. Contact phenomena and code-switching issues are also investigated in these chapters.

The large-scale monographic work concludes with a summary, in which the authors outline the linguistic developments of the Hungarian minority in Transylvania in the last hundred years. In fact, from 1990 onwards, there has been a convergence of Hungarian language varieties, although their core characteristics remained the same. There have been no substantial changes in the legal status of the language use. The language rights are exclusively individual and not collective rights in Romania. János Péntek and Attila Benő undertook an objective description and analysis of the situation; their analysis serves the

Hungarian minority in Transylvania, enabling its members to plan, take action, and develop a realistic vision of the future.

To summarize, the book is profoundly rich in information, thorough in its analysis, and objective in its description. However, beyond these excellent values, it appeals to its readers and engages them into planning and action whether they are members of this ethnic minority or just sensitive readers of these diverse, complex, and highly significant linguistic phenomena and issues.

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# Attila Imre: *An Introduction to Translator Studies*

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The very title of the book, *An Introduction to Translator Studies*, points to the fact that the author's focus is on the translator as one of the key agents in the translation process. *Translator studies* is a fairly new direction in translation research, identified by Chesterman (2009), who introduced the term to refer to investigations focusing "primarily and explicitly on the agents involved in translation, for instance on their activities or attitudes, their interaction with their social and technical environment, or their history and influence" (2009: 20). For Attila Imre, this approach materializes into a description of many relevant aspects of the translator's job, in an attempt to provide guidance for the main target readers, i.e. the "novice" or "would-be" translators, "who are interested in the translator's common and ever-growing challenges" (p. 11).

The author discusses at length both theoretical and, most importantly, practical issues which shape the translator's training and career from the relationship between translation and communication or translation and language to tips on how to interact with clients or how to start one's business as a freelance translator. He draws attention to the fact that, although translation is "an ancient field of activity" (p. 15), his aim is to "put the translator in the limelight of the 21st century" (p. 56), which means looking at traditional linguistic and cultural competences in the light of globalization and of the development of technology (CAT tools, machine translation, etc.), which have engendered new types of texts and new ways of translating, changing irreversibly the global translation market in terms of expectations and interactions. It should be mentioned that the topics are discussed in the context of the global translation market in general and/or at the level of the European Union and its various members, with an emphasis on Romania and Hungary.

The volume consists of five main chapters, divided into sections and subsections, guiding the reader through a wealth of information. In chapter one ("The Importance of Translation"), the author states plainly that he will investigate translation as "a *product* and a *service*" (p. 17) and the translator as "first and foremost a service provider" (p. 18). Special attention is paid to the relationship between translation on the one hand and language, communication, and culture on the other hand in the 21st century, considering "the impact of the development and present state of information technology (IT), globalization, internationalization, localization and translation (GILT), resulting in particular challenges for both translators and translations" (p. 16). These challenges pertaining to technology, business, and ethics are presented in detail throughout the entire volume. The first chapter deals with a number of definitions and theories of translation, reflecting a myriad of focal points, which underline the complexity of the term and of the field it stands for. Among the multitude of aspects it addresses, there are: the relationship between the original and its translation, the translator's status, the idea of perfect translation, the translation of literary texts versus the translation of non-literary texts. It discusses translation in connection with traditional concepts, such as equivalence, domestication, foreignization, but also with newer ones, such as task, activity, service, project, which pertain to translation management. The last part of this chapter is dedicated to the (sometimes turbulent) relationship between translation and technology, stating that computers (and the Internet) have revolutionized the field through the emergence of CAT tools, translation memories, term bases, and (neural) machine translation, giving rise to the phenomena abbreviated as GILT, a blessing and a curse for the translator.

The pragmatic approach of the volume becomes more visible in the second chapter ("Translator Management"), which starts by clarifying the notion of translator: defining the translator in the present-day context, identifying the various types of translators (professional versus amateur translators, full-time versus part-time versus occasional translators, in-house versus freelance translators), describing the translator's marketplace, and attempting to provide a quantitative analysis of the translation industry – which proves to be a difficult task in the absence of reliable statistics. The author also emphasizes the competences that a 21st-century translator needs: linguistic, cultural, domain-specific, translation, research, and technical competence, the last two having changed considerably in the age of computers and the Internet; for example, research competence used to refer to searching for information in a limited amount of resources, while today it means coping with a tidal wave of information coming from an increasing number of sources. Also, technical competence now refers to being proficient in using IT tools and systems – "translators already know that computer literacy is a must" (p. 79) – and keeping up to date with the latest developments in the

relevant technology. In addition to competences, the translator's profile includes certain character traits such as the willingness for lifelong learning, the ability to work under pressure or in isolation, loyalty, or humility towards the text.

Having sketched the translator's profile, the author brings forth the concept of self-management applied to freelance translators, considering that "a good start-up would have to deal with the multitude of roles a one-person-translation agency is faced with" (p. 92). The discussion on self-management centres on some of the main aspects of project management such as visibility (self-advertising), time, and money. Thus, self-advertising can be achieved through various instruments such the CV, the business card, the website, and through networking, joining professional associations. Time management is concerned with the role played by prioritizing, assessing the translator's availability correctly, setting realistic deadlines and complying with them, while in managing finances a freelance translator should always take into account the workload, the speed, the standard rates, as well as surcharges and discounts, the taxes owed, and, at the same time, keep an eye out for possible financial threats, e.g. disloyal competition, lack of clients.

Chapter three ("Managing Cont(r)acts") enlarges on the relationship between translators, especially freelance translators, and clients, describing the stages in building such a relationship: initiating the communication with the potential clients via the available means (email, phone, social media) and/or using advertising techniques (e.g. cold contacting); negotiating and signing contracts with the future clients; maintaining the relationship with the clients. The author believes that "negotiating with the client is the extension of self-management skills of the translator" (p. 137), who must pay close attention to all the contract clauses (e.g. confidentiality, content, technical issues, payment and deadlines, conflict resolution). Once the contract is signed, the translators must strive to keep the clients "happy" on a very competitive market, by constantly producing high-quality work, paying attention to clients' needs, showing flexibility, preserving their credibility, etc.

In chapter four ("Translator Status"), the author is preoccupied with identifying the factors that influence (or even determine) the low status of translators such as the high number of practitioners, the invisibility of the profession, the market disorder, or the decreasing pay rates. To counterbalance this view, the chapter also presents factors that can contribute to raising the status of the profession. It is interesting to note that, although the role of higher education for translators is discussed in this second category, the author brings forth a number of very sceptical opinions about the potential of most university programmes to adequately prepare translators for the current job market, adding that "no qualifications are needed to become a (general) translator" (p. 165). This chapter also tries to clarify the terminology used to refer to translators recognized by the state, who may be called *authorized*, *sworn*, or *certified*, terms which provide

little information about the translators' educational background or domain of specialization. To support this clarification, the author provides in five appendices at the end of the book the texts used by translators and notaries public (where applicable) to signal a certified translation in English, Romanian, and Hungarian.

The final chapter of the book ("Translators and Ethics") provides an overview of the existing codes of ethics adopted by various translator associations, regulating the relationship between translators on the one hand and the text, the client, or the other professionals in the field (proofreaders, experts, etc.) on the other. Codes of ethics also try to define the translators' ethical conduct, advising them to strive for the best-quality translation, to refuse projects in areas where they are not competent enough or for which the deadline is too tight, to show loyalty to the client, or to be fair in setting the translation rates. When discussing the validity and impact of these documents, the author admits they are limited by the fact that joining an association is voluntary or that many translators operate outside the business (for example, occasional translators). In fact, this state of affairs prompts us to agree with Baker (2011: 274), who claimed that "we need to develop critical skills that can enable translators and interpreters to make ethical decisions for themselves, rather than have to fall back uncritically on abstract codes drawn up by their employers or the associations that represent them".

This brief outline of the main chapters shows that, although the book focuses on the translator, the translator's perspective is not the only one that the author embraces: there are various actors in the translation business that need to be considered – the client, the market conditions, the education institutions, the translator associations –, all of which represent different vantage points that are used to underline the many facets of the translator's job.

In addition, the chapters are accompanied by sets of diverse tasks which attempt to raise awareness of the various issues discussed therein. The readers are asked, among other things, to argue for or against certain ideas: for instance, literary translation is more difficult than specialized translation (p. 59), a non-paying client should be blacklisted and the news circulated on specialized forums (p. 148), translators should split the gains if they rely on highly skilled experts (p. 192); to compile lists of materials or documents, e.g. "collect ten proverbs in your native language" (p. 58), "create a portfolio with the necessary exam requirements and samples to obtain the authorisation in Romania" (p. 173); to assess their own skills or equipment, e.g. "describe your computer/laptop, in a similar way to major websites selling these products" (p. 124), can you manage money/time efficiently? (p. 124), are you a good negotiator? (p. 148); to design a business card or a logo (p. 124); to draft a CV (p. 124) or a translation contract (p. 148). The activities are clearly targeted at the translation student or novice and are meant to check their comprehension of the content but also to stimulate them to think of translation projects as real-life situations.

The volume includes a vast list of references in which both well-established authors and newer resources are present. A large portion of this section is dedicated to online sources, most of which were introduced in the 203 footnotes in the text. This is indicative of the fact that the book can be seen as more than a literature review in the classical sense; it is also an exploration of the relevant information available on the websites of companies, research institutes, translators' associations, the institutions of the European Union, which is synthesised in the sections of each chapter.

As stated by the author, the target readers are novice translators or, we might add, translator students. However, in our opinion, the book is also aimed indirectly at teachers, especially those involved in training future translators, a claim supported by the very attitude of the author (a teacher himself), who offers advice on empirical issues and affords readers the opportunity to check their understanding of the text through the proposed tasks, a rather pedagogical approach. Both categories of readers can interpret the material in a positive as well as in a negative key. From the point of view of a prospective translator, this volume has the advantage of supplying abundant information on the practical aspects of getting started or operating as a freelance translator, which are usually less explored in the literature. It formulates guidelines for future translation professionals based on the current state of the business, from drafting a CV or a business card to approaching clients, from negotiating a contract to saving one's work and performing regular backups – no aspect of the job seems to be considered too unimportant by the author.

Nevertheless, at the same time, prospective translators might be overwhelmed by this large amount of information or become discouraged by the complexity of the business or by the pessimistic outlook that the author brings into discussion from time to time. Faced with the cold reality that, "as neither education nor training is officially required (although recommended), the market remains rather self-regulated and translators are associated with uncertain professional skills, a situation explaining a good part of low professional status" (p. 171) or that "the 'new' translator must be a jack-of-all-trades" (p. 171) (which begs the question "master of none?"), some translator trainees might change their minds about pursuing a career in this field. On the other hand, those who continue on this path will do so fully aware of the difficulties ahead, knowing what they might expect in terms of working conditions or professional status.

For teachers (especially those involved in training future translators in Romania), this volume confirms the realization that sometimes there is little they can do to help future translators in the framework of translation programmes (most of which) targeted at philology students in Romania, which is in line with the author's opinion that "university BA and MA level specializations may not necessarily endow would-be translators with competence characteristic of

professionals" (p. 190). This could be partially explained by the students' low motivation in acquiring solely through theory values and principles like honesty, loyalty, or confidentiality, which are essential in the translator's job. Whereas exposure to real translation situations and/or real-life translators might work better than a hypothetical classroom context, this alternative is not always easy to implement in the curriculum. Moreover, students often fail to apply the appropriate work ethics to their school assignments. Thus, "omitting the deadline is very unprofessional" (p. 187), and the same is true for submitting a translation which was not proofread or which the student obviously failed to check, at least at the basic level of spelling and grammar, a situation which still occurs in translation classes, showing that at times students are not at all aware of the work they are performing.

Also, the author validates the idea held by many teachers that preparing students for the translation field entails more than linguistic guidance or familiarizing them with the theory of translation: "experts know that language skills are simply not enough to become an expert in translation or interpretation" (p. 160) – it involves preparing them for a complex job which they may decide to approach on their own as freelance translators; hence "the education program should encapsulate management of time, money and clients" (p. 162) besides the relevant technology. However, the truth is that most schools in Romania are hardly equipped to mimic, for example, the time constraints under which translators regularly operate – there is little room for negotiating deadlines between teachers and students – or to keep up with the technological updates or to offer a hands-on approach to dimensions such as payment, job management, or client interactions. In fact, it would be very difficult for teachers or students to survey the business due to – as the author himself points out – the lack of reliable or up-to-date information in many areas of the translation industry (e.g. the number of freelance translators or of professional translators, the pricing) and the constant fluctuations that affect the field temporally and geographically (e.g. the most widespread language combinations, the technology used, the workload, the volume of clients). In this context, it is easier to understand why most university study programmes aimed at translator training have not fully embraced *translator studies* and why, contrary to Chesterman's (2009: 15) observation, texts continue to be primary, while the translators themselves are secondary.

In conclusion, in this volume, Attila Imre proves to be a keen observer of translation as a profession, paying close attention to its evolution in the 21st century, when "there are more and more over-educated people, who – partially due to almost regular economic crises – try to prove their talents in the field of translation" (p. 170). In the light of the many challenges facing them, translators "might become either highly successful or reluctant to adapt to the technological challenges and shrinking wages, leaving space for newcomers

and non-professionals alike" (p. 15), leading to a "less and less regulated market and industry" (p. 189). However, above all, we believe that *An Introduction to Translator Studies* testifies to the author's interest in and preoccupation with training prospective translators, his endeavour to answer their questions about the profession. It is true that, at times, the outlook is rather dark, the obstacles described seem almost insurmountable, and the career too taxing or not rewarding enough, but this does not stop the author from offering guidance to would-be translators, relying on his experience as a teacher and a translator. The book – the latest in a series – reflects, beyond any doubt, the author's fascination for this complex and demanding profession and his unwavering efforts to better understand it and to adequately describe it.

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