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Contents

LINGUISTICS

Application of hermeneutics and transcendental pragmatics in linguistics

OKSANA KANERVA

Abstract

The paper proposes a brief overview of tendencies in pragmatics (evolution of sign perception as a dyadic::triadic::quadratic entity; its interpretation not as a static, but dynamic, discourse bound phenomenon, analysis of Peirce's views on sources of rational explanation), paying major attention to Apel's distinctive philosophical approach, known as transcendental pragmatics, its congeniality with general principles of hermeneutics and potentials of its application in linguistics.

Keywords

hermeneutics, pragmatics, sign, simulacra, transcendental grammar

Zastosowanie hermeneutyki i transcendentalnej pragmatyki w językoznawstwie

Abstrakt

Artykuł proponuje krótki przegląd tendencji w pragmatyce (ewolucja postrzegania znaków jako bytu podwójnego :: potrójnego :: poczwórnego; jego interpretacja nie jest zjawiskiem statycznym, ale dyna-

micznym, dyskursywnym; analiza poglądów Peirce'a na źródła racjonalnego wyjaśnienia), zwracając szczególną uwagę na wyróżniające się podejście filozoficzne Apela, znane jako pragmatyka transcendentalna, jego zgodność z ogólnymi zasadami hermeneutyki oraz potencjał jego zastosowania w językoznawstwie.

Słowa kluczowe

hermeneutyka, pragmatyka, znak, simulakry, transcendentalna gramatyka

1.   Introduction

A number of scholars argue that certain branches of linguistics are hermeneutical by their nature. Rennie (2012: 385), for instance, claims that in qualitative linguistic research and discourse studies, the method of hermeneutic circle is implicitly applied to educe and articulate meaning of the text. Furthermore, Sanders (2005: 57) names a number of areas of qualitative linguistics he considers to be hermeneutical by the methodology of use, e.g.

> applied linguistics and sociolinguistics, argumentation studies, conversation analysis, discourse analysis, discursive psychology, ethnography of communication, language pragmatics, rhetorical communication and semiotics.

In this paper, I will demonstrate that hermeneutics and transcendental pragmatics are not only applied in certain fields of linguistics, but provide access to understanding the grammatical structure of language in general, being constituent parts of contemporary linguistic analysis.

2.   Language as a societally created semiotic system

Viewing language as a product of society lies at the core of interpretation of any linguistic phenomenon. Hjelmslev (1969: 3)

insists that

> language is the instrument with which man forms thought and feeling, mood, aspiration, will and act, the instrument by whose-means he influences and is influenced, the ultimate and deepest foundation of human society.

Being a social phenomenon, language differs from other social institutions as it is a system of communication and, in particular, a system of signs. It constitutes itself as the central part of "a science that studies the life of signs within society" (Saussure 1966: 16), i.e. "semiology" in Saussure's terms.

This view is shared by many scholars. As stated by Panther and Thornburg (2009: 3),

> human languages are semiotic systems in which forms are conventionally paired with meanings [...] The semiotic character of language holds not only for individual lexemes but also for grammatical constructions, which code more or less abstract (schematic) contents and communicative functions.

Language, however, should not be confused with speech. Saussure's differentiation of these two notions lies in the very definition of speech as an individual act of will and mind. Within this act it is important to distinguish between: "(1) the combinations by which the speaker uses the language code for expressing his own thought; and (2) the psychophysical mechanism that allows him to exteriorize those combinations" (Saussure 1966: 14).

It brings us to the problem of the difference between two distinct modes experiencing language. Language is a semiotic system, legacy of the many, which functions on the basis of grammatical rules, shared and recognized by everyone. Speech, in turn, is individual, subjective and flexible, it is the way language is used.

3. Interpretation of grammar and individual use of language

Grammar itself can be compared to a game. They are both represented by a set of rules. A game is "a transformation system of essentially the same structure as a semiotic" (Hjelmslev 1969: 110), with the exception that the rules of a game are syncretic by their structure, i.e. their meaning and form coincide and consequently do not require interpretation. On the contrary, linguistic signs which constitute any language demonstrate a dichotomy between the expression-form and the content-form. The meaning which defines them needs to be construed via interpretation. Grammar, as a set of rules, cannot be perceived. This very fact limits our capacity to interpret it.

Similar views were expressed by Schleiermacher (1998), who distinguished between a "grammatical" treating of a language as a semiotic system functioning on the basis of rules, i.e. grammar, and technical interpretation dealing with speech produced by an individual, i.e. use of language. Ricoeur (1981: 47) considers grammatical interpretation to be "objective", and technical or psychological interpretation to be "positive", "because it reaches the act of thought, which produced the discourse". Therefore, psychological interpretation can be achieved by means of empathy, given the empirical accessibility of speech. Language as a socially construed semiotic system lies outside of subjective experience and, consequently, cannot be analyzed through empathy only. Grammar, as a set of rules, governs the way linguistic signs function within a semiotic system called language. The starting point of understanding grammar lies in understanding linguistic signs.

4. Static vs. dynamic modes of sign perception

Primarily linguistic signs were interpreted as static entities. Saussure offered a dyadic sign model, accentuating a non-motivated nature of a linguistic sign, which consists of "a con-

cept and a sound image" (Saussure 1966: 66). This model was later substituted by theories about the triadic structure of linguistic signs.

The problem is that languages differ from genuine convention based sign-systems, in which the structure "meaning=form" is isomorphic.

According to Peirce (1994 [1932]: 2.228), "A sign, or representamen, is something which stands to somebody for something in some respect or capacity". Peirce introduces a triadic structure of a linguistic sign, which consist of three interconnected parts: an object, a representamen and an interpretant. Thus, the process of signification, i.e. semiosis, is not merely constituted by a dyadic relationship between a sign and an object it stands for. The essence of semiosis lies in correspondence between an object and its mental representation.

Following Peirce's ideas, Morris proposes four elements of semiosis: sign vehicle, designatum, and interpretant and interpreter. "The mediators are sign vehicles; the taking-account-of are interpretants; the agents of the process are interpreters; what is taken-account-of are designate" (Morris 1971: 19).

5. Discourse and culturally bound interpretation of linguistic signs

Except for being dynamic entities, linguistic signs should be interpreted inseparably from the discourse. It is widely accepted by cognitive linguists that "meanings of the parts of a construction contribute to the meaning of the whole, but the meaning of the whole is often unpredictable, but holistic and idiomatic" (Panther and Thornburg 2009: 3). Sentences are used as a totality in order to express a complete thought (Rossi-Landi 1983: 129).

Taken separately from the system, signs are interpreted on the basis of their connection with the signified or their influence on the interpreter. It is more worthwhile, however, taking into consideration their connections with other signs depend-

ing on the dynamics of semiotic system in which they function. Signs gain additional qualities determined by their place and value within this system.

The central standpoint of Phenomenological Hermeneutics (Gadamer, Heidegger, Husserl) is that human reality is construed by meanings, which are ways of making sense of reality. Meanings form intersubjective culturally and socially constituted systems. According to Heidegger, description is always already interpretation. Every form of human awareness is interpretive and language serves as a means of reaching understanding (Heidegger 1996).

For Husserl (1967), the central idea behind "intersubjectivity" stipulates that the meaning of any phenomenon is built on the basis of personal or subjective experience of several subjects. Empathy gives access to representations of objects formed in the consciousness of other people. This psychological process involves perceiving another person's experience with one's own mind. Correspondingly, the meaning can be construed only if intersubjective representations coincide. If these representations coincide, they exist independently from single person's consciousness. If they exist beyond empirical perception of one subject, they belong to the world of objective phenomena.

Gadamer, in turn, claims that understanding does not come from perceiving subjective experience of another person, but "language is the universal medium in which understanding occurs. Understanding occurs in interpreting" (Gadamer 2004: 390). The process of transforming concepts and intentions into an abstract language of signs causes alienation between a sign and its meaning. This alienation can be overcome only in interpretation. Understanding lies at the core of interpretation. Subsequently, the hermeneutical task lies in "coming to a proper understanding about the subject matter, which takes place in the medium of language" (Gadamer 2004: 387). The meaning of a linguistic sign is construed as a result of reaching an agreement about similarities between intersubjective

representations of one and the same phenomenon existing in the mind of others.

Arguing against purely structural interpretation of linguistic signs, Ricoeur defined the hermeneutic task in construing meaning through culturally bound discourse. Interpretation of any text should be situated outside the immanence of language. In his own words, the claim is illustrated as follows:

> There is no reference problem in language: signs refer to other signs within the same system. In the phenomenon of the sentence, language passes outside itself; reference is the mark of the self-transcendence of language (Ricoeur 1979: 74).

Smith (1997: 17)sums up the above-said in the way that in contemporary discourse, interpretation is the only way to gain knowledge, it is the main means of demonstrating the impossibility of a culturally transcendent discourse.

The process of accessing language starts with understanding that it is a semiotic system constituted by linguistic signs, the meaning of which is dynamic and culturally bound. Language itself has evolved in society and for it to be able to perform its primary function, i.e. to communicate thoughts and intentions from one subject to another, the meanings have to be conventional and recognizes by others. Signs, however, interact with other signs and change over time. They also depend on context, which provides them with additional shades of meaning. As a result, for the meaning to be retrieved we need to rely on empathy. Itkonen (2004) characterizes empathy as a method of reaching rational explanation, which is based on iconicity. Iconicity, respectively, is understood as similarity, a "picture-like" relationship between extra-linguistic reality and language (Itkonen 2004: 21). For him, conventionalized empathy is intuition (Itkonen 2008). It is the fundamental point of understanding any linguistic activity. Access to meaning is provided by "the native speaker's linguistic intuition" (Itkonen 1978: 56). Speakers elicit the meaning of linguistic signs relying on their own intuition. Although the process of

understanding largely depends on individual consciousness of people, interpretation happens only in comparison of intersubjective representations of objects. For Bergson (1912), intellectual effort is a prerequisite of interpretation. With its help, one can unveil the meaning which lies at the core of iconic sign transformations. Intellectual effort is based on intuition, the latter can be characterized as "the kind of intellectual sympathy by which one places oneself within an object in order to coincide with what is unique in itself and consequently inexpressible" (Bergson 1912: 7). Bergson (1920: 196-199) introduces a notion of a "dynamic scheme", which means an abstract idea containing all the images, in the estate of reciprocal implications with the proper function they perform as a whole. Unfortunately, linguistic signs being inherently dynamic remain a thing-in-itself. In a certain sense, their meaning being fluid and changeable is impossible to capture. Proper understanding is possible only as tracing iconic sign transformations from perception to interpretation (Peirce 1994 [1932]: 2.141-142). Such intellectual empathy or intuition mediates perception and reasoning in order to gain objective knowledge about linguistic phenomena.

Eco (2000: 13-14) expresses an idea that we produce signs in order to articulate meaning. The dynamic nature of linguistic signs, however, turns semiosis into an endless process of interpretation. The concept of "unlimited semiosis" enables the semiotic system to recheck itself entirely using its own means (Eco 1979: 68). This term refers to interpretation as a sequence of interpretants, when the signified is functioning as a signifier for a further signified, and is endlessly reproduced.

6. Problem of infinite sign transformation and formation of simulacra

Contrary to the structural approach (Saussure), to the interpretation of a linguistic sign as immanent and autonomous to extralinguistic reality, the post-structural approach (Baudrillard, Deleuze, Guattari, Derrida) further developed the per-

ception of a linguistic sign as an ontologically, pragmatically and semiotically determined phenomenon, which is defined by the object of its representation, subject and method.

The attempts to reconsider the nonlinear mode of thinking and the dynamic character of signs have brought to light the problem of transformation of signs into simulacra (Baudrillard 1994), rhizomaticity of their meaning (Deleuze-Guattari 2005) and impossibility of their analysis without deconstruction (Derrida 2001).

Bloomfield (1933: 74-75) depicts the problematic nature of contemporary linguistic discourse in the following statement: "Our knowledge of the world in which we live is so imperfect that we can rarely make accurate statements about the meaning of a speech-form".

Unfortunately, neither intersubjectivity nor unlimited semiosis are capable of grasping the meaning of a linguistic signs which has undergone numerous transformations and is on the way of becoming a simulacrum.

According to Marcuse (2002: 17), in contemporary society mass behaviorism causes "habit of thoughts". Such state of affairs produces a one-dimensional man, who mainly mechanically responds to stimuli. "Transcendence" (Marcuse 2002: 17, 77, 175) liberates the individual from the predominant one dimensionality, it implies an act of will which overcomes the behaviorist way of thinking.

All these terms, e.g., transcendence, conventionalized empathy, intuition and intellectual effort, are different names of one and the same concept. They all represent a certain act of will performed by a thinking individual directed at conceiving the meaning of linguistic signs. In order to achieve this goal, one should follow the logic of iconicity of sign transformation through the process of its existence. Iconic sign transformation can only be traced in interpretation of intersubjective representations that exist in the mind of others.

Unfortunately, the fetish character of communication leads to unification and depersonalization. Rossi-Landi (1983: 77) claims that at a certain point in time, the production and ex-

change of words and phrases become regular and systematic. The mechanical nature of communication transforms signs into simulacra, which "take on the appearance of autonomous existence" (Rossi-Landi 1983: 77).

Any sign can potentially turn into a simulacrum due to its dynamic nature and capacity to be endlessly commutable. According to Derrida, the very essence of signs lies in their ability of being repeated.

> A sign which does not repeat itself, which is not already divided by repetition in its "first time," is not a sign. The signifying referral therefore must be ideal—and ideality is but the assured power of repetition—in order to refer to the same thing each time (Derrida 2001: 310).

7. Transcendental Pragmatics as key to interpretation of linguistic signs as dynamic entities

Apel (1994: 78) introduced the concept "transcendental semiotics", which combines transcendental pragmatics and hermeneutics. This approach is designed to provide access to understanding of meaning. The meaning itself embraces three key elements, e.g., "subjective intention, linguistic convention and reference to things" (Apel 1994: 78). None of these constituent parts is hierarchically superior to the other two. They are equally important in "understanding and explicating the meaning of utterances or of written texts" (Apel 1994: 78). Boersema (2009: 143), analyzing Apel's ideas, emphasizes that in the process of interpretation and articulation of meaning, these key elements complement and restrict each other and serve as "regulative principles of inquiry".

In order to grasp the meaning of signs in dynamics, Peirce's focus on their triadic structure is insufficient, the introduction of the fourth element represented by the "communicative community" is essential. Apel's methodology transcends the interpretation of meaning by the cognizing subject beyond individual consciousness of one single person. Understanding,

from his perspective, is achieved by the transcendental subject, represented by a linguistic community, all members of which are involved in the act of communication and contribute to the process of reaching a consensus. Each member of this community "converts its understanding of symbols into real operative rules of behavior or habits" (Apel 1981: 29). Intersubjective communication between these subjects is not simply information exchange. It involves them in a language-game which, from a semanto-pragmatic perspective, is a prerequisite of reaching an agreement about the meaning of linguistic signs. What is more, intersubjective communication also reassures an argumentative discourse. Within the pragmatic dimension of this process, all the participants of language-games must be taken into account in "a very striking, anthropologically and socio-comprehensible sense as the precondition of the possibility for the perspectivistic interpretation of reality 'as something'" (Apel 1980: 99).

With Peirce and others, Apel claims to have "fallen back upon the normative conception of an ideal consensus to be established within an ideal and unlimited communicative community" (Apel 1998: 151). In other words, all rule-following rotates around an ideal of reaching a consensus, which is designated to regulate the way language as a semiotic system functions.

This leads Habermas to claim: A sign can fulfill its representative function only if, along with the relation to the objective world of entities, it simultaneously establishes a relation to the intersubjective world of interpreters" (Habermas 1992: 101). He argued that speech acts constitute a communicative practice, which is "oriented to achieving, sustaining, renewing consensus" (Habermas 1984: 17). The rationality of communicative practice is based on the consensus, achieved by intersubjective agreement. This definition implies the recognition of language as a social phenomenon, which is inherently rational.

8. Conclusions

Conventional nature of language makes its interpretation possible. According to Langacker (1987: 27), "speakers clearly have some conception of what does or does not accord with linguistic convention", i.e. "usage" can be interpreted as normatively sanctioned use (convention). Therefore, access to understanding grammatical structures is provided by native speakers' intuition. By employing Apel's concept of a linguistic community as a Transcendental Subject, it is possible to construe an image of an ideal respondent, providing the interpreter with objective knowledge about the meaning of a linguistic sign and a speech-form accordingly. Modern linguistics has been doing so, most probably unconsciously, by using multiple respondents in experimental studies. Statistical analysis of the totality of their answers helps researchers to reveal the conventional use of grammatical forms and unveil general grammatical principles.

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A linguistic study of humour and allusions in J. R. R. Tolkien's *Farmer Giles of Ham*

SZYMON PINDUR

Abstract

Farmer Giles of Ham is a satirical story by J. R. R. Tolkien. It is full of humour and allusions. The diversity of these elements allows for a detailed linguistic study distinguishing different levels at which the humour can be found and the different ways in which it is achieved. In the present paper, we attempt to discuss these devices and levels of humour and draw some conclusions on their effects. Our study is reinforced by a discussion of theoretical preliminaries of humour analysis, including the classification of the different levels, forms and devices of humour, as well as a brief discussion of the most widely acknowledged theory of humour – the incongruity theory. Using this theoretical framework, we explore the possibilities of viewing the phenomenon of humour in literature from a linguistic perspective and attempt to show the utility of this perspective in literature studies.

Lingwistyczna analiza humoru i aluzji w opowiadaniu J. R. R. Tolkiena pt. *Farmer Giles of Ham*

Abstrakt

Farmer Giles of Ham (*Rudy Dżil i jego pies* lub *Gospodarz Giles z Ham*) to satyryczne opowiadanie autorstwa angielskiego pisarza J.R.R. Tolkiena. Jest pełne humoru i aluzji, których różnorodność pozwala na dokonanie szczegółowej analizy lingwistycznej, w której mogą zostać wyróżnione poziomy, na których zachodzi efekt humorystyczny, oraz środki, poprzez które tenże efekt jest osiągany. Autor niniejszego artykułu podejmuje się omówienia tych dwóch aspektów, oraz przedstawia wnioski płynące z przeprowadzonej analizy. Studium wykorzystuje uprzednio przygotowane zaplecze teoretyczne analizy humoru, zawierające między innymi klasyfikację różnych jego poziomów i rodzajów, oraz środków używanych do jego wytworzenia. Zawarty jest w nim również opis jednej z najbardziej uznawanych teorii humoru, a mianowicie teorii niespójności. Przy użyciu tych podstaw teoretycznych, autor chce pokazać możliwości, jakie daje spojrzenie na teksty literatury z perspektywy lingwistycznej, oraz ukazać użyteczność tego podejścia w literaturoznawstwie.

Słowa kluczowe

humor, teoria niespójności, aluzje, środki językowe, analiza lingwistyczna

> The present author would like to dedicate the present paper to Zbigniew Pełczyński, Professor emeritus of Pembroke College, Oxford, and friend of J. R. R. Tolkien, for his encouragement to read *Farmer Giles of Ham* and presenting the author with its first Polish edition received from J.R.R. Tolkien himself.

1. Introduction

John Ronald Reuel Tolkien (1892-1973), apart from being a famous author, was a distinguished philologist and professor

of Anglo-Saxon at the University of Oxford, where he had also received his academic education. His academic interests were Anglo-Saxon literature and many extinct languages, including Old English, Middle English, Old Norse and Gothic. During his academic years, he worked on the team of the Oxford English Dictionary and made a great contribution to its first edition. On the grounds of literature, he is perhaps best known for such classics as *The Hobbit* and *The Lord of the Rings*, or the posthumously published *Silmarillion* and *The History of Middle-Earth* which are set in his imaginary world of Middle-Earth.

The so-called Middle-Earth legendarium, however, is not the only literary undertaking that Tolkien had embarked upon, as in the course of his lifetime he had written several short stories unrelated to Middle-Earth, and these are *Leaf by Niggle*, *Smith of Wootton Major*, *The Homecoming of Beorhtnoth* and *Farmer Giles of Ham*, the last of which is the subject of the present paper.[1]

Farmer Giles of Ham is set in a legendary time after the departure of the Romans and before the reign of King Arthur. Throughout the narrative, its main hero – Farmer Giles – has to face different perils: the first one is a stray giant whom he manages to scare away; the second one is a dragon invading the country, to whom Giles makes a promise to pay a ransom in exchange for sparing his life. However, when the dragon finally does that, Giles faces the king of the country, who claims his right to the dragon's money. The story ends with Giles driving the king away with the help of the Dragon and becoming the king himself.

The story was written in its early form to entertain Tolkien's children, but later it was enlarged and revised to be read out at a meeting of the Lovelace Club at Worcester College, Oxford, on 14th February 1938 where Tolkien was invited as a guest speaker. Hammond and Scull (2014: 16) state that "In the revised version he introduced most of the proper names, jokes, and allusions that enliven the book". By doing so, Tolkien had

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[1] *Farmer Giles of Ham* has been translated into Polish twice: by Skibniewska in 1962 and Frąc in 2008 (Tolkien 1962, 2008).

converted it from a children's story into a satirical story for adults (Hammond and Scull 2014: 66). Moreover, he refined it with a particular audience in mind, namely the Lovelace Club. Therefore it contains some allusions to life at Oxford University, which will be discussed in our analysis. As is apparent from the minutes of the meeting (Goodrum 2016) and one of Tolkien's letters (Tolkien 1981: 66), the reading of the story had a powerful humorous effect on the audience as it met with its exhilarated reaction. This encouraged Tolkien to publish the story in 1949. Its comprehensive critical edition by Wayne G. Hammond and Christina Scull appeared fifty years later including elaborate notes on various details of the narrative.[2]

The present paper aims to analyse various instances of humour in *Farmer Giles of Ham* in the light of one of the most widely accepted general theories of humour – the theory of incongruity. The analysis concentrates on what is commonly referred to in the literature as Verbally Expressed Humour (VEH), that is humour expressed by means of language (Attardo 1994: 96 as quoted in Ritchie 2004: 13). We concentrate on its mechanisms from a purely linguistic point of view and aim to examine some linguistic devices that introduce humour at various levels. In order to do that, in the following section, we discuss several theories of humour and present various methods of classifying VEH which will inform our analysis of *Farmer Giles* and put the present paper in a wider context of the study of humour in general.

2.   Humour analysis and its methods

2.1. Basic theories of humour

Humour is a very complex phenomenon and can be examined from many different perspectives. Researchers are certainly very far from being able to capture the nature of humorous phenomena within one, comprehensive and formal theory that

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[2] Our study includes extensive references to its revised (2014) version.

would, for instance, enable us to prime artificial intelligence with a human-like "sense of humour". This *essentialist approach* (as it is often called) stems from a presumption that there exists some essence of humour that is present in every humorous phenomenon. It is contrasted with *the anti-essentialist approach*, stating that humorous phenomena cannot be boiled down to a single essence or theory, which point is supported by scholars such as Eichinger Ferro-Luzzi (1990) or Goldstein and McGhee (1972: xxi) (Latta 1999: 5 as quoted in Jabłońska-Hood 2015: 97-98).

There are nonetheless several long-standing theories of humour, or rather classes of theories (although not un-disputed) that are able to capture some important elements of what humour is. Most authors, such as Attardo (1994: 47 as quoted in Jabłońska-Hood 2015: 109), Raskin (1984: 31), Buijzen and Valkenburg (2004: 147), Berger (2017: 2-5) and Meyer (2000: 312), distinguish three main classes of these theories: relief, superiority and incongruity.

The relief theories – often associated with the work of Sigmund Freud – state that humour is a form of releasing some nervous tension (Hurley et al. 2011: 44; Berlyne 1972: 43-60). It is argued that when the tension is released, it creates a pleasant feeling (e.g. laughter). The relief theories aim to look at humour from a psychoanalytical perspective and put it in relation to a person's psychology (Jabłońska-Hood 2015: 109).

The superiority theories view humour in a more social context and state that it arises through a feeling of being better than somebody or seeing faults in something or someone and making fun of them (Billig 2005: 39; Lintott 2016: 348; Kuipers 2006: 143-145). Such a feeling is also defined as *sudden glory* by Thomas Hobbes (1840: 46), one of the advocates of that theory.

The most widely accepted theories of humour are those of incongruity (Ritchie 2004: 46; Ross 1998: 7; Hurley et al. 2011: 45; Franklyn 2006: 77). Their premise is that humour involves some type of incongruity or, in other words, it is

centred on introducing something unexpected or absurd in a certain situation – an element of surprise – that very often has an impact on our perception of that situation or sheds some new light on our understanding of it (Deckers and Kizer 1975: 215). The humorous effect occurs when the perceiver can understand the incongruous element and see its connection with the situation (Suls 1983: 41-42; Jabłońska-Hood 2015: 111). That is the reason why a joke is not funny for a certain person if they need someone else to explain it to them after failing to understand it on their own.

2.2. Linguistic approaches in studying humour

Apart from the basic theories of humour, various scholars, for instance, Raskin (1984) and Attardo (1989 as quoted in Attardo and Raskin 1991: 294) propose to look at humour from a strictly linguistic perspective and devised several linguistic theories of humour. The first one – the Semantic Script Theory of Humour (SSTH) formulated by Raskin (1984) – states that each instance of humour expressed through language needs to be compatible with at least two opposite semantic scripts. A semantic script is, as Raskin writes, "a large chunk of semantic information surrounding the word or evoked by it" (Raskin 1984: 81). In other words, it should be possible for language users to read a specific text in at least two opposite ways for the text to be humorous.

Raskin's theory was later extended by Attardo and Raskin (1991) resulting in the General Theory of Verbal Humour (GTVH), which classified the script opposition as being one of the six *Knowledge Resources* informing the structure of a joke, with the other five being: Logical Mechanism – logical connection between the opposing scripts (Masaeli and Heidari-Shahreza 2016: 232); Situation – reality described; Target – the person or object being referred to in the joke or ridiculed by it (optional); Narrative Strategy – the organisational structure of the joke; and finally Language – the medium necessary to verbalize the joke. It is worth noting that the

GTVH theory was later developed to take into account other humorous texts with a different structure than that of a joke (Attardo 2001).

These are the most popular linguistic theories of humour. They have been employed in various linguistic studies of humour in specific texts, for example in Antonopoulou (2002), Masaeli and Heidari-Shahreza (2016), Corduas et al. (2008) and Saude (2018). On the other hand, there are also linguistic studies which apply the general theories of humour, for instance, the incongruity theory, e.g. Magnotta and Strohl (2011) or Adjei (2015). This last approach will be assumed in our study, for reasons briefly outlined below.

2.3. Why incongruity?

Virtually any of the above-mentioned theories of humour could be effectively applied in a linguistic analysis of humour in *Farmer Giles of Ham*. Nevertheless, we deem the incongruity theory to be the most suitable for this task mainly because it concentrates more on the structure of the stimuli that evoke humour, i.e. humorous events etc., and less on our relation to these stimuli, as opposed to the superiority theory for instance. Additionally, we have chosen the incongruity theory because it fits well the narrative of *Farmer Giles* which is full incongruous elements and provides a big amount of data that can be analysed with the use of that theory. Finally, it is very simple and thus versatile in addressing various instances of humour, which is what we will attempt to demonstrate in our analysis. Therefore we now proceed to present the specific theory and methods that will be used in our analysis.

2.4. Types of incongruity

Ritchie (2004: 49-50), in his discussion of incongruity, describes two of its distinctions in the literature of the subject. These are *static* vs. *dynamic* incongruity and *inherent* vs. *presentational* incongruity.

In the first distinction, the first type of incongruity is called *static* as it arises from a certain absurd or incongruous configuration of objects or concepts and is perceived at once as a whole. As Ritchie (2004: 49-50) writes, "The static form of incongruity can be a property of a particular situation or configuration of elements, or even an event if it is sufficiently brief that it is regarded as instantaneous". A good example of this could be a concept of a dragon in sweatpants.

The second part of this distinction – the *dynamic* incongruity – is one that arises rather from a sequence of events or concepts incongruous to one another. As Ritchie (2004: 49-50) observes, "the oddity or incongruity does not involve a configuration of objects perceived all at the same time, but the temporal sequence of events or ideas creates the effect". An example here could be an elephant which tries to kill a fly on its head with its trunk and every time it slaps it, it misses and slaps itself on the head to the point when it knocks itself unconscious.

The second distinction tries to determine whether the incongruity lies in a situation or a concept itself – *inherent* incongruity – or depends on the way a certain situation is described creating an amusing effect – *presentational* incongruity. Both of the above-mentioned examples can be deemed as inherent, whereas an example of presentational incongruity could be, as Ritchie (2004: 50) proposes: "Oscar Wilde's description of fox-hunting as the 'unspeakable in full pursuit of the uneatable'".

Ritchie (2004: 50) combines these two distinctions and thus discerns four possible types of incongruity: static inherent (combination of objects/concepts funny on its own), static presentational (combination of objects/concepts funny thanks to the way they are presented), dynamic inherent (sequence of events funny on its own) and finally dynamic presentational (sequence of events funny thanks to the way they are presented). It is important to note that all of these forms of incongruity can be found within Verbally Expressed Humour,

which makes this distinction useful for the analysis presented in this paper.

2.5. Levels of incongruity

Apart from distinguishing the types of incongruity, one can distinguish several levels at which incongruity can occur. First of all, the Verbally Expressed Humour can be divided into verbal humour (depending on the linguistic elements e.g. ambiguity in puns) and referential humour (depending on the reality described e.g. situational humour in jokes) (Ritchie 2004: 13). However, for the use of the present paper, we propose a further distinction of these levels, which is presented in Figure 1.
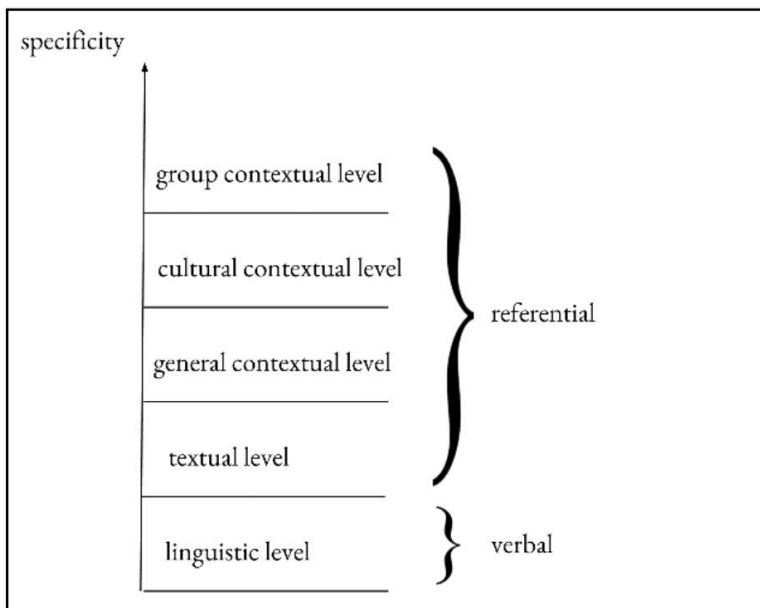
Figure 1

The distinction proposed is based on the question of what knowledge one should possess in order to understand certain humorous element, whether it is just the knowledge of the language (*linguistic level*), the knowledge of a certain text (for example, a story) in which it occurs (*textual*), the general knowledge of the world (*general contextual*), the knowledge of the specific culture and its customs (*cultural contextual*) or finally the knowledge of a certain circle or group of people (*group contextual*). In order to understand linguistic (verbal) humour, one should just understand the language in which it is expressed, and to understand textual humour, one should know the contents of the specific text and so on.

Thanks to such distinction, it can be explained, for example, why certain jokes are funny only to one group of people and not others, as in order to understand them, very detailed knowledge of this circle and its manners and ways of life is required. Such jokes are most commonly referred to as *inside-jokes.* As will be shown in the analysis, Tolkien included several inside jokes in *Farmer Giles of Ham* which will be discussed as well.

2.6. Devices causing incongruity

Having established what the types and levels of incongruity are, one can also list several ways or devices through which the incongruity (and, consequently, the humorous effect) can be achieved.

A very common device is a joke, being a very short story or anecdote with a humorous ending, which comprises of a build-up (a narrative or a dialogue describing a certain situation) and a punchline (final portion of the text with a surprising turn, which evokes some incongruity). But apart from a joke, which is a rather hermetic unit and, in most cases, does not require any context to be uttered, there are many ways in which humour occurs in other uses of language, for example, day-to-day conversations. Dynel (2009) defines it as conver-

sational humour. She distinguishes various devices which can make a conversation humorous, and these are as follows:

- lexemes – lexical units used for a humorous effect which are relevant to the whole utterance; most of them are neologisms, or novel words with a new meaning, often formed through various word-formation processes, e.g. "*adultery* – a state of being an adult" (Dynel 2009: 1287);
- phrasemes – similar to lexemes, except that these are whole phrases and not individual words or compound words;
- wittisisms and retorts:
  - o witticisms – clever remarks used in conversation and giving it some new meaning, resembling a punchline in a joke;
  - o retorts – unexpected, often cheeky responses to some utterance;
- stylistic figures:
  - o simile/comparison – usually of absurd nature, which causes incongruity;
  - o metaphor – based on an incongruous conceptual similarity between the object of the metaphor and the device of the metaphor, e.g. *He's got a PhD in procrastination*;
  - o hyperbole or understatement (meiosis) – exaggerating or diminishing something which causes an incongruous or sarcastic effect;
  - o paradox – a statement showing internal contradiction, e.g. *That was very unkingly of the king*;
  - o irony – a statement with the literal meaning opposite to the implicit meaning;
- puns – statements based on a linguistic ambiguity at some level, which can have at least two interpretations and thus are incongruous;
- allusions – statements either referring to some other text or situation, often changing slightly its original form or meaning or directly quoting some text relevant to the situation;
- register clashes – describing something with unnecessarily elevated language or unnecessarily trivial language causing an incongruous effect;

- teasing:
  - mocking or imitative response to some utterance, jocularly challenging;
  - banter – an exchange of teases;
- putdowns/mockery:
  - ridiculing something or someone;
  - self-denigrating humour – a kind of putdown ridiculing oneself.

This classification can be contrasted with another one proposed by Shade (1996: 2-5) who divides verbal humour into twelve categories: pun, riddle, joke, satire, limerick, parody, anecdote, farce, irony, sarcasm, tall tale and wit. However, for the purpose of the present paper, we will use the classification suggested by Dynel, as it is more precise and linguistically oriented. Of course, the completeness of such lists may be always disputed, as in some cases, perhaps, incongruity could be induced by some other factor or in some other way. Nonetheless, the devices listed above are the most common ways of introducing a humorous effect and occur very frequently in *Farmer Giles of Ham* – as will become apparent in the analysis. Besides, Dynel mentions the devices of conversational humour, and even though these devices have similar effects in various uses of language (everyday conversations, stories, plays, songs etc.), they vary depending on the type of those uses, e.g. other devices can occur in stories and everyday conversations.

This being so, we would like to introduce yet another device that is common in literature, namely grotesque. It can be roughly defined as a figure (a character, object or even a situation) in literature which violates some characteristic features of its prototype. In other words, it is an absurd distortion of a prototypical image of a certain thing. It is the essential element of satire, which is a form of ridiculing and mocking certain behaviour or a person. It can be found in various places in *Farmer Giles*. Grotesque and satire can be classified as a type of literary sarcasm, which is also meant to mock and ridicule something. Under this category we can also

find such devices as irony, hyperbole, meiosis, mimicry and mockery, also quite common in the story.

2.7. Closing remarks on the methodology

While analysing each instance of humour in the story, we will attempt to answer questions such as:

- − In what way is it humorous?
- − On what level is it humorous?
- − How is the humour achieved?

Using the criteria presented in this section, we will be able to categorize and even quantify the humour in the story and closely examine its mechanisms. We will try to find the mentioned types and levels of incongruity and the devices used to induce it.

The discussion of the humorous elements could be arranged in many ways, either chronologically or according to the type, level or device of incongruity. Even though the first arrangement would be a more natural one, for the sake of clarity we have arranged our analysis by the most commonly used devices correlated with the levels of incongruity. Thanks to this method, we can extract the most important humoristic elements and avoid getting lost in the unnecessary minutiae of the narrative. In the analysis, we will concentrate on devices such as:

- − puns and wordplay (linguistic humour);
- − register clashes (linguistic humour);
- − intratextual links, paradoxes and situational humour (textual humour);
- − anachronism (general and cultural contextual humour);
- − grotesque and general sarcasm (general and cultural contextual humour);
- − extratextual allusions (cultural and group contextual humour).

These are the most common devices introducing humour (in the form of incongruity) in *Farmer Giles of Ham*. Their various instances are analysed in the following section in accordance with the methodology presented before.

3.   Analysis and discussion of humour in the story

3.1. Introductory remarks

Just to show the scale of the humorous phenomena in the story, we have vertically aligned all utterances of the narrator and the characters in the story in one column. Every utterance introducing some form of humour (conforming to the criteria discussed in the previous section) to the story, is marked in the column. The entire story, arranged utterance-by-utterance, is presented in the Figure 2.

As can be seen, the utterances containing humour are quite frequent and fairly equally distributed in the whole story. This is very crucial for the effect it presumably had on the audience (the Lovelace Club) as thanks to the frequent emergence of the humorous elements, the amusement of the audience could be kept at a relatively high level throughout the reading.

From a statistical point of view[3], out of the total of 1007 utterances in the story (excluding the foreword which was not present in the version for the Lovelace Club), as many as 375 contain some form of humour or are a part of a larger structure introducing it (e.g. a build-up for a joke, or develop-ment of some humorous detail). The humorous utterances amount to ⅓ of the whole narrative.

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[3] For similar approaches to humour analysis see Attardo (2001) and Cor-duas et al. (2008).

Linear arrangement of the narrative
(humour marked in black)

The Giant comes
to Ham.

Giles confronts
the Giant.

Giles is praised
for driving
the Giant away.

The Dragon
comes to Ham.

Giles prepares
to confront
the Dragon.

Giles confronts
the Dragon.

The King
comes to Ham.

Giles sets out
to confront
the Dragon again.

Giles confronts
the Dragon.

Giles triumphantly
returns to Ham.

Giles confronts the
King and proclaims
independence of his
'Little Kingdom'.

Figure 2

Of course, some may raise the objection that humour can lie beyond determined structures and it is either impossible or useless to try to quantify it within such units. We do not deny this multidimensional nature of humourous phenomena. Nevertheless, when we narrow humour down to incongruity and establish different types of concrete devices that introduce it, we can at least determine whether a given utterance includes any of such devices or not. By distinguishing the utterances that include these devices and thus introduce incongruity, we can see the distribution of such utterances within a larger portion of text. This may not provide us with an exhaustive coverage of *all* humour that can lie in the story but at least gives us an idea of the frequency and distribution of specific devices that can, in turn, be markers of incongruity – an important substrate of humour. Therefore let us now take a closer look at various forms of humour that can be identified in the story using the proposed criteria.

3.2. Linguistic humour: puns and wordplay

Tolkien, being a philologist, loved to weave puns and jocular wordplay into his narratives. *Farmer Giles of Ham* is a chief example of this, with many puns that can be identified throughout its narrative.

The first instance of a pun occurs at the very beginning of the story, where it is said that Giles lives in the village of Ham which is described as being "only a village" (p. 39). This is a form of verbal (linguistic) humour, as the meaning of *Ham* in Old English is simply 'village' (Hammond and Scull 2014: 198). For the audience at the Lovelace Club (with many of them having some understanding of Old English), the meaning was undoubtedly explicit, so its unnecessary explanation produced an incongruous effect.

Another example of linguistic humour is the interjection "Blast!" uttered by the giant when shot by Farmer Giles from

a blunderbuss.[4] It is based on the ambiguity of the word *blast* with one meaning being an interjection, and the second being an onomatopoeic expression for an explosion or a shot from a firearm. It is rather ironic for a giant to use this word while being shot at.

Linguistic humour can also be found in a dialogue between Giles and his dog when it wants to warn Giles against the giant coming: "'What's *come to you*, you fool?' 'Nothing,' said the dog; 'but *something's come to you.*'" (p. 44). It includes wordplay on the ambiguous phrase *come to somebody* with idiomatic meaning 'to come to one's mind' (especially speaking of something crazy) and literal meaning of something actually coming to someone. In the pun, the dog refers to the giant *coming* to Giles' fields.

Another example of a pun is when the giant (previously said to have been near-sighted and deaf, and having lost his way) is said to be "making off about *nor-nor-west* at a great pace" (p. 48). This pun is made by using the shortened form *nor-nor-west* standing for 'north-north-west' in which the morpheme *nor* can also mean negation suggesting that the giant did not have any idea about the direction he had been walking in.

Yet another pun in this fragment occurs when the giant (having been described before as very stupid) tells his relatives that he might return into Giles' lands "when he has a mind" (p. 58). This pun is based on the idiomatic reading of the phrase *to have a mind* meaning 'to fancy doing something' and on its literal, word-for-word reading.

Another wordplay can be found at the end of the story where Giles' wife (having been described before as a very obese woman, just like her husband) "made a queen of *great size* and majesty, and she kept a tight hand on the household accounts. There was no *getting round* Queen Agatha – *at least it was a long walk*" (p. 130). The first part, mentioning "great size" is obviously based on the literal and metaphorical meaning of 'being great'. The second is a constructed joke, suggesting at

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[4] See section on 3.5. on anachronism.

the beginning that it was difficult to oppose the queen
(idiomatic reading of *to get round somebody*) and later shifting
the reading of that phrase from non-literal to literal with the
phrase "at least it was a long walk". We can see here the
distinction between static and dynamic humour, as the first
sentence is of the static kind (perceived instantly without any
sequence) and the second sentence is of the dynamic kind
(requiring a constructed sequence to introduce a humorous
effect).

Those are, of course, not all of the puns and wordplays that
can be found in *Farmer Giles*, but they are sufficient to expose
Tolkien's skills in that area and the details of the construction
of his puns. Now we will analyse another device introducing
linguistic humour, namely the register clashes.

3.3. Linguistic humour: register clashes

As mentioned in section 2.6, register clashes occur when the
unnecessarily elevated style is used in a rather trivial context
or vice versa.

The primary example of a register clash in *Farmer Giles* is
the use of Latin in various places of its narrative. It is
connected with the historic placement of the story, as stated in
the foreword "before Arthur or the Seven Kingdoms of the
English" (p. 34), a time when Latin was still used as an official
language in names and documents and English was the
language of the common folk and regarded as "vulgar" (in the
sense of 'plebeian'). What creates this register clash is the
contrast between grandiosely sounding Latin names and
expressions and their commonly sounding, unsophisticated
English counterparts. It is often used for a sarcastic and
mocking effect by the narrator.[5]

This register clash can be seen, for instance, at the
beginning when Farmer Giles is introduced:

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[5] See section 3.6.

> In full his name was *Aegidius Ahenobarbus Julius Agricola de Hammo*; for people *were richly endowed with names in those days*, now long ago, [...] However, those days are now over, so I will in what follows give the man his name *shortly*, and in the *vulgar form:* he was *Farmer Giles of Ham*, and he had a red beard. (p. 37-38)

It is apparent here that even the names of the ordinary people were so elaborate (just as those of the Romans), so the names of the more nobly born ought to have been even more elaborate, for example, the name and titles of the King: "Augustus Bonifacius Ambrosius Aurelianus Antoninus Pius et Magnificus, dux, rex, tyrannus, et basileus Mediterranearum Parfium" (p. 54).

Moreover, as mentioned previously, Latin was the official language of the court and all of the King's speeches and documents were written in it, so the parson (who knew Latin of course) had to translate all of them to be read to the villagers of Ham. This creates a sort of incongruity between the characters, as the king, using Latin (and plural number while referring to himself), appears to stand out of the whole story in which every character speaks "normally" and uses unsophisticated language. This sort of clash between Latin and "the vulgar" is eliminated when Giles becomes the king of his Little Kingdom as "the vulgar tongue came into fashion at his court, and none of his speeches were in Book-Latin" (p. 130).

Other examples of the clash between Latin and "the vulgar" include the name of Giles' ancient sword *Caudimordax,* or *Tailbiter* in the vulgar, or the names of other characters such as the Dragon – *Chrysophylax,* or the blacksmith – *Fabricius Cunctator.*[6]

Apart from the Latin-vulgar clash, there occur also other clashes of style in the story. One of such clashes can be found in the fragment when the King sends Giles a sword in appreciation of his fight against the giant: "*so prompt an expulsion of a giant so injurious* seemed worthy of note and

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[6] For more discussion of the Blacksmith see section 3.4.

some little courtesy" (p. 53), which is incongruous because of the inversion creating very pompous effect contrasting it with the common style of the rest of the narrative.

Another high-to-low clash occurs when the parson speaks to the dragon: "'*Vile Worm*!' he said. 'You must bring back to this spot all your *ill-gotten* wealth'" (p. 92). This would have been actually a natural way of speaking to such a legendary creature as a dragon, but it is incongruous because the dragon himself paradoxically has a very common and polite style of speaking: "*Excuse my asking*, but were you looking for me *by any chance*?" (p. 82) or "'Chrysophylax is my name,' said he, 'Chrysophylax the Rich. *What can I do for your honour?*'" (p. 86). The manners of the Dragon are quite similar to another dragon of Tolkien, namely Smaug in *The Hobbit*, whose manner of speaking Tom Shippey (2000: 69) compares to a twentieth-century upper class Englishman speaking with "elaborate politeness, even circumlocution, of course totally insincere".

Finally, a register clash occurs when Giles meets the King who wants to reclaim the treasure Giles' got from the Dragon. Contrary to what might be expected while meeting such an important person, Giles (being a very simple-minded man) greets the King with a simple "good morning". His nonchalance infuriates the King to the point where he, ironically enough forgets to use his own, elevated style: "'Give *me* my sword!' shouted the King, finding his voice, but *forgetting his plural*" (p. 125). What is more, Tolkien uses here something which could be called "register exchange", because Giles (most probably speaking in the name of himself and the dragon) uses the plural number when he cheekily answers: "Give *us* your crown!" (p. 125).

Such an artful and frequent usage of a register clash, reveals Tolkien's mastery when it comes to language. It gives a hint of his vast philological knowledge, exceptional even among Oxford academics. This was most probably one of the reasons why *Farmer Giles* was so highly appreciated by the Lovelace Club.

3.4. Textual humour: paradoxes, links and situational humour

As explained in section 2.5, the textual level of incongruity is based on the knowledge of the text and is text-specific. In other words, it is effective only when it is put in relation to the reality described in the text. For example, there is a blacksmith in *Farmer Giles* who is very pessimistic and loves to predict that some disaster is coming, yet he is, somewhat paradoxically, called Sunny Sam by the villagers.

This paradox introduces incongruity and thus is, in itself, humorous. Moreover, once it is introduced, it is utilised several times within the text in the form of an intratextual link (referring to some other place of the text to introduce humour). Whenever something bad happens in the story, a triumphant reaction of the Blacksmith is mentioned, even though probably he would not be mentioned at all if the bad thing had not occurred. Such allusions are made in the form of quick interjections. For example, when the Dragon promises to return to pay his ransom on the day of the feast of St Hilarius and Felix, the Blacksmith does not like the sound of those names (which is caused by the association of Hilarius with the English *hilarious* and the Latin *Felix* meaning 'happy') [7] or elsewhere, when the Dragon does not come on the promised day, the Blacksmith "walks about whistling". Such allusions, even though they are entirely redundant for the narrative, add more humour to it and make the reader (or hearer) "connect the dots" within it, making it more humorous.

A similar example of such intratextual links are the mentions of the Miller every time something good or bad happens to Giles. It is humorous because they are said to be "bosom enemies". Every time something good happens to Giles, it is mentioned that the Miller is angry or envious of him, and

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[7] In this element we can see the mingling of the levels of humour, as it is combined with linguistic humour. Tolkien often mixes different types and levels of humour in the story to produce a uniquely humorous effect.

every time something bad happens to Giles, the Miller is happy or laughs.

Apart from the paradox of the pessimistic blacksmith being called Sunny Sam, another paradoxical element of the story is the reaction of the villagers to the news about the coming of the Dragon. In spite of what could be expected, the news meets with a rather cheerful and nostalgic reaction (before they learn that the Dragon is quite dangerous). That reaction is because of a tradition mentioned in the story of cooking Dragon's Tail for Christmas, which was a real dragon tail in the old times.[8] This situation is an example of textual humour because it requires some explanation of certain details in the text itself (the story about cooking Dragon's Tail) to be understood as funny.

There are many other instances of textual humour in the story, either paradoxes, links or funny situations, such as that with the Giant, who erroneously thinks that the shot from a blunderbuss in his face was a horsefly bite, or the scene with the Dragon's panic escape being chased by Giles and his angry mare, or finally the scene with the parson of the village Oakley "rather rashly" trying to "dissuade the Dragon from his evil ways" before being eaten (p. 67). Many of these funny situations are inextricably linked to the features of various characters and their grotesque nature. Nevertheless, they somehow let the grotesqueness become more evident and contribute to the absurdity of the story and its overall funniness.

3.5. General and culture contextual humour: anachronism

Incongruity, being the most important ingredient of humour is introduced also by anachronism. What is meant by that term is a misplacement of some feature or object in time (an intentional chronological or historical error), which produces an incongruous effect.

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[8] See section 3.7. on allusions.

The best-known example of it in *Farmer Giles* is, of course, the blunderbuss, which is used by the Farmer to drive the giant away. The blunderbuss (a large sixteenth-century gun) is anachronistic because the story is set in purely medieval, legendary times in which firearms do not yet exist.[9]

Another anachronism in the story can be found in the offer made by the Dragon that he will pay each of the villagers "two golden guineas" if they set him free (p. 89). The guinea was an eighteenth-century British coin, which was originally minted of gold from Guinea, Africa (Hammond and Scull 2014: 212). So the fact that the guineas appear in *Farmer Giles* is purely ahistorical. Both of these anachronisms are of the *inherent* type of incongruity (lying in the situation itself and not in the way it is presented).[10]

An anachronism of the second, *presentational* type of incongruity can be found in the comparison of the Dragon carrying a great deal of treasure on his back by to the "royal pantechnicon". A pantechnicon is defined by Hammond and Scull as a "name of a bazaar of all kinds of artistic work [or] a large warehouse for storing furniture, and colloquially by extension, a furniture-removal van" (Hammond and Scull 2014: 217). The first use of the word dates back to the late nineteenth century so it is anachronist to use it in *Farmer Giles*. It is *presentational* because it lies in the description of a certain situation, adding a humorous effect.

What anachronism does, apart from being incongruous, is that it brings the legendary story closer to the modern reader. It makes it more familiar. That is somewhat paradoxical, as the same device that makes the story more absurd, makes it at the same time more natural. This strengthens its incongruity even more because that is precisely its function – introducing something unexpected and yet possible to be linked in some way to the situation.[11] In the case of anachronism, the

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[9] It is also connected with an allusion which will be extensively discussed in section 3.7.

[10] See section 2.4.

[11] See section 2.6.

anachronistic elements are incongruous with the story and yet more natural to the reader, who can trace this incongruity and thus understand the humour.

3.6. General and culture contextual humour: grotesque and sarcasm

As observed in section 2.6, one of the most prevalent humorous elements in *Farmer Giles* is grotesque. Many of its main characters and elements of the narrative have some bizarre and absurd features which evoke cultural and general contextual incongruity. The characters with grotesque features include Giles himself, the Giant, the Dragon, the Blacksmith and to some extent the King's knights. They all contradict the cultural stereotypes of their kind. Each of them is briefly analysed below.

The main hero of the story, Farmer Giles, seems at first to be a rather typical, independent English yeoman with no strange features (except for the fact he owns a blunderbuss). However, his character becomes more grotesque as he practically becomes a warrior and prepares to face the Dragon. Tom Shippey in *Author of the Century* describes him as "a kind of anti-Beowulf, with his extremely amateurish preparations for fighting the dragon". Instead of chainmail, Giles has the blacksmith stitch metal rings onto his old leather jerkin. Here follows the description of his dressing for battle [our emphasis]:

> Then Giles put on his top-boots and an old pair of spurs; and also the leather-covered helmet. But at the last moment, he *clapped an old felt hat over the helmet*, and *over the mail coat he threw his big grey cloak*. `What is the purpose of that Master?' they asked. `Well,' said Giles, `*if it is your notion to go dragon-hunting jingling and dingling like Canterbury Bells*, it ain't mine. It don't seem sense to me to let a dragon know that you are coming along the road sooner than need be. And a helmet's a helmet, and a challenge to battle. *Let the worm see only my old hat over the hedge*, and maybe I'll get nearer before the trouble begins.' They had

> stitched on the rings so that they overlapped, each hanging loose over the one below, and *jingle they certainly did.* The cloak did something to stop the noise of them, but *Giles cut a queer figure in his gear.* They did not tell him so. (pp. 78-79)

Giles clearly breaks the stereotype of a brave and gallant knight, being a very grotesque version of one. Not only does he have strange looks for a knight, but he also lacks courage and goes to find the Dragon to save his reputation, hoping that he never finds the dragon at all. The fact that he manages to chase the dragon is only thanks to luck and his grey mare (who is said to be the true hero of the story in one of its earlier versions) (p. 177).

Another grotesque character is the Giant. His grotesqueness is predicated on the fact that he is "near-sighted and also rather deaf" (p. 40). This is not a feature which one would expect of a typical giant. This takes effect in the absurdity of this character and makes his emergence in Giles lands way less serious giving it a strong satirical flavour.

Yet another grotesque character is the Dragon, who, again contrary to the expectations, is very cowardly and has a very cultured manner of speaking[12]. This feature of the Dragon contributes to the humorous nature of his every encounter with Giles, and the fact that Giles manages to chase him down the village road and finally make him pay his ransom and carry it to the village on his own back. The grotesque nature of both "villains" in the story makes it very absurd and incongruous, contributing largely to its humorous effect.

Finally, the grotesqueness manifests itself in some minor characters, such as the Blacksmith Fabricius Cunctator (literally 'lingering producer') who is very reluctant to do any work in his smithy. Quite similar to him, are the King's knights, who are reluctant to fight the dragon and are preoccupied with fashion, etiquette and tournaments instead of real combat.

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[12] See section 3.3.

Apart from grotesque characters, the satirical nature of the story can be seen in its sarcastic narrative style, often mocking and making fun of the characters. Here follow several examples of his style:

> When the king speaks to the people of Ham: "Augustus Bonifacius rex et basileus was *graciously pleased* to address them." (p. 95)

> When the Dragon eats the parson of Oakley: "*Rather rashly* the parson had sought to dissuade him from his evil ways". (p. 67)

> When the Dragon assaults the King's knights while they are talking about the order of precedence in the court etiquette: "*The argument concerning precedence stopped short.* All the horses shied to one side or the other, and some of the knights fell off: The ponies and the baggage and the servants turned and ran at once. *They had no doubt as to the order of precedence.* [...] their steeds took charge of them, and turned round and fled, carrying their masters off, whether they wished it or no: *Most of them wished it indeed.*" (p. 107)

The grotesque and sarcastic style of narrative combined is one of the story's main sources of incongruity and humour. It is them that give the story its unique flavour and the air of funniness. But right next to them are the allusions made by Tolkien to several aspects the English culture and the Oxford academic life. The main allusions are discussed in the next section.

3.7. Culture and group contextual humour: allusions and references

The main allusions in *Farmer Giles* discussed here include:

– allusions to the Editors of the *Oxford English Dictionary*;
– allusions to philologists (Tolkien's profession);
– an allusion to Oxford Colleges' traditions.

They are subsequently analysed in the above order.

3.7.1. "The Four Wise Clerks of Oxenford"

Perhaps the most famous allusion in the story is the above-quoted mention of "The Four Wise Clerks of Oxenford" who try to define a blunderbuss (Tolkien 2014: 45-46). It is a double allusion, as it occurs at both group and cultural contextual levels.[13] The head of the phrase "Clerks of Oxenford" alone is a cultural contextual allusion to Geoffrey Chaucer's *Canterbury Tales*: "A Clerk there was of Oxenford" (as quoted in Hammond and Scull 2014: 201). Whereas the fact that there were four of them is an allusion at the group contextual level to the four editors of the *Oxford English Dictionary*, a project Tolkien himself was involved in (Hammond and Scull 2014: 201).

The further irony arises from the latter part in which the narrator sarcastically dismantles the perhaps not-so-wise-after-all clerks' definition of a blunderbuss (which is an actual quotation from the real OED) sentence by sentence, making it look entirely incompatible with the reality.

> A blunderbuss is a short gun with a large bore firing many balls or slugs, and capable of doing execution within a limited range without exact aim. (Now superseded in civilised countries by other firearms.)' However, Farmer Giles's blunderbuss had a wide mouth that opened like a horn, and *it did not fire balls or slugs, but anything that he could spare to stuff in*. And *it did not do execution, because he seldom loaded it, and never let it off*. The sight of it was usually enough for his purpose. And this country was not yet civilised, for the blunderbuss was *not superseded.* (p. 45-46)

The two allusions are quite auto-ironic of Tolkien, as he was not only a real clerk of Oxford himself but also he was involved with the OED and he once said of this experience: "I learned more in those two years than in any other equal period of my life" (Carpenter 1977: 121). It may be, though, that Tolkien makes fun of the Editors as Tom Shippey writes that Tolkien,

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[13] See section 2.5.

"perhaps as a result" of working on the OED "continually disagreed with [it] and even went out of his way (in Farmer Giles of Ham) to mock" (2000: 33). Nonetheless, these allusions form an inside joke (on the group-contextual level) designed for people familiar with the circles of Oxford University and the *Oxford English Dictionary*.

3.7.2. The parson grammarian

Another allusion related to Tolkien himself is the allusion to his profession – a philologist. It can be found in the reference to the Parson: "He was a grammarian, and could doubtless see further into the future than others" (p. 93). As Hammond and Scull observe, "A *grammarian* is an expert in grammar or languages in general, a philologist. However in the Middle Ages popular belief held that grammar (chiefly Latin) included knowledge of magic and astrology" (Hammond and Scull 2014: 213).

Shippey, in *The Author of the Century*, citing the OED, states that grammar was associated with "gramarye = Occult learning, magic, necromancy". Moreover, he observes that in spite of Tolkien making fun of the view that philologists may have some insight into the future, the Parson manages to accurately foresee what is going to come, by suggesting Giles take a rope when going to find the Dragon, which proves very vital later in the story. This leaves a hint that there might be some truth in this old belief (in a metaphorical sense of course) and that philologists should be taken seriously. Shippey also writes that *Farmer Giles* "shows Tolkien at ease with himself" making jokes and laughing even at himself and his profession (2000: 322-329).

3.7.3. Oxford college traditions

A very interesting part of the story is the description of a tradition of serving a Dragons Tail at the King's court at Christmas, which is why, as mentioned earlier, the people were

excited about the coming of the Dragon. The Tail is said to be carried by one of the knights to the King's table to the sound of music (p. 56-57). Hammond and Scull observe that another tradition is very similar, namely the Boar's Head Ceremony, which is held at the Queens College, Oxford (Hammond and Scull 2014: 205). Mentioning the ceremony with the Tail, Tolkien most probably alludes to the Boar's Head Ceremony, with which the audience at the Lovelace Club was certainly familiar. The allusion is deepened when Tolkien mentions that the Tail is no longer real, but made of cake and almond-paste.

This allusion is very vital because it associates the academia with the King's court which is, as Shippey writes, characterized by "magniloquence, book-Latin, style at the expense of substance [...] and a reluctance to take old tales seriously" (2000: 324), which is a point largely condemned by Tolkien in many of his works, including *Farmer Giles* and the essay *On Fairy Stories* originally planned to be read to the Lovelace Club. This can be viewed as a satire on certain tendencies among scholars and was probably very clear to the members of the Lovelace Club.

3.7.4. The implications of the allusions

The allusions included in *Farmer Giles* can be regarded as crafted specifically for the audience at the Lovelace Club. Apart from being humorous themselves, they seem to have a somewhat educational function and carry an important message that Tolkien probably wanted to weave into his seemingly innocent and light-hearted story. That message extends onto the whole story which, as Shippey (2000: 323) writes, "makes a point and a rather aggressive one" about the value of fairy tales and the importance to take them seriously.

4. Conclusions

Even though the above analysis does not cover all the instances of humour and allusion in the story, it attempts to

give its cross-sectional view and uncover the patterns and constructional details that can be found in its humorous elements. Based on the analysis, we can draw several conclusions regarding the humour in the story and its effects on its original audience and its readers today.

First of all, the humorous elements used by Tolkien in the narrative are very diversified and numerous. This makes the story more entertaining for the recipient and shows Tolkien's exceptional skills with humour and narrative construction which are apparent in many of his literary works.

Moreover, the humour occurs at many levels, including linguistic, textual and contextual, which makes the story appealing to a wider audience (even in spite of the inside jokes that were meant for the Lovelace Club). The diversification of the levels and devices increases the incongruity of the humorous elements as their emergence in the story is even more unexpected, which adds more depth to the story and keeps the reader/hearer more engaged.

Apart from this, as shown in Figure 2, it is apparent that the incongruous elements are equally distributed in the story, which arguably keeps the entertainment at a relatively high level throughout the reading. An even higher concentration of these elements can be seen at the story's climactic points (e.g. "Giles confronts the Dragon" or "Giles confronts the King…" etc.). This may strengthen the humorous effect as well, especially that if it were not for its satirical flavour, these climactic points could be, in contrast, presented in a more elevated and legendary style. This way the pathos that would regularly appear in a legend is replaced by humour.

Besides, the incongruities in the story such, as anachronism, by making it more distant from its legendary or mediaeval setting, make it closer to the contemporary reader. This can arguably have a good introductory function for people who are sceptic about legendary stories and fairy tales. The fact that it is funny serves the idea Tolkien had about reviving old stories and reasserting their relevance.

It can be argued that a linguistic approach to analysing literature can provide us with interesting information on the style and techniques used by authors to create various effects in the reader. It also can increase our understanding of humorous phenomena in general as it enables us to distinguish various aspects of humour and unwind its complexities so that they can be addressed and examined in an appropriate way.

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The Correlation Hypothesis revisited

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Abstract

The paper discusses motivation for metaphorical correspondences on the basis of the correlation of concepts, with special focus on conceptual blends. More specifically, it is centered around metaphorical meaning and possibilities that are offered by conceptual blends as tools for interpretation. A key part concerns the idea of the correlation hypothesis (Libura 2000) and its contribution to meaning creation. Providing an account of context-dependent (children's animated films) meaning-construction, the research question assumes that the hypothesis of correlation serves as a useful tool for motivating, organizing and analyzing conceptual blends.

Keywords

metaphors, conceptual blends, the correlation hypothesis, animated films

Jeszcze raz o hipotezie korelacji

Abstrakt

Artykuł traktuje o podstawach i motywacji, które decydują o określonych metaforycznych relacjach, a które tworzone są na podstawie korelacji pomiędzy wybranymi konceptami. Szczególna uwaga po-

święcona jest amalgamatom pojęciowym, które wykorzystane są jako narzędzie w interpretacji znaczenia metaforycznego. Kluczowa część artykułu dotyczy hipotezy korelacji zaproponowanej przez Liburę (2000) oraz wpływu tej hipotezy na tworzenie i interpretację znaczenia, a w szczególności metafor. Biorąc pod uwagę tworzenie znaczenia zależnego od kontekstu, jak dzieje się to w przypadku filmów animowanych, teza artykułu zakłada, że zgodnie z hipotezą korelacji określone współzależności znaczeniowe tworzone są już na poziomie przed-wyobrażeniowym, a powstałe w tym procesie korelacje służą jako narzędzie do motywacji, organizacji i analizy amalgamatów pojęciowych.

Słowa kluczowe

metafory, amalgamaty pojęciowe, hipoteza korelacji, filmy animowane

1. Introduction

In the modern world of omnipresent technology and mass media, language users are, to a certain extent, forced to process information and meaning in the shortest time possible. The consequence of such expectations and attitudes is that the very form of information must fulfill particular conditions. What follows is that language users function in a specific moderated context whose most characteristic feature is multi-modality, enhanced by a number of language phenomena, metaphors being one of them. Yet, the goal of this article does not concern the communication issues but it focuses on the motivation for metaphorical correspondences on the basis of the correlation of concepts, with special focus on conceptual blends (Fauconnier and Turner 2003).

The discussion starts with the introduction of conceptual metaphors and it proceeds to the presentation of conceptual blends. A key part is centered around the idea of the correlation hypothesis (Libura 2000) and its contribution to meaning creation. Providing an account of context-dependent

(children's animated films) meaning-construction, the research question assumes that the hypothesis of correlation serves as a useful tool for motivating, organizing and analyzing conceptual blends.

2.   Theoretical background

2.1. Metaphors

Given that the discussion of metaphorical conceptualization and metaphorical meaning has generated heated debate since the time of Aristotle, for the sake of the present discussion the scope of the theoretical background, as far as metaphors are concerned, has been limited to a few positions that are most relevant to the research question of the paper.

2.1.1. Lakoff and Johnson

Lakoff and Johnson's work, *Metaphors We Live By* (first published in 1980 with its later edition in 2003 and whose ideas were later supplemented and modified by Lakoff 1987, 1990, 1993, Lakoff and Turner 1989, Johnson 1987) is a monumental work presenting a cognitive semantics approach that has altered the idea of metaphorical meaning. Specifically, these two linguists have managed to prove that metaphors are not language deviations reserved only for literary use but are rather metaphorical expressions that have their motivation in conceptual organization and the structuring of everyday thoughts and ideas. They argue that metaphors are of a conceptual character and, in their conceptual structures, are in principle based on "understanding one concept in terms of another" (Lakoff and Johnson 2003: 5), since this understanding is present in everyday language production and comprehension. However, this understanding is not always the same, i.e., it depends on the kind of experience and mental construals that are activated (e.g. ORIENTATIONAL metaphors that are based on human experience with spatial orientation,

ONTOLOGICAL metaphors that allow for understanding abstract ideas as non-abstract ones, or STRUCTURAL metaphors where "one concept is metaphorically structured in terms of another" (Lakoff and Johnson 2003:14) by means of the metaphorical mapping between a source and a target domain). Lakoff and Turner (1989) supplement the above division of metaphors by adding another group of them, namely IMAGE metaphors, whose status in the human cognitive system has not been defined (i.e. they are new and because of this fact they are not conventional). According to the authors, these metaphors occur more often in poetry or prose than in everyday language.

Apart from a number of disagreements about their definitions of metaphors, Lakoff and Johnson's approach has invited comments and discussion from numerous viewpoints and at multiple levels of analysis, and ultimately allows for the recognition of a systematic organization of the conceptual system of language based on sets of conceptual metaphors.

2.1.2. Kalisz

One of such viewpoints is presented by Kalisz (2001) who attempts to solve the problem of classification of conceptual metaphors. He suggests the following parameters for a particular class of metaphors:

(a) novelty,
(b) entrenchment of metaphor in a person's cognitive system,
(c) productivity,
(d) intensity,

where productivity and entrenchment are the opposite of novelty and intensity (i.e. if a metaphor is novel, it is intensive in a conceptual system; if a metaphor is entrenched/ conventionalized, it is productive). Furthermore, he introduces a spectrum of metaphors (Kalisz 2001: 113), where each kind

of metaphor is a variant resulting from the degree of fulfillment of the above criteria:

ontological   structural   image   novel   metaphorical
                process

The last position in the spectrum is occupied by "a metaphorical process" which Kalisz (2001) defines in terms of the meaning and status of a given expression whose metaphorical specification is still in progress and whose status as a metaphor has not yet been constituted.

The above-mentioned criteria, as well as the organization of groups of metaphors in the form of a continuum, are obviously dependent on individual cognitive models that preclude a clear-cut distinction between kinds of metaphors.

2.1.3. Charteris-Black

At the beginning of his *Corpus Approaches to Critical Metaphor Analysis* (2004), Charteris-Black claims that metaphor is not only limited to language and concepts but is closely related to "a transaction between contexts" (Ricoeur 1978, quoted after Charteris-Black 2004: 2). These transactions are complemented with his corpus analyses, which allow for metaphors to obtain a pragmatic dimension. Thus, metaphor being a cognitive, linguistic as well as pragmatic phenomenon constitutes a category, which frequently explains or guides the lexical choices of language users. What is most significant is that these "linguistic choices realize particular rhetorical intentions within a particular context" (Charteris-Black 2004: 8), which strengthens the position of metaphors as useful and easily applicable pragmatic tools (e.g. for persuasion or manipulation). To support his view, Charteris-Black (2004: 12) states that

> Analysis of metaphor is often, then, an exploration of the inner subjectivity of speakers- what it is that is unique to their perception of the world-and forms the basis for their response to particular situations and to particular ideas.

What follows from the above quotation is that what counts in metaphor can be divided into its conceptual background (this inner subjectivity), on the one hand, and its motivation/use (the response) that allows for interpretation by users of language, on the other hand. While it could therefore lead the present discussion to the dilemma of "what is said" versus "what is meant/intended" (discussed, among others, by Sadock 1979, Searle 1979, Levinson 1983), this problem need not be addressed here, since the thrust of the present discussion is to examine key issues more generally connected with pragmatic aspects of metaphors. Yet, Charteris-Black (2004: 13) complements this approach by noting that pragmatics investigates "the contexts in which metaphors occur and the evidence that these contexts provide of speakers' intentions in using metaphors".

The above discussion illustrates that the phenomenon of metaphors goes far beyond the relationship between a source domain and a target domain. A significant factor that influences the form and interpretation of metaphorical meaning is strictly linked to contextual conditions and communicative intentions that particular metaphors are expected to fulfill.

2.2. **Conceptual blends**

Since its introduction, the theory of conceptual blending (Fauconnier and Turner 2003) has attracted considerable attention from scientists in different fields, beginning, obviously, with cognitive studies (with priority given to linguistics), but also including such disciplines as literary studies or even theatrical studies (Limon 2010).

One of the most basic concepts connected with this theory relates to the idea of mental spaces, since they are a major tool by means of which certain cognitive operations are performed. As Radden and Dirven (2007: 202) define them, mental spaces are representations of a situation in the speaker's and hearer's minds. Thus, such representations are reflections of one's knowledge, experience and cultural background as well as a part of the cognitive apparatus which plays an active role in linguistic competence and linguistic performance.

Generally, conceptual blending theory involves the creation of a separate structure/construal (blend) from a number of mental spaces which, in a dynamic way, allow for the reading of meaning. Fauconnier and Turner (2003) highlight that the blended space is the result of the exploitation of counterpart connections between inputs; however, not all counterparts have to be fused in the blend. The two linguists propose a schematic representation of the blending process (see Figure 1).

The emergent structure, which is the space where a new meaning is construed, partially inherits structures from input spaces while the blended space constitutes the site for central cognitive work.

In the process of blending one can distinguish composition, completion and elaboration (Fauconnier and Turner 2003: 47-48) as fundamental operations that organize the construal meaning. As Fauconnier and Turner (2003) point out, composition links elements from the input spaces in order to form relationships absent in the separate inputs. This means that "counterpart elements can be composed by being included separately" (Fauconnier and Turner 2003: 48) in the blended space or "are being projected onto the same element in the blend" (Fauconnier and Turner 2003: 48); this kind of projection is called "fusion" (Fauconnier and Turner 2003: 48). Completion, as another operation, recruits background knowledge and meaning patterns to a great extent in order to obtain a complete conceptual form. The result is that parts of a familiar frame are used in the blend where "a minimal

composition is often automatically interpreted as being a rich-
er pattern" (Fauconnier and Turner 2003: 48). The third
procedure, elaboration, allows us to treat conceptual blends as
simulations that can be analyzed and understood in an
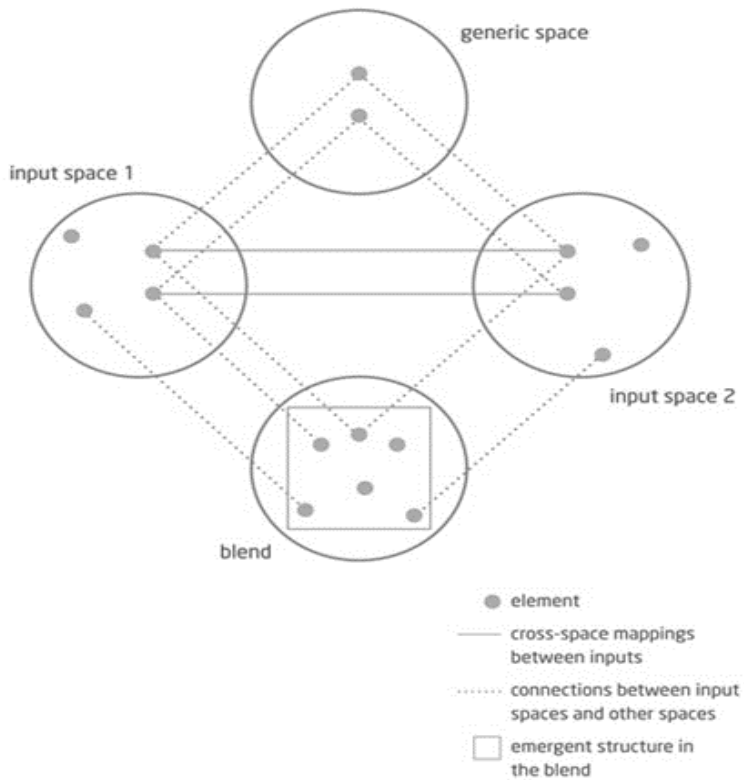imaginative way, yet still follow the principles established for
the blend.

Figure 1
The blending process (Fauconnier and Turner 2003: 46)

Moreover, the operations mentioned above give rise to a structure "that is not copied from the inputs" (Fauconnier and Turner 2003: 49) and this emergent structure (like any structure in the blend) can be modified at any moment. However, these conceptual operations constantly recruit mappings and frames that are entrenched in the conceptual system of language users.

The theory of blending can be treated as an alternative/complementary method to the theory of a conceptual metaphor as far as the analysis of indirect meaning is concerned. That is, in a conceptual metaphor (Kövecses 2005, Turner 1987, Lakoff and Johnson 2003 and others) the mapping involves two conceptual domains, one of which requires the complementation of its conceptual structure (a target domain) while the other provides this lacking conceptual structure (a source domain). In fact, Lakoff and Johnson (2003) claim that metaphors are omnipresent in everyday life and their role in human conceptualization as well as understanding seems unquestionable. Yet, in the further part of this article I shall demonstrate that this mapping involves a rather limited number of conceptual structures, and for more complex and intricate meanings conceptual blends seem to offer a more effective analytical tool. Additionally, I shall show how the correlation hypothesis works in conceptual blending and how it is realized in children's animated films.

2.3. The Correlation Hypothesis

The lexical choices that form a metaphor are not stipulated by communicative intentions only, but since these choices follow conceptual processing, it is worth taking a closer look at the conceptual processes involved in creating metaphors. One of the major issues focused on here is that of the Correlation Hypothesis that assumes:

> [...] the majority of metaphors which provide the structure for everyday expressions have as their source various kinds of pre-

metaphorical relationships across conceptual domains; these cor-
relations motivate the creation of a metaphor since the inherent
structure of the target domain limits the choice and form of the
source domain.

(Libura 2000: 257, translation mine)

As the above quotation presents, the metaphorical mapping is
conditioned by the target domain which dictates the choice of
the source domain. This selection is limited by the structure of
the target domain which seeks concepts and lexical correlates
in the corresponding source domain to fill the semantic gap
and to meet certain communicative intentions.

Thus, according to Libura (2000), metaphors have their
motivation in the pre-metaphorical relations across various
conceptual domains (it can be called motivation for meta-
phorical correspondence). Consequently, metaphor is part of
the process of meaning formation that begins even before fully
developed concepts are formed in the human conceptual
system. Yet, it is worth highlighting that the pre-metaphorical
relations may be of a conceptual or pre-conceptual character.

In her work, Libura (2000: 60) claims that language is
saturated with structures related to pre-language experience
connected with body and physical activities. A similar view is
expressed by Johnson (1992: 347) who claims that "the way
things can be meaningfully understood depends, to a large
extent, on the kinds of bodies we have and the ways we
interact with our physical and social environment". As Gibbs
and Colston (1995: 363) point out, we possess an ability to
appreciate resemblances between relatively abstract properties
of visual and auditory experiences, which has its results in the
emergence of various image structures.

However, Johnson (1992) explains that the conceptual
system is significantly dependent on image-schemas and the
structure of a given type of image-schemas consists of not only
spatial features but also of abstract ones. Further, he
(Johnson 1992) highlights that all features co-create the
structure of image schemas. Moreover, metaphorical mapping

preserves the structure of image schemas. Yet, as Libura (2000) points out the question arises if all features of all beings can be represented by means of image schemas.

Above all, Libura (2000: 103) concentrates on the issue of lexical correlates of an image schema. She defines image schemata as lexemes which are closely connected with a particular schema relating (in a direct or metaphorical way) to an experience that constitutes it. Additionally, some lexemes can be lexical correlates for more than one schema, especially if for the meaning of these words more than one of image schemas is necessary.

Nevertheless, the linguist also highlights that "some abstract notions are grasped not only by the metaphors but also have their own (probably insufficient) inherent structure" (Libura 2000: 272, translation mine). Furthermore, she points out that even such abstract conceptual categories as time or causation possess an internal organization (although relatively simple) that matches more precise image schemata. As a result, this match facilitates metaphorical mapping across particular conceptual domains but, as Libura underlines, only for those metaphors which are the most often used and are a conventionalized part of the lexicon. This aspect also illustrates that the hypothesis is not universal and that the actual metaphorical mapping is conditioned by the level of abstract thinking, that is to say, metaphorical mapping is only possible when abstract thinking is well developed.

Although the above discussed theoretical assumption connected with correlations at the pre-metaphorical level covers mostly instances that are commonly recognized, used and interpreted by speakers of a given language, it is a useful tool for moderated contexts (the ones that are not genuine language performance but are modelled on such language use, thus they are directed and planned).

3.   A case study

3.1. About *Cars*

Cars is a Pixar and Disney co-production that presents a story about a racing car named Lightning McQueen and his adventures in a small American town, Radiator Springs, near Route 66 in Carburetor County. Other characters (which are all cars) that play a crucial role in the development of the story are (to name only a few): Tow Mater (a local hauler), Sally (a local lawyer who moved from LA), Hudson Hornet-Doc Hudson (a local judge and a former racing legend), Sheriff (a member of the local law enforcement), Luigi (a local owner of a tire shop) and Guido. Thus the audience is presented with a spectrum of representative inhabitants of a southwestern American town that used to be a famous place but now is forgotten and deteriorated. All of these elements form a platform for a moderated context which combines a number of sensual and conceptual levels, giving it the character of a multi-modal phenomenon.

3.2. The conceptual structure in *Cars*

Following Redzimska (2013: 71), the conceptual structure of this animated film can be represented by a complex conceptual blend where the most developed space is the generic space (Figure 2).
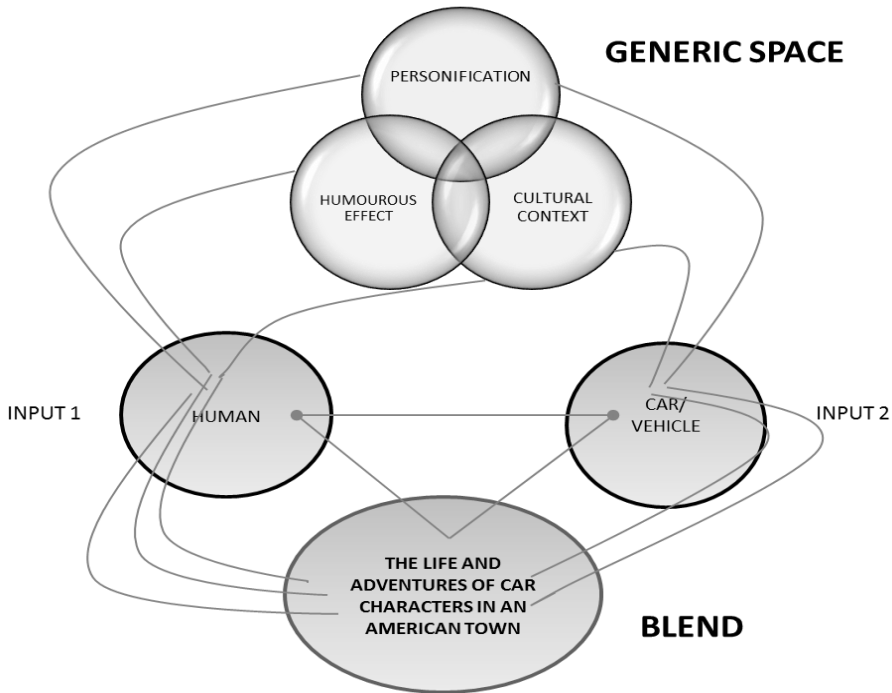
Figure 2
The generic space for *Cars* (Redzimska 2013: 71)

Redzimska (2013) points out that the Multi-Space Model of the generic space superimposes the conceptual background of the plot on the conceptual blend that results from it (which also underlies the multi-modal dimension of the film). Additionally, this generic space serves as a reference point for the conceptual frames of meaning present in the above-mentioned blend.

A closer examination of the above blend reveals that conceptual blends can serve as a basis for forming multi-modal metaphors, since each conceptual domain/mental space (input as well as generic and a blend) provides a mode which can be later developed and supplemented, not only conceptually/semantically but also as required by the production process of the film (the modes include a visual representation or music, among others). This argument works also in favour

of one of the assumptions for the present paper that conceptual blends give more possibilities for analyzing metaphorical meaning in relation to conceptual metaphors because they reveal levels of conceptualization absent in the source-domain approach to metaphor.

3.3. Conceptual blends and the Correlation Hypothesis

The main objective of the paper is to demonstrate that the Correlation Hypothesis can be applied as an analytical tool for conceptual blends. Pre-metaphorical relationships across conceptual domains and their language correlations (which is in accordance with the Correlation Hypothesis) motivate semantic processes that further constitute conceptual blends. These pre-metaphorical relationships are particularly visible (but not only) in the generic space because their function is similar to that of the generic space. In other words, they provide certain elementary conceptual frames which then form a bigger conceptual structure – a generic space. Moreover, as Libura (2000) stresses, these pre-metaphorical relationships subsequently make use of image schemata as a source of their conceptual structures. Thus, the claim is that all of the above-mentioned aspects can be applied to the conceptual blends.

   As far as the conceptual blend for *Cars* (presented in Figure 2) is concerned, there are a number of pre-metaphorical relationships across conceptual domains. The most obvious ones are present in the process of personification (or to be more precise, anthropomorphization) as a common practice for literary works or films. Thus, the fact that car characters (one mental space) behave and speak like human beings (another mental space) is conditioned by the conceptual structure of the first mental space which is chosen and limited by the inherent structure of another mental space (prototypically these characters represent characteristics that are closely connected and deeply entrenched in the conceptual system; thus the characteristic features have the status of the most basic pre-metaphorical concepts). Consequently, the lexical represent-

ations based on metaphors make use of pre-metaphorical relationships across conceptual mental spaces.

In the case of the car characters, these pre-metaphorical relationships can also be exemplified by the concepts their names represent. A prime example is the major character Lightning McQueen, a red sports car famous for his achievements in speed racing. Names occupy a special place in a semantic theory. As Cruse (2000: 315-318) states, they have no meaning (so they have extensions but not intentions) or they represent abbreviated descriptions. For the sake of the present discussion, the latter understanding of names is the relevant one. Clearly, in such art productions as animated films, the assumption is that these names will be easily recognized and associated with a given movie character (from a pragmatic point of view it is similar to a perlocutionary effect (Austin 1962), where what is said has certain psychological consequences; one of them is the intention to impress or connect with the audience).

Moreover, in the conceptual background of the name (understood as abbreviated description) for Lightning McQueen there are a number of pre-metaphorical relationships, which means that before the personification mapping between a human domain and a vehicle domain, the focus is on a number of attributes that characterize the concept of lightning. These attributes form a certain image and understanding of lightning; thus to a certain extent they support Lakoff's (1990) claim that human reasoning is image-based.
The concepts of lightning can be defined, among others, by a number of pre-metaphorical image schemas, which can include:

- elaborations of force (the image schema described by Johnson 1987): which in the case of this film character can be interpreted as the physical force that is produced during a lightning strike or as the mechanical power of the engine of Lightning McQueen;

- attraction (the image schema described by Libura 2000: 167): in the case of a lightning strike, characterized by brief intermittent force (until the electrical charge has been discharged); as far as Lightning McQueen is concerned this can be metaphorically understood as a feature of a character (that attracts with great force but for a short period of time, and in an intermittent way);
- counterforce (the image schema described by Libura 2000: 173): this image schema assumes that if there is some force used, there is always a counterforce that responds to it; again, in the case of the major character of the film in question it can be metaphorically interpreted as a number of actions (counterforces) that were undertaken (provoked) in response to Lightning McQueen's deeds;
- contact (the image schema described by Lakoff 1987) which when applied to a lightning strike as a physical phenomenon refers to the fact that the electrical charge excited during a strike usually goes down towards the ground so that it hits it; the character of Lightning McQueen makes this phenomenon visible since as a sports car it slows down dramatically when it contacts an obstacle (like a lightning bolt that discharges when it hits the ground).

As the above analysis illustrates, the image schemata used in the pre-metaphorical formulation of the major character are some of the prototypical features (widely recognized) of lightning and they work as motivation for metaphorical correspondences. In the process of personification they acquire metaphorical meaning that defines the features of a human character but, at the same time, such construal of a major character that is based on this kind of pre-metaphorical relationship functions effectively for the audience toward whom a given artistic creation is directed. Thus, as it has been demonstrated above, the correlation hypothesis has its application in the creation of conceptual blends. This hypothesis ultimately explains why particular pre-conceptual image schemata are successfully used in the creation of characters in animated films for children.

4. Conclusions

The paper accounts for the role of the correlation hypothesis in conceptual blends with reference to metaphoric relationships represented by these blends. The research question assumes that pre-metaphorical image schemata motivate metaphorical correspondences and condition the construal of conventional conceptual metaphors. Additionally, the thesis also assumes that such pre-metaphorical correlations can be purposefully used in moderated contexts such as animated films for children. The theoretical background provides insight into the theory of metaphor in connection to selected aspects, pragmatic grounds for metaphors and conceptual blends, as well as the hypothesis in question. The data analyzed in the article come from the animated film for children entitled *Cars* 1.

Thus, it can be concluded that the correlation hypothesis has great explanatory potential for the phenomenon of conceptual blends, which are useful for explaining metaphorical meaning in a moderated context. This potential has been revealed in the facilitation of the conceptual process as well as in the reading of the conceptual/metaphoric structure. Moreover, as illustrated in the case of the film, the application of particular image schemas in metaphorical realizations of concepts undoubtedly enhances this effect.

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LANGUAGE ACQUISITION

Intercultural and global dimension of textbooks – points of consideration for language teachers

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Abstract

As foreign language acquisition is potentially connected with shaping intercultural and global competences, this paper focuses on textbooks used for learning English to critically reflect on their diversity-related contents. The conceptual frame of the research is based on specific aspects of intercultural and global education, connections between them, and learning English and the hidden curriculum. The qualitative study of textbook analysis content allowed the authors to identify main themes related to ethnic diversity, including petrification with exotization, and povertization. Thus, the findings of the study highlight the limitations in fostering intercultural and global values in the analysed material and stress both the need for critical approach in classroom practice and further study in this area with the use of a theoretical framework suggested by the authors.

Keywords

language learning, intercultural education, global dimension, textbooks

Międzykulturowy i globalny wymiar podręczników – kwestie do refleksji dla osób uczących języka angielskiego

Abstrakt

Biorąc pod uwagę, iż nauka języka obcego jest potencjalnie związana z kształtowaniem kompetencji globalnych i międzykulturowych, celem niniejszego artykułu jest krytyczna analiza treści związanych z różnorodnością kulturową zawartych w podręcznikach używanych do nauki języka angielskiego. Rama teoretyczna analizy jest oparta na wybranych aspektach programu ukrytego, edukacji globalnej i międzykulturowej oraz związkach między nimi a nauką języka angielskiego. Jakościowe badanie treści podręczników pozwoliło autorkom zidentyfikować główne tematy związane z różnorodnością etniczną, określone jako *petrification* (petryfikacja), *exotization* (egzotyzacja) oraz *povertization* (ukazywanie osób i grup przez pryzmat ubóstwa). Wnioski płynące z analizy dotyczą ograniczonego zakresu promowania wartości globalnych i międzykulturowych w badanym materiale, a także konieczności krytycznego podejścia w stosowaniu materiału dydaktycznych w praktyce edukacyjnej oraz potrzebę dalszych badań w tym zakresie z zastosowaniem ramy teoretycznej zaproponowanej w niniejszym tekście.

Słowa kluczowe

nauka języka obcego, edukacja międzykulturowa, wymiar globalny, podręczniki

1. Introduction

Foreign language acquisition has the natural potential to shape intercultural competencies, resulting primarily from the socio-cultural construction of a language (Byram 2013; Byram and Fleming 1998; Chamberlin-Quinlisk and Senyshyn 2012; Savva 2017). Various authors connecting intercultural issues with language learning emphasize cultural aspects of every act of communication and immersion of language in culture (Crozet and Liddicoat 1997; Hatoss 2004; Liddicoat 2005; Kramsch

1993, 1998), which is expressed in Byram's remark that "One of the contributions of foreign language teaching to pupils' education is to introduce learners to and help them understand 'otherness'" (1989: 25). During foreign language learning, getting acquainted with this "otherness" is usually connected with the groups whose language is taught (e.g. the French, the Americans or the English). Rarely is it considered that foreign language acquisition provides various opportunities to get in touch with cultures other than the ones directly related to the target language.

Acknowledging the potential intercultural importance of learning languages, this paper critically analyzes the depiction of particular groups of non-European origin in the chosen sample of textbooks used in teaching English in Poland. The choice of textbooks as the subject of the analysis results from the fact that whatever subject they serve, they are still an inevitable part of formal education, carrying and embedding the set of norms and values preferred in a given society (Apple and Christian-Smith 1991; Chomczyńska-Rubacha 2011; Meighan 1993; Pingel 2010; Stawowy 1995; Schissler 1989-1990; Woodward 1994). Therefore, the findings of this paper can inform the practice of language teachers as they approach the presentation of culture related content within texts.

First, the conceptual framework and the research questions guiding the analysis will be presented. This part will be followed by the methodology, findings, and conclusions.

2. Conceptual framework and the research question

The conceptual framework of the paper integrates the concepts of intercultural and global education in relation to foreign language teaching and hidden curriculum-related issues.

Intercultural education, defined as a means of fostering intercultural competencies, has a transformative and emancipatory character in which learners form the ability to question their own ethnocentric attitudes, valuing cultural diversity and equality (Bennett 1993; Brander 1995; Byram 1997; Huber et

al. 2014; Grzybowski 2008; Jackson 2008; Nikitorowicz 2007; Powell and Powell 2010). "Equality" within intercultural education is related to "getting rid of domination and *privilege of normality*, i.e. assuming that our own system of values and ways of thinking is obvious, self-evident and non-discussable" (Szkudlarek 2003: 23). Contesting and critically reflecting upon one's own point of view and position in social structures can be both inspiring and challenging within educational settings (Brookfield 2017). The concept of intercultural education is tightly connected with areas of global education which "is an active learning process based on the universal values of tolerance, solidarity, equality, justice, inclusion, co-operation and non-violence" (*Global Education Guide* 2009: 3). Global education, among different objectives, is aimed at making learners understand complex diversity of today's world, where different groups are interconnected and interrelated and where critical skills, including the ability to recognize stereotypes and prejudices, help learners appreciate this diversity (da Silva 2010: 23-24).

The need for intercultural and global dimensions in education is included in the main documents from the Polish Ministry of Education regulating the functioning of schools in Poland, which oblige schools to teach "openness to values of European and world cultures, […] solidarity, democracy, justice and freedom" (*Ustawa o systemie oświaty* 1991: 1), support "friendship among people of different nations, races and opinions" (*Karta Nauczyciela* 1982: 5), shape respect for other cultures and traditions, and take necessary steps to prevent any discrimination (*Podstawa programowa z komentarzami* 2008: 3; *Podstawa programowa* 2012: 75).

Hatoss emphasizes that intercultural learning during language acquisition should avoid an ethnocentric approach and the promotion of stereotypes (2004). She suggests a checklist for examining cultural contents in language textbooks with questions related to whether the textbooks refer only to "surface culture (e.g. food, dressing, and other visible elements of culture)" or also "deep culture (orientations, values, non-visible

and non-tangible elements of culture)" and whether they represent culture as "monolithic" or "dynamic", and cater for "the atypical and individual" (2004: 32). The question of textbooks' intercultural contents also has been discussed in UNESCO documents referencing "a lack of diversity" and criticism of some textbooks "for stereotypical, simplistic interpretations of ethnic, cultural, religious and linguistic minorities" (*Policy paper* 28: 9). Similarly, the guidelines on global education, particularly the ones focusing on presenting the global South, emphasize the need of avoiding stereotypes and presenting this region against a broad context as culturally, socially and politically diverse (Gontarska et al. 2015).

Finally, lenses of a hidden curriculum, defined as "unintended outcomes of the schooling process" (McLaren 2009: 75) inform the conceptual framework for analysis. According to different authors, the concept of hidden curriculum is a tool of highlighting and deconstructing these elements of the educational system that contribute to perpetuating stereotypes and petrifying social inequalities (Bourdieu and Passeron 1990; Chomczyńska-Rubacha and Pankowska 2011; Janowski 1989; McLaren 2009; Meighan 1993). Connecting the issue of a hidden curriculum and textbooks, Meighan described a classroom as the place "haunted" by the ghosts of the textbooks' authors with all their infirmities and prejudices (1993: 75-76). For an American context, it might be useful to mention here Banks and Banks, who in relation to American reality, stated that "historically, textbooks were written by members of powerful mainstream groups. In the United States, they have been written primarily by white, Protestant, middle- or upper-class men" (2013: 2061). In Poland, authors of one of the most comprehensive studies so far related to textbooks (designed for Polish, History, Knowledge of Society, Preparation for Family Life) conclude that texts insufficiently represent contemporary diversity, promote a Europocentric approach, and lack issues facilitating the debate on stereotypes, prejudices, and discrimination (Pawlęga and Chustecka 2011; Jonczy-Adamska 2011). Authors of other publications, focusing on the analysis of glob-

al education elements in textbooks, point out the global South often is presented in a stereotypical and simplified way, in which poverty, wildness and traditionalism are the most distinctive features of this part of the world (Kielak et al. 2016; Popow 2015).

Relying on the chosen aspects of intercultural and global education and their connections with learning English, there were two main research questions that guided this examination: 1) What image of groups of non-European origin is depicted in the chosen sample of textbooks used by English teachers and learners in Poland, 2) In what ways, if at all, does this image contribute to values of intercultural and global education? Finally, conducting the analysis was aimed at raising language teachers' awareness of potentially stereotypical and simplified depiction of these groups on the pages of educational materials.

3. Methodology

The educational material examined in the present research consists of English textbooks used in Polish upper secondary schools.[1] Eight out of nine examined textbooks were published by UK-based publishing houses. The choice of particular textbooks (see bibliography for details) was based on their popularity in the biggest internet shops representing publishing houses in Poland. This choice was confirmed by 3 interviews with Polish teachers of senior secondary schools. Six textbooks represented a pre-intermediate level designed to prepare for the Matura examination, the final comprehensive examination for senior secondary school, on a basic level and three represented an intermediate level for preparation for the advanced Matura level.

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[1] These schools are attended by about 80% of young people after junior secondary school (Vulcan 2017; GUS 2015) and they finish with the Matura exam that can be taken at basic level (chosen by 92% of students) and advanced level (chosen by 51% of students) (CKE 2017). Thus, the chosen books are not only aimed at teaching the language, but they are also a commonly used tool preparing for Matura examination.

The analysis is a qualitative study based on an interpretive research approach with a central importance on the meaning-making process (Bhattacharya 2008; Sławecki 2012). In the research, the focus was given to the textbook depiction of the groups identified as of non-European origin and considered to be native inhabitants of Africa, Asia, Australia, New Zealand, other Pacific islands, the Caribbean, North and South America (all these groups will be referred to as *target groups*). The units of the analysis were parts of the books understood as a logical unity: a piece of article, a poem or a dialogue in case of texts. The chosen texts were subject to content analysis with a coding process that allowed the authors to identify recurring patterns and defining final themes that emerged from the research (Babbie 2003; Gibbs 2007; Kubinowski 2010; Lichtman 2006).

4. Findings

(Note: Quotations from the textbooks are followed by the number of the textbook they come from and relevant pages. The numbers assigned to each textbook are placed in the end of the text).

In all the analyzed textbooks, the target groups coming from the regions listed below were identified – the numbers in the brackets stand for the number of texts in which the representatives of the given location were present: Africa (11), Asia (23), Australia, New Zealand and Pacific islands (11), the Caribbean (5), North and South America (6). The common patterns that emerged from the analysis were classified by the authors in two interrelated themes defined as petrification with exotization and povertization of ethnicity. Before the detailed explanation of these two themes, descriptive data is depicted in Table 1, which show the prevalence of these images in depicting the target groups.

Table 1

Number of target groups classified within the categories

Region with the number of references to the target groups	Number of target groups classified within the category: *petrification with exotization*	Number of target groups classified within the category: *povertization*
Africa (11)	7	4
Australia, New Zealand and other Pacific Islands (11)	11	—
Asia (23)*	22	—
the Caribbean (5)	5	—
North and South America (6)	6	—

* In one case the target group (Chinese) did not fall into any category being mentioned as the group on which experiments were confirmed (3, 39).

The results show that the dominating image of target groups is related to presenting them through their past and traditional lifestyle with a few references to poverty these groups experience. At the same time, the image that could counterbalance this type of depiction is practically non-existent on the pages of the chosen textbooks.

4.1. Petrification with exotization of target groups

Petrification, taking place when diverse–groups are presented through their past, and exotization, as referring to their very traditional habits that are highlighted, are interconnected issues. Because of the integrated nature, the concepts were identified as one theme.

   As for presenting some groups in reference to their past, in some cases (Aborigines, Egyptians, Eskimos, Maoris, native North Americans) the past is actually the only way people appear on textbook pages. In other cases, e.g. Indians or Jamai-

cans, a historical context constitutes their image to a substantial degree. The association of the group with the past is created either by adding the relevant adjective (e.g. "Ancient Egyptians" and "Ancient Eskimos", 3,131) or connecting the description with a colonial context (e.g. presentation of Maori people as the ones who in 1840 "accepted British rule", 8, 63 or Hawaiians as guilty of killing Captain Cook in 1779, 6, 118). These past references are frequently related to superficial and practical aspects of life, not deeper cultural achievements or values these groups might have created, e.g.: "The Aztecs and Incas ate a lot of cereals, beans and fruit and not much meat at all" (1, 59), "Europeans learned to use the sweet sap of the sugar maple tree from Canadian Indians […]. Many of the first settlers were fur traders who bought beaver skins from native hunters" (6, 192). Moreover, the image of target groups is very simplified and stereotyped, like the one concerning the first inhabitants of Jamaica, "peaceful tribes of Taino and Arawak" who "lived in huts, slept in hammocks, and caught fish with simple stone-tipped spears" (8, 132) or the native North Americans, "a peace-loving people who enjoyed a simple life, […] farmed the land, fished, and hunted wild animals" (8, 132). In fact, an equally stereotyped picture is presented in reference to the present: Jamaicans "take great pleasure in debating" (7, 253) while "Indians are demanding in terms of eating etiquette" (7, 256). Although such cliched phrases also refer to other groups, including the ones of European origin, they are, in European cases, always counterbalanced by numerous diverse representations.

This petrified and exotic image of ethnicity lacks references to the processes of development and transformation the target groups have undergone. This alleged unchanged lifestyle, similarly as it takes place in case of presenting the past, refers to superficial elements of culture, usually appearance, eating habits or accommodation to quote just a few examples:

Traditional customs, like tattooing, head-shaving, piercing or other kinds of body modification can express status, identity or be-

liefs. In Borneo, for instance, tattoos are like a diary because they are written record of all important events and places a man has experienced in his life. For New Zealand's Maoris they reflect the person's position in society. In western society, where tattoos used to be considered a sign of rebellion, the culture is changing and they are now a very popular form of body art (4, 4).

While travelling, Gordon has found out that people in most parts of the world eat in sects. Only the cultures of Europe are exceptions. People in the Middle East dine on locust […], Africans and South Americans collect ants and termites for food […] Cambodians eat "deep-fry spiders" (7, 208).

Many Brazilians living along the mighty Amazon river live in stilt houses, as they know that it is the only way to prevent their homes from being destroyed by water when the Amazon floods. […] In the mountainous Hunan Province in China, the Han, Tujia, Miao, Hui, Dong and Zhuang peoples have managed to inhabit the steep mountains by building stilt houses (8, 18).

The first of the above quotations refers to appearance. In general, ideals of beauty within Europe are depicted as continuously changing while permanently stuck in other parts of the world. This message is strengthened by the illustrations in which target groups are always presented with very traditional face painting, jewellery or masks while European representations vary from the images of Rubens ideal, through Elizabethan England, Coco Chanel to Beckhams (4, 4; 3, 106).

Finally, the groups of non-European origin are frequently shown in the context of holidays or events they celebrate, like Indians and a Kite Festival (7, 264), a New Zealand rugby team performing "the *Haka*, an intimidating Maori Warrior dance" (8, 63), Chinese celebrating New Year (7, 165) or Jewish people during Hanukkah (7, 165).

Although the analysis did not include the target groups living outside their native regions, it is worth noticing (and maybe for future analysis), that many of them were presented as belonging to minorities, as in the description of modern Britain

where "The largest minority groups are Indian, Pakistani, Black African, Black Caribbean and Chinese" (6, 92) or the USA whose "population consists of almost 80% people of European origin […], 12.85% African origin, 4.5% Asian" (8,133). Factual as it is, such statements close the given groups within the concept of eternal minority, detached from mainstream groups.

4.2. Povertization of the target groups

Depicting target groups through poverty they experience refers to the groups of African origin, which are associated with hunger, illnesses, poor healthcare and education, lack of water and other basic needs. At the same time, the stories of these people are accompanied by the information about different charities or campaigns, of European, mainly British origin, which bring a solution and relief to the suffering people while native people are grateful, but passive receivers of help. The representative piece of such texts is the one titled *If they hadn't owned a goat...* about Beatrice:

> […] her mother and her seven brothers and sisters lived in a small village in Uganda. They were very poor and basic necessities were a luxury. […] When Beatrice was nine, a life-changing event happened to them. The family was given a goat by a small charity called Heifer International. Within three months of receiving the goat, Beatrice and her family had raised enough money from the sale of the goat's milk to send Beatrice to school. […] Beatrice has many people to thank for their support and encouragement along the way. But most of all, she's grateful to that first goat (4, 96).

Similar stories refer to Mozambique ("one of the poorest countries in Africa" with "two qualities that appealed to them: great potential as a travel destination and local people who desperately needed help") and the NEMA charity that provided the poor area with schools, clean water and built the tourist resort (4, 16-17). The repeating pattern traceable in these texts includes on one side information about the whites who have the

ideas, power, and determination and on the other hand, rela-
tively passive native inhabitants:

> Life in Guludo was hard: there was little clean water and not
> enough food. Healthcare was poor and people in the village had
> a life expectancy of thirty-eight years. Amy and Neal had no quali-
> fications in tourism or healthcare but they had common sense,
> enthusiasm and determination. They talked to the villagers about
> their plan to create a small beach resort which would provide em-
> ployment for people and lift families out of poverty [...]. The couple
> set to work on a beach lodge building beach huts from local mate-
> rials and employing people from the surrounding area [...] they set
> up a charitable foundation (4, 16-17).

The whites, even without experience, seem to have a magical
power to save and change the lives of the ones in need, like
Amy Carter-James: a "small, blue-eyed and blonde" who
"doesn't look like she could change the lives of thousands of
people but, remarkably, she has" (4, 16-17). Similar examples
refer to a story about another charity, Sport Relief, illustrated
by the example of Mohammed Koroma from Sierra Leone men-
tioned as the grateful receiver of help (4, 48-49) or a story of
Asian (no country is given) Buddhist monks who are students
taught by the girl from Great Britain, (2, 32).

5. Conclusions

According to both of the official documents defining the objec-
tives of educational policy in Poland and in Europe (*Ustawa
o systemie oświaty*1991; *Karta Nauczyciela* 1982; *Podstawa
programowa z komentarzami* 2008; Eur-lex 2006) and the
main assumptions of an intercultural and global education
approach to teaching, education should promote openness,
equality, tolerance and shape respect for other cultures and
traditions. Having analyzed the sample of textbooks and their
contents devoted to depiction of the chosen groups of non-
European origin, this study suggests that the examined mate-

rial may not be a strong resource for fostering the values of intercultural and global education.

Presenting target groups through their past history or traditional customs, as cultural curiosity stuck in tribal rituals and lifestyles, only solidifies already existing stereotypes and images of the Other as a stranger. In addition, showing some groups only through the prism of the poverty they experience, does not contribute to intercultural understanding as their immobilization in this poor condition does not open the possibility to perceive them as self-efficient and empowered human beings. At the same time, there is no doubt hunger and poverty are huge problems in developing countries, but limiting their reality only to this issue strengthens the stereotype of helpless citizens whose lives depend on Western world mercy. Although it remains unquestionable that many charities do a necessary job, presenting cultural groups without a broader context that very often is connected with prior Western devastation of resources, gives the impression of the immobilized global South existing thanks to the support of the resourceful and active North. Such a picture is far from reality as it neglects development and modernity that takes place in some countries of the regions mentioned. It is also worth noting that the pages of textbooks are populated mainly by white British or Americans who, contrary to the target group representatives, conduct ordinary lives and perform a variety of activities (shopping, dating, working) or are the representatives of literature, art, politics or science.

Although similar studies have analyzed history and civic education textbooks, this study focuses on English as a foreign language textbooks, which is quite unique particularly in the context of intercultural and global content. If language textbooks are being analyzed, it is usually their usefulness as language teaching tool that is researched, not cultural diversity, ethnicity or other related issues. In the case of Poland and other post-communist countries, the textbook analyses have been concentrated mainly on a gender dimension, whereas the

issues of nationality or ethnicity, especially in reference to language textbooks, are practically absent.

In the presented research, the choice of textbooks was limited to the ones used in secondary schools. Future research could broaden the scope of this exploration to comprise the material used in earlier stages of education. Moreover, the study does not focus on a gender dimension, which would additionally enrich the contents of the analysis.

Findings in this study challenge the belief that teaching English as a foreign language "automatically" fosters intercultural understanding. It is important for educators to sensitize themselves and their learners to be aware of the hidden meaning that often resides from intercultural education objectives. These conclusions might be inspiring for educators, teachers and educational decision-makers to critically reflect and analyse textbook contents in order to complement the books as well as use the texts in a critical way to deconstruct stereotypes and biased opinions they often perpetuate.

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ACADEMIC TEACHING

On the value of general pedagogy practice in teacher education: A proposal of teaching practice tasks

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Abstract

The aim of the present paper is to explore the value of general pedagogy practice in educating pre-service teachers of English. In the first part of the paper, the discussion begins with a brief overview of some key concepts related to the teaching profession, teacher education and teaching practice. The major functions of teaching practice, with specific focus on general pedagogy practice, are examined in the light of the *Regulation by the Minister of Science and Higher Education of 17 January 2012 on Educational Standards in Preparation for the Teaching Profession* (2012). Furthermore, selected models and concepts of organising teaching practice at different Polish teacher training institutions are outlined. The second part of the paper is devoted to presenting an organisational framework of the general pedagogy practice at the Institute of English and American Studies, Gdańsk University. A proposal of a series of teaching practice tasks is put forward along with suggested content of the portfolio documenting trainees' field experience. The paper closes with some recommendations for improving the quality of the university practicum programmes.

Rola praktyki psychologiczno-pedagogicznej
w kształceniu przyszłych nauczycieli języka angielskiego – propozycja zadań praktycznych

Abstrakt

Celem niniejszego artykułu jest przyjrzenie się wartości istocie praktyki psychologiczno-pedagogicznej w kształceniu przyszłych nauczycieli języka angielskiego. W pierwszej części artykułu dyskusja rozpoczyna się krótkim przeglądem wybranych kluczowych pojęć związanych z zawodem nauczyciela, kształceniem nauczycieli oraz praktyką pedagogiczną. Główne funkcje praktyk nauczycielskich, ze szczególnym uwzględnieniem praktyki psychologiczno-pedagogicznej, są przeanalizowane w świetle Rozporządzenia Ministra Nauki i Szkolnictwa Wyższego z dnia 17 stycznia 2012 r. sprawie standardów edukacyjnych w przygotowaniu do zawodu nauczyciela. Ponadto, przedstawiono wybrane modele i koncepcje organizacji praktyki pedagogicznej w różnych polskich instytucjach kształcących nauczycieli. Druga część artykułu poświęcona jest przedstawieniu ram organizacyjnych praktyki psychologiczno-pedagogicznej w Instytucie Anglistyki i Amerykanistyki na Uniwersytecie Gdańskim. Przedstawiono propozycję szeregu zadań związanych z tym typem praktyki oraz sugestie dotyczące zawartości portfolio dokumentującego doświadczenia praktykantów. Artykuł kończy się zaleceniami dotyczącymi poprawy jakości programów praktyk uniwersyteckich.

1. Introduction

With a view to an all-encompassing role of education in human life, teacher education merits special attention from the state and society concerned with the quality of future life (Darling-Hammond 2006). Teacher training institutions are responsible for introducing pre-service teachers' to the teaching profession during their teacher preparation programme and teaching practicum. Their goal is to equip the students – prospective teachers – with the suitable knowledge, skills, behaviors and attitudes to be able to successfully perform their role of teachers and educators at different types of schools. It can, however, be observed that due to the economic, social, educational, cultural, political and technological transform-ations taking place globally and the changing needs of society resulting from them, the proper preparation of trainee teachers [1] for their profession is becoming an increasingly challenging task. Let us look now at some of the imposed demands and obligations with respect to the teaching profes-sion.

In search of the profile of an ideal teacher, educators worldwide have been putting forward their ideas of what professional teaching means. One interesting example of a new understanding of teachers' professionalism is provided by Gołębniak (1998: 160-161), who believes that "readiness for action, reflectivity, romanticism and pragmatism" constitute the essential components. In this view, a professional teacher is perceived as an individual who willingly undergoes or initiates changes in the educational sphere, reflects upon his or her own actions, engages in creating authentic, emotional relations with another human being, and at the same time pursues to find effective solutions to the encountered problems. Teacher professionalism can also be exhibited by a person's

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[1] Trainee teachers are also referred to in the present paper as *trainees*, *trainee teachers*, *teacher trainees*, *student teachers*, *pre-service teachers*, *prospective teachers* and *future teachers*.

wide subject knowledge, skills, qualifications, personal traits and attitudes. As observed by Zawadzka (2004), there has been a noticeable increase in the number and level of requirements related to the teacher's competences and attributes, which emphasises the specificity and increasing public awareness of the importance of the teacher's profession. Currently, teachers are perceived to have a transformative power to affect learners and whole communities and to act as "agents of social change" (Bourn 2016: 1). Not surprisingly, the expectations placed on the teaching profession are exceedingly high, including the promotion of socio-cultural values, innovation, individualisation, autonomy, collaboration as well as interdisciplinarity and interculturalism.

Such a situation implies an urgent need for universities educating future teachers to design high-quality curricula and to prepare trainee teachers to be responsive to the transformed educational contexts. Not only should the curriculum of teacher training institutions be modified and adjusted to the contemporary educational reality, but also the format of teaching practice[2], being central to teacher education (Perry 2004). It, therefore, appears worthwhile re-examining different aspects of the student practicum in order to identify various areas for improvement and suggest ways for raising its effectiveness.

2. Selected teacher-related issues

Before the concept of the teaching practicum is discussed in greater detail, it is worth reviewing only the issues related to the teaching profession which are most relevant for the considerations in the subsequent parts of the paper. It is vital to remember that becoming a teacher is a dynamic and long-

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[2] The period of time spent by a trainee on practising teaching (by observing or conducting classes) and/or engaging in other educational activities that constitutes a requirement in teacher education curriculum will be referred throughout this paper as *teaching practice*, *student/teaching practicum*, *field experience* and *internship*.

lasting process consisting of several developmental stages. In brief, a teaching career starts with the stage of reception, acquisition, exposure to new knowledge and skills and building one's own teaching competence. It is the beginning of shaping one's own teaching identity (Beltman et al. 2015). At a later stage, the trainee undertakes the initiative to develop through a series of trainings during which he or she acquires and then refines the pedagogical and methodological skills. The last stage describes the achievement of high-level teaching skills, ability to critically reflect on one's own actions and to create new suggestions. Trotter (1986), for instance, proposes the following five-stage model of teachers' development:

(1) the novice level (beginner teachers);
(2) the advanced novice level / competent level;
(3) the effective level;
(4) the expert level;
(5) the master level.

Zaborowski (1984) offers a different set of phases in the teacher's professional development:

(1) methodological patterns;
(2) critical reflection;
(3) self-knowledge and self-control;
(4) creativity.

The various suggested stages or phases found in the subject literature share the same feature – they all point to a gradual progression from a person overly reliant on experienced educators' ready-made teaching solutions to a highly profes-sional, autonomous teacher, aware of own potential and ready for innovative educational activities. Undertaking the studies in a teacher training institution and completing the student practicum corresponds to the first phase in the outlined models, the period in which the prospective teacher launches his or her career. The teacher training programme along with

its inherent component of the practicum can then be perceived as a vital starting point for the trainee on the path to mastery.

There exists a rich and well-established literature regarding the set of these desirable personal attributes and dispositions, competences, roles and attitudes of the teacher. For the purpose of the present paper, the characteristics pertaining directly to the contemporary foreign language teacher will be briefly reviewed. Different Polish educators have focused on the issue of the foreign language teacher's profile, for instance Wysocka (2003), Zawadzka (2004), Jodłowiec and Niżegorod-cew (eds. 2007), Aleksandrowska (2015), Andrzejewska and Wawrzyniak-Śliwska (eds. 2017). A large body of literature describes the characteristics of an ideal foreign language teacher. For instance, Allen (1980 cited by Brown 2007: 489) states that the following elements define a good English language teacher:

> competent preparation leading to a degree in English language teaching, a love of the English language, critical thinking, the persistent urge to upgrade oneself, self-subordination, readiness to go the extra mile, cultural adaptability, professional citizenship and a feeling of excitement about one's work.

Then, Brown (2007: 491) offers his own list of characteristics of a good language teacher, which he calls "a synthesis of several unpublished sources", with four categories distinguished, namely: technical knowledge, pedagogical skills, interpersonal skills and personal qualities. The features belonging to the last group include being well-organised, conscientious, dependable, flexible, reflective, inquisitive, ambitious and maintaining high ethical standards.

Apart from some personal traits, the list of competences required from the foreign language mentioned in the subject literature is also impressively long and comprises, among others: linguistic competence, communicative competence, psycho-pedagogical competence, methodological competence, moral/ethical competence, intercultural competence, organis-

ational competence, innovative-creative competence and media-related competence (Zawadzka 2004). The multiplicity of roles a contemporary foreign language teacher is expected to perform in the classroom is also striking. Zawadzka (2004), for instance, suggests that he or she should act as: an expert, an educator, a cultural mediator, an organiser, a moderator, an advisor, an evaluator, an innovator a researcher and a reflective practitioner. The last mentioned role – that related to the teacher's ability of critical reflection as well as the whole idea of reflective teaching – has become a central feature of teacher education and professional development (Schön 1983; Wallace 1991; Richards and Lockhart 1996). Furthermore, it should be added that effective teaching goes far beyond a set of fixed types of personal characteristics, skills and roles and is characterised by a relatively high level of unpredictability and uniqueness. However, creating multiple opportunities for the teacher to develop a variety of competences undoubtedly contributes positively to the teaching process.

On a final note, as can be inferred from this short overview, the number of personal traits, competences and roles of the 21st century foreign language teachers is impressively high and one may only wonder how to ensure their continuous development in the course of university education.

3. The role of teaching practice in teacher education

Student teachers obligatorily receive a substantial dose of preparation for the profession in the course of their university education, as regards the teaching of their first subject, psychology, pedagogy and didactics. However, regardless of how much knowledge of selected methodological, psychological, pedagogical and educational issues they acquire during classes and lectures, such theoretical foundations do not suffice to turn them into fully-fledged teachers. The student's theoretical knowledge gained at the university must be integrated and/or confronted with the practical (field)

experience and hence the teaching practicum becomes a valuable opportunity for achieving this effect.

The issue of teaching practice within the framework of teacher education is well covered in the academic literature. Specialists representing various academic disciplines have explored the topic from different perspectives. A plethora of papers and studies can be found on the functions of the student practicum, its types, factors involved in student teaching, emotions accompanying its implementation, challenges and benefits accruing from it, tools to verify the effectiveness of teaching practice, trainee-mentor-academic supervisor relations as well as different concepts of organising practice in teacher training programmes. Some of these issues will be reviewed below.

Teaching practice is considered to be one of the most valuable components of initial teacher education (Hill and Brodin 2004). In scholarly debates it can be classified either as a form of *experiential learning* (Kolb 1984), *field-based learning* (Lonergan and Andresen 1988) or *learning by doing* (Schön 1987). Samujło (2011: 6) states in her report on the effectiveness of teaching practice programmes: the time spent by students at schools should serve the experience and skills development independently. Preparing for the role of a teacher should not be understood as an act of merely providing students with their mentors' experience but as a process of creating favourable conditions for student teachers' personal reflections on their own actions. It should be perceived as a developmental path during which trainees will use their knowledge to discover what knowledge and skills they need and how to gain them.

Multiple roles are assigned to the student practicum. For instance, according to Jakowicka (1991), out of the many roles (cognitive, educational, research, innovative and creative), the cognitive and educational functions should be given prominence in teacher preparation. Kuźma (2000) perceives the internship as the contribution of mainly adaptive, innovative and reflective character. The adaptive function consists in

adapting the student to the role of a teacher through his or her participation in a variety of situations in the school environment, the innovative function means the trainee's ability to create, innovate, design own methods of work and research while the reflective[3] function refers to the opportunity of a trainee to repeatedly rethink the undertaken actions and evaluate their effectiveness. Moreover, the teaching practicum affects the trainees' motivational sphere. From the study conducted by Derenowski (2015), it emerges that 78% surveyed students claim their decisions concerning the teaching career have been confirmed owing to the teaching practice, while 22% have realised the need to search for a different professional path. So, in the case of many students the field experience might exert a direct impact on their future career choices – either motivate them to pursue the teaching career or demotivate them due to their negative experiences during the internship.

Teaching practice can also function as a diagnostic tool (Richardson et al. 2018). The experience of direct contact with the pupils, the classroom and the school employees brings about the discovery of one's own strengths and weaknesses as a trainee. As a result, both student teachers and their mentors are able to identify the areas of teaching that have been accomplished successfully during the practice period and those still in need of some improvement.

Finally, while appreciating the existence of teaching practice as an indispensable component of teacher education, it is crucial not to overestimate the impact of teacher education on student teachers' preparedness for teaching. Some student

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[3] According to Schön (1983), who was inspired by the work of Dewey (1933), reflection is an essential component of professional knowledge and practice and, hence, it is essential to introduce reflective practice to the curricula in initial teacher education. Schön distinguishes two types of reflection, each characterised by a different purpose and character: as *reflection-in-action* (done immediately and simultaneously with the individual's actions) *and reflection-on-action* (generated after the action is completed). It is expected that teacher trainees will employ both these types during their practice as it might help them turn into reflective practitioners in the future.

teachers or mentors might assume that "Teacher education is all about being 'classroom ready'" (Loughran 2015: 13) and expect that it will equip a trainee with tools to handle all types of school situations. It should be emphasised that, as Northfield and Gunstone (1997: 55) aptly put it, "teacher education is by definition incomplete". It implies that teachers' preparation spans over a lifetime and neither graduating from teacher studies nor completing one's teaching practice automatically equals producing an accomplished teacher. The student practicum then might be considered only as one of the vital factors facilitating the student's entry into the profession.

All in all, the above-mentioned perspectives on teaching practice, its complex challenges and potential benefits accentuate its multidimensionality and make the present authors' investigation into the value of general pedagogy practice even more justified.

4. General pedagogy practice in the light of the Educational Standards in Preparation for the Teaching Profession

Teacher education and teaching practice in Poland must be organised in compliance with the guidelines set out in the Regulation by the Minister of Science and Higher Education of 17 January 2012 on Educational Standards in Preparation for the Teaching Profession[4] (Journal of Laws 2012, pos. 131). The Regulation presents a three-module format of teacher education. Module 1 relates to the trainee's preparation in the substantive scope to teach the first subject in accordance with the description of learning outcomes for the particular field of study. Module 2 refers to the trainee's preparation in the areas of psychology and pedagogy. The module consists of the following components: (1) general psychological and pedagogical preparation – 90 hours; (2) psychological and pedagogical preparation to teach at a given educational stage or stages –

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[4] Hereinafter referred to as "the Regulation".

60 hours; (3) psychological and pedagogical practice – 30 hours. Module 3 addresses the trainee's preparation in the didactic area. The components of this module are: (1) scientific basis of didactics – 30 hours; (2) didactics of the subject at a given educational stage – 90 hours and (3) didactic practice – 120 hours.

The teaching practicum occupies an important place in modules 2 and 3 as it comprises psychological, pedagogical and didactic preparation. It emphasises the role of complementary education involving the integration of theoretical content with practice, both in the sphere of psycho-pedagogical and didactic activities. It is expected that in module 2, the student will receive general preparation in the field of psychology and pedagogy, needed at a given educational stage, through participation in classes. In addition, the goals, role and shape of the practice enabling the development of pupil's care, educational and didactic skills are defined. According to the Regulation (2012: 10), the major purpose of general pedagogy practice is: "to gather experience related to the development and developments of the acquired psychological and pedagogical knowledge with pedagogical reality in practical operation". It appears fitting now to examine an extract from the Regulation (2012: 10-11) below, in which the characteristics of general pedagogy practice are formulated:

[...] Practice
During the internship, care and educational skills are formed through:

1/ getting acquainted with the specificity of a kindergarten, school or facility in which the practice is carried out, in particular getting to know the caring and educational tasks implemented by the school, the way of functioning and organization of work, employees, participants of pedagogical processes and documentation.

2/ observations of:

a/ organised and spontaneous, formal and informal activities of groups of pupils,
b/ activities of individual students including pupils with special educational needs,
c/ interactions between an adult (teacher, educator) and a child as well as interactions between children and teenagers (at the same and different age),
d/ processes of interpersonal and social communication,
e/ actions taken by the school mentor,
f/ ways of integrating various activities (related to care and education, didactics and therapy),
g/ group dynamics, roles played by members of the group, behavior and attitudes of children and teenagers,
h/ actions taken by the school mentor to ensure safety and discipline in the group.

3/ cooperation with the mentor in:

a/ exercising care and supervision over the group in ensuring security,
b/ taking up educational activities resulting from existing situations,
c/ undertaking activities for learners with special educational needs,
d/ conducting organised educational activities.

4/ acting as a guardian-educator in particular:

a/ diagnosing group dynamics and a position of individuals in the group,
b/ getting to know pupils and their social status, needs, interests and skills, determining the level of developmental preliminary diagnosis of disorders and dysfunctions,
c/ independent conduct of care and educational activities,
d/ taking care of a group of pupils in the course of their spontaneous activities,
e/ planning and conducting educational classes (i.e. integrating activities and preventive actions) on the basis of self-developed scenarios,

f/ animating group activity and cooperation of its participants, organising pupils' work in task groups,

g/ undertaking individual work with pupils (including learners with special educational needs),

h/ undertaking educational activities of an intervention nature in conflict situations, situations of security threat, violation of other people's rights or failure to comply with established rules,

i/ taking care of the group of pupils outside the kindergarten or school,

5/ analysis and interpretation of observed and experienced situations and pedagogical events including:

a/ keeping practice documentation,

b/ confronting the theoretical knowledge with practice,

c/ self-assessment (being able to see own strengths and weaknesses),

d/ assessment of the course of activities and the implementation of established aims,

e/ post-observation meetings with the mentor to discuss observed situations and conducted activities,

f/ discussing accumulated experience in a group of students at the university.

The 30-hour general pedagogy practice is a kind of prelude to a 120-hour didactic practice, during which student teachers are required to pursue their obligatory activities and make observations of this preliminary practice. As can be noticed from the earlier quoted extract from the Regulation, considerably high expectations are placed on trainees as regards the number and scope of activities to be carried out during the practicum, preferably under the supervision of an experienced school mentor. While on the internship, trainees must be provided with an opportunity to observe and participate in the school life in a newly assigned role – that of a teacher trainee. Apart from the contact with the school mentor, they are also expected to cooperate with the head teacher, other teachers and school employees as well as pupils. Ultimately, the student teacher should gain a profound understanding of the

functioning of the school institution. In order to ensure the completion of these objectives and the provision of high quality teacher education, universities must offer well-prepared and sufficiently detailed internship programmes. This vital issue is to be explored in the subsequent section.

5. Different models and concepts of organising general pedagogy practice in teacher education

As Ure (2009: 13-13, 18-19) claims, four major philosophical models of teacher education programmes can be found in the subject literature on the design in higher education, namely the partnership or collaborative learning model, the reflective model, the academically taught or clinical model and the pedagogical content knowledge model. Each of these models presents a slightly different view of schooling and teacher education. For instance, in the partnership or collaborative learning communication, collaboration, negotiation between the university and the schools of the practicum are of crucial importance. The reflective model promotes the reflective approach to trainees' internship and ensures the reflective process engages different partners of the internship. In the academically taught or clinical model, it is proposed that the practicum is extended in order "to provide preservice teachers with time to analyse and evaluate student development and learning, and to develop more individualised approaches to teaching and intervention in student learning" (Ure 2009: 14). Finally, the pedagogical content knowledge model emphasises the need to strengthen the relation between subject matter and pedagogy to provide trainees with a solid knowledge base of content and pedagogical issues that will allow them to improve their teaching ability. It should be added that different teacher training institutions frequently adopt a hybrid of the above-mentioned approaches to their pre-service programmes of the student internship.

Apart from the philosophical models of teacher professional learning that constitute frameworks for the pre-service

teachers' programmes, teacher training institutions have developed practical procedures and instruments to manage the student practicum. The Polish institutions engaged in teacher education must all be based on the same document – the Regulation concerning the educational standards for teacher education (2012). Despite the same legal basis, various teacher training institutions have developed their programmes and proposals as regards the implementation of general pedagogy practice as well as didactic practice. The solutions differ in the choice and number of tasks for trainees, hourly allocation, duration, the way of documenting, as well as the criteria for assessing the trainee's internship. It might now be interesting to briefly examine several organisational solutions offered by selected Polish universities. The discussion will only be limited to the module of general pedagogy practice as this constitutes the main interest of the present paper.

Let us look at one interesting example of the pedagogy practice organised by the Faculty of Humanities of the Maria Curie-Skłodowska University in Lublin (*Nowy program Praktyki Ogólnopedagogicznej* nd.). Trainees of different humanistic majors (including English Philology) complete 36 hours of the continuous pedagogical practicum. During this period student teachers become acquainted with numerous aspects of schooling:

> The official dimension of school functioning – duration: 2 hours
> Hidden dimension of everyday school life – 2 hours
> Organising the learning environment – 3 hours
> The teaching-learning process during the lesson – 3 hours
> School conditions of upbringing – 2 hours
> Teacher-pupil relations – 2 hours
> The role and tasks of the educator in organizing work with a class – 8 hours
> Pupils' self-government and organization of free time – 2 hours
> Safety and prevention at school – 3 hours
> Family – forms of family support – 3 hours
> Supporting pupils – 6 hours

Pre-service teachers are obliged to prepare written document-
ation of their practicum in the form of a portfolio, referring to
a variety of mandatory and optional tasks. The portfolio should
contain several written assignments, for instance, a written
essay "The analysis of a situation causing disturbance in the
class" (description of a pupil's disruptive behaviour – the
teacher's reaction, effects of the intervention, own interpret-
ation and evaluation of the teacher's response). In addition,
the trainee is provide expected to submit a written character-
istics of a selected school class and a protocol of the observed
form period (led by a tutor) with the trainee's analysis and
evaluation. The portfolio also includes the trainee's own lesson
scenario of a form period which he or she has conducted
during practice together with some assessment remarks. Apart
from these obligatory writings, there are several optional tasks
that the trainee can choose from. The student teacher's
practicum is assessed on the basis of his or her commitment,
the school mentor's opinion and the written contribution
included in the portfolio.

   Another model of general pedagogy practice has been
implemented at Adam Mickiewicz University in Poznań.
According to the regulations of general pedagogy practice
(*Praktyka psychologiczno-pedagogiczna* [...] nd.), the duration
of the internship is 30 hours, including 20 contact hours,
5 hours for students' own work to prepare the scenarios or
tasks to be implemented during general pedagogy practice and
5 hours to prepare documentation (portfolio, notes, self-
assessment) after completing the internship. As the main aim
of this practice is to shape trainees' care and educational
competences, students are obliged to assist their mentors
(preferable a school pedagogue or a psychologist), and observe
different types of educational lessons as well as plan and
conduct a few educational lessons and activities. Student
teachers together with their mentors (pedagogue or psycho-
logist) decide which educational classes, activities they will
participate in.

The tasks for student teachers could be generally divided into three groups, among which the first group of tasks comprises activities in which trainees assist different school workers (educators, psychologists, teachers, etc.) in their work, observe different educational classes or activities (7 hours) and later construct a short report, in which they characterise the observed activities and finish each short report with their own reflections. The remaining two groups of activities focus on stimulating trainees' creativity and encouraging their individual practical work, for instance, by performing the role of an educator, planner and tutor leading the classes of educational character (3 hours). After each class the trainee is supposed to prepare a note with the evaluation of the course of independently carried out activities and the assessment of the achievement level of the assumed objectives. Three hours are given to student teachers' disposal to perform the role of an educator in a school lounge. To prepare and discuss together with their mentor educational activities and design scenarios for school events student teachers are assigned 8 hours of the practicum period. Within one hour students are obliged to prepare a kind of sociogram in which they will examine and analyse the structure of a class assembly. In addition, the trainee's self-assessment is required (5 hours) in which the trainee comments on his or her strengths and weaknesses in relation to the prospective role as a subject teacher and an educator. To verify the learning outcomes, student teachers are obliged to complete journals of student internship and prepare portfolios consisting of post-observation reports on observed educational activities together with trainees' own reflections (collecting information), scenarios of all lessons and activities conducted (practical task requiring reflection), description of a sociogram together with the analysis of a class assembly and self-assessment (practical task requiring analysis and diagnosis) and finally all the aids obtained or constructed by the trainees.

At this point of the discussion, it seems worth mentioning Pankowska's Report (2011) on the organisation and effective-

ness of teaching practice at selected (30) Polish teacher training institutions, which offers an invaluable insight into various aspects of the practicum as realised by different universities, including its compliance with the educational standards, ways and content of documentation, the scope of duties of different stakeholders, relations between the academic supervisor, the school mentor and the student teacher. According to the Report, the tasks designed by the examined universities can be grouped according to 5 categories: (1) collecting information, (2) practical tasks focusing on cognitive activities (interpretation, assessment, reflection), (3) practical tasks requiring diagnosis, (4) practical tasks related to the trainee's methodological skills and (5) practical tasks with regard to psychosocial skills. The findings reveal that the majority of the tasks in the examined teaching practice programmes aim at developing didactic skills and allow for searching information about the school environment. The other types of tasks are of minor importance while tasks requiring trainees to develop their diagnostic and psychosocial skills are "avoided or treated marginally" (Report 2011: 45). Furthermore, the studies analysed in the Report suggest the most frequent ways of documenting the trainee's actions are: lesson plans (also scenarios of form periods), observation protocols, mini-essays, practical materials designed by the trainee, analyses of different educational situations, characteristics of selected age groups, projects, descriptions of school events, assessment sheets and reflections. Let us close the current discussion by quoting, paradoxically, the opening sentence of the recommendations related to the design of tasks during the trainees' internship (Report 2011: 48):

> [t]he selection of tasks is of primary significance for the effectiveness of the teaching practice, both in relation to the established objectives (whether trainees are able to achieve them), preparation for the professional start (whether they will be adequate for the future tasks of the teacher) as well as regarding the trainees' commitment and attitude.

It appears fitting to state that the choice and design of tasks for the internship might help to guide student teachers through their practice and highlight the most essential areas for development. The process of completing a series of specific tasks might also facilitate the student teacher's later reflection on the entire practicum. Therefore, selection of tasks must be done in a careful and well-planned manner. The subsequent section of the paper aims at developing this issue.

6. A proposal of general pedagogy practice tasks at the Institute of English and American Studies, Gdańsk University

As emerges from the discussion generated in the previous section, regardless of some differences in the organisation of general pedagogy practice at various Polish universities, it is possible to identify some common ground, that is the educational stakeholders' deep concern for the effective implementation of the current educational standards as indicated in the Regulation and for providing effective teacher education programmes. It also becomes evident the design and selection of tasks within the teaching practicum might exert a considerable impact on the success of the internship and also on the trainee's positive perception of the field experience. The current section aims to present the choice of tasks as designed by the team of academic supervisors of the practicum at the first-cycle studies of English Philology at Gdańsk University.

First-year English Philology students of teaching specialization (BA) at the University of Gdańsk are required to complete a 30-hour general pedagogy practice. The trainee's role is to observe different aspects of school, a variety of phenomena taking place in the school and assist the school mentor in his or her work. Therefore, it is implemented in cooperation with a mentor, i.e. a school tutor supervising the internship. It seems that the minimum number of 30 hours proposed for the implementation of general pedagogy practice suggested in the

Regulation [...] allows for a rather limited understanding of the school's system of functioning; yet, as assumed, it enables student teachers to become acquainted with the basic knowledge of the school life in which they complete their practicum.

In order to maximize the effects achieved during the internship, appropriate procedures, institutional regulations and practice activities should be established. Given the five basic trainee activities outlined in the Regulation, i.e. 1) becoming familiar with the specificity of the kindergarten, school or institution, 2) observing, 3) cooperation with the internship supervisor, 4) acting as a guardian and an educator, 5) analysing and interpreting pedagogical situations and events, a number of pedagogical tasks have been designed for the trainee to perform at the school of internship.

Furthermore, it is expected that during the internship student teachers prepare documentation of their practicum in the form of a portfolio. The portfolio consists of a set of official documents signed by the head teacher, school mentor and academic supervisor, description of obligatory tasks to be performed during the internship and in compliance to the guidelines contained in the Regulation as well as the trainee's written reflections of the practice. Completion of each activity in the tasks is to be confirmed by the mentor with a signature next to the task name. The tasks, they are divided into two groups, the first of which concerns the documentation and work of various school bodies, and the second relates to the trainee's active participation in various school events. In addition to these two tasks, the internship documentation includes a compulsory section entitled "Reflections on your general pedagogy practice", which will be discussed in greater detail in the study.

Table 1 and Table 2 below present the two obligatory tasks outlined in the practice portfolio to be completed by the trainee as part of general pedagogy practice.

Table 1
Description of Task 1

TASK No 1
During the internship the trainee is obliged to become acquainted with: 1. The organisation of the school as an institution providing both care and education 2. The way in which form teaching is planned and realised in the school 3. The role of a school pedagogue/school psychologist 4. Work in the school common room, library, dining hall, etc. 5. Organisation of extra-curricular activities 6. Planning and realisation of the class tutor' duties 7. School documentation (teaching plans, assessment documentation, school statute, school self-assessment system, school curricula) 8. Team-work in subject areas (e.g. the foreign languages teaching team) 9. Teaching aids and school and classroom equipment

It is expected that after completing the first obligatory task the trainee should be able to characterise a given school, describe its statutory tasks, organs and the equipment it has, characterise basic documents regulating school work and be able to keep school records. Furthermore, it is hoped that the student teacher will be able to define the tasks and competences of teachers and other school staff (including a pedagogue, psychologist, librarian, teacher of the community centre, etc.) and discuss the principles of their cooperation with various participants in the pedagogical process (including work in subject teams). Table 2 below outlines Task 2 and activities to be performed by the trainees.

Table 2
Description of Task 2

TASK No 2
It is important that during the internship the trainee is involved in at least 7 of the activities given below: 1. School assembly 2. School celebration/party 3. Teacher-parent meeting 4. Subject teachers' meeting 5. Teacher duty hours 6. Extra lessons/extracurricular activities/special interest group 7. Working with the class tutor 8. Helping to organise a school competition 9. School trip/outing 10. Other (describe) ....

As can be inferred, the second obligatory task requires the trainee to actively participate in various school events and/or conduct classes of educational nature. The set of activities included in this task puts trainees in a specific school-based situation, allowing them to gain valuable practical experience, and reflect on their own actions. Task 2 contains 9 examples of activities that could be implemented during the internship, but it is also indicated that the student teacher can perform a task that is not included in the list. The decision to allow trainees to add a new pedagogical activity to the list stems from the academic supervisors' wish to promote student autonomy and grant students and their mentors the choice of tasks. According to the instructions, however, trainees should attend at least 7 school events of different type. The attendance is to be confirmed by the mentor's signature. Events such as the pre-service teachers' participation in the school assemblies, celebrations, compensatory classes, inter-

est circles and his or her assistance in the preparation of school competitions aim at helping to familiarise trainees with selected elements of the school reality. They enable student teachers to recognise the developmental needs and abilities of pupils in a given age group (including the specificity of working with a learner with special educational needs), observe motivational techniques applied while working with pupils, and also provide them with an opportunity to develop their own methods of work. Trainees' (active or passive) participation in a form period (lesson devoted to educational matters, run by the class tutor), a teacher-parent meeting, a meeting of a subject team, a hallway duty or organizing a school trip might raise their awareness of the school's educational role and some preventive measures taken to ensure safety and maintain discipline among pupils.

Summing up, as regards the design of this part of the student practicum, both obligatory tasks have been composed in agreement with the abiding educational standards in teacher preparation. The tasks are differentiated and relate to various psychological and pedagogical aspects of schooling. Their number and choice has been planned to enable the student teacher to become familiar with the school staff, documentation and equipment as well as to help him or her to assist the mentor in planning and conducting various educational activities. It is expected that the proposed tasks will help to improve trainees' organisational and social competences, and will allow them to discover the methods of effective communication with students, parents and other pedagogical and non-pedagogical employees during classes and extracurricular activities.

7. The reflection section of the student teacher's portfolio

As mentioned in the previous section, the portfolio serves as a way of documenting the trainee's commitment to practice

and his or her progress on the way to become an autonomous teacher. The subject literature abounds with papers and studies on the significance of introducing a portfolio as a tool for practising the skill of reflection in trainees and supporting their development as reflective practitioner (Wolf and Dietz 1998; Zeichner and Wray 2001). The form and content of the portfolio differs considerably at different institutions. As regards the portfolio used for the purpose of general pedagogy practice at our Institute, there are three major components. Apart from the earlier described two parts of the portfolio, i.e. documentation confirming the realisation of Task 1 and Task 2, the trainees are expected to complete the third section entitled "Reflections on your general pedagogy practice" (see Table 2), in which they write down their reflections on this part of their internship according to the outlined points.

Table 3

The reflection section of the portfolio of the trainee's general pedagogy practice

REFLECTION ON YOUR GENERAL PEDAGOGY PRACTICE
1) Give your impressions of the school, the staff and the learners.
2) From the procedures and activities you were involved in or observed:
a) describe three you were able to do with ease or enjoyed doing and give your reasons
b) describe three you found more problematic and give your reasons.
3) Select a number of areas from this part of your practice. Say what you feel you have learned from them and how this knowledge will be useful for you in the next part of your practice.
4) Other comments relating to this part of your practice that you would like to share

The first part of this reflective exercise (designed by the team of university practicum coordinators) refers to the trainee's general impressions of the school where they completed their practice as well as of the teachers and pupils they met. In the second part, the trainees are asked to provide a comment about the obligatory tasks they consider to have been easy, enjoyable or difficult. The third part of the reflection encourages trainees to explore selected areas of the practicum and justify these aspects' contribution to trainees' development as future teachers. In the final part, the trainee is invited to submit any additional remarks related to the completed field-experience.

It is expected that trainees' reflections alongside their oral comments and school mentors' feedback might provide useful research material for analysis and the findings will help to identify the attitudes of student teachers of English to different areas of pedagogy practice, the level of their preparation for the profession, the mentors' opinions about the strengths and weaknesses and will indicate directions of future improvements. A description of a short qualitative study on the student teachers' reflections on their general pedagogy practice and their performance of the above-mentioned practicum tasks can be found in another paper in this issue of *Beyond Philology*.[5]

8. Concluding remarks

The paper offers considerations related to the profile of a contemporary foreign language teacher, required personal attributes and competences, and underscores the multifarious role of general pedagogy practice in trainees' initial teacher education. It is the authors' hope that the presented practical proposal of tasks to be completed by trainees during the internship will also be of interest to educational researchers and practitioners engaged in teacher education. Finally, the

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[5] The study is described in the paper entitled "Pre-service teachers' views on their general pedagogy practice: An analysis of trainees' reflections".

paper aims to accentuate the need to systematically monitor the system of the internship at the teacher training institutions. It, therefore, appears warranted to conclude with some remarks concerned with enhancing the overall quality of the practicum component at teacher training institutions. Our recommendations are as follows:

- integrating the theoretical and practical components more closely (classes and lectures on pedagogy, psychology, methodology should be closely correlated);
- adapting the problems discussed in the classes during the realisation of the module of psycho-pedagogical education to the needs of teacher trainees;
- extending the required length of general pedagogical practice as the currently suggested period (30 hours) is far from sufficient; trainees' preparation needed to develop a number of educational competencies requires much more time than can be provided by such a short-term pedagogy practice;
- improving the quality of university-school partnership, cooperation of academic supervisors of internships with school mentors – for instance (through exchange visits, meetings, online communication, conferences and reports);
- facilitating an exchange of experiences and observations between trainees and mentors (through direct or online discussion, forums, conferences);
- organising a series of trainings, workshops, courses or optional classes for all parties involved in the practice – practicum coordinators at the university, school mentors and trainees, (e.g. for trainees – workshops on topics frequently identified by them as "difficult", such as class management, discipline problems, conflict situations, educational issues, elements of educational law, keeping school records; for academic practicum co-ordinators and school mentors – e.g. workshops on the art of mentoring or observation, teaching a reflective approach in education);
- introducing a series of reflective exercises necessitating more lengthy, analytical comments on the implementation of each of their practicum tasks (for example an analysis of critical incidents);

- modifying the reporting system by requiring trainees to submit more detailed reports on their general practice;
- providing more frequent and systematic oral and written feedback on trainees' involvement or development of their competences;
- raising the prestige/value of GPP in general assessment of a student (for instance by assigning more ECTS points to trainees for this part of practice);
- collecting and using educational materials of different kind at the university library – records, films, books, magazines, professional literature on teaching practice at schools – as aids for the academic supervisors.

It seems imperative that frequent improvements are undertaken by teacher training institutions to revitalise teacher education through successful internships. This could only be achieved provided there exists active collaboration and a high level of commitment among different stakeholders involved in the organisation of trainees' teaching practice.

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Pre-service teachers' views
on their general pedagogy practice:
An analysis of trainees' reflections[1]

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Abstract

The aim of the paper is to present the reflections of pre-service teachers of English of their general pedagogy practice. Their views on different aspects of the practicum are content-analysed as well as the feasibility of the tasks assigned to them during the field experience is verified. The first part contains an overview of selected issues related to teaching practice, among others the theory-practice gap, competences of a modern foreign language teacher, with special focus on his or her role of an educator, emotions accompanying the trainees' field experience as well as relations between the university practicum coordinator, a school mentor and a trainee. There are also some considerations devoted to reflectivity, critical incidents and instruments supporting and monitoring effectiveness of the internship. The second part of the paper focuses on the small-scale qualitative study based on the reflections of first-year English philology students performing their general pedagogy practicum as part of their teaching specialisation. The article closes with some remarks related to the research findings.

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[1] This paper continues the discussion started in our paper entitled "On the value of general pedagogy practice in teacher education: A proposal of teaching practice tasks", in this issue of *Beyond Philology*.

Keywords

general pedagogy practice, reflections, trainees, foreign language teacher, tasks

Opinie na temat roli praktyki psychologiczno-pedagogicznej w przygotowaniu do pełnienia roli nauczyciela – analiza refleksji praktykantów

Abstrakt

Celem artykułu jest przedstawienie refleksji przyszłych nauczycieli języka angielskiego na temat ich praktyki psychologiczno-pedagogicznej. Ich opinie na temat różnych aspektów praktyki są analizowane pod względem treści, jak również wykonalności zadań przypisanych studentom podczas praktyki. Pierwsza część zawiera przegląd wybranych zagadnień związanych z praktyką nauczycielską, takimi jak rozbieżności między teorią a praktyką, kompetencje współczesnego nauczyciela języka obcego, ze szczególnym uwzględnieniem jego roli wychowawczej i emocje odczuwane przez praktykantów, a także relacje między akademickim koordynatorem praktyk, szkolnym mentorem i praktykantem. Zawarto również rozważania poświęcone refleksyjności, incydentom krytycznym i narzędziom wspierającym i monitorującym efektywność praktyki. Druga część tekstu przedstawia krótkie badanie jakościowe oparte na refleksjach studentów pierwszego roku filologii angielskiej realizujących praktykę psychologiczno-pedagogiczną w ramach specjalizacji nauczycielskiej. Artykuł kończy się uwagami związanymi z uzyskanymi wynikami badania.

Słowa kluczowe

praktyka psychologiczno-pedagogiczna, refleksje, praktykant, nauczyciel języka obcego, zadania

1. Introduction

Teaching practice is an indispensable component of teacher education and requires constant attention and monitoring in

order to ensure its best quality. Apart from numerous personal traits and methodological competences expected of contemporary foreign language teachers, the role of an educator is becoming central in view of an increasing number of educationally challenging situations at school. According to the *Regulation by the Minister of Science and Higher Education of 17 January 2012 on Educational Standards in Preparation for the Teaching Profession* (2012), student teachers are obliged to complete a module of the practicum devoted entirely to the development of their psychological and pedagogical knowledge in a real school context. Rather formidable aims are established to be fulfilled during the trainees' internship, including for instance, familiarising with the functioning of the school, its administration, documentation, collaboration with external bodies, assisting mentor teachers in their role of an educator by dealing with learners with special educational needs, co-organising and participating in a variety of school celebrations, competitions, trips and designing and conducting period forms (tutor-led classes). To accomplish these noble aims trainees are granted the period of a minimum 30-hour general pedagogy practicum, which seems an alarmingly short time for highly intensive work. It is interesting then to examine how trainees cope with the realisation of tasks imposed on them during the internship and the complexity of their field experience makes the present authors' investigation into the issue of general pedagogy practice even more justified.

Considering the limited format of the paper, only selected issues closely related to teaching practice will be briefly reviewed with reference to the subject literature. The major part of the paper, however, will be focused on a description of a small-scale preliminary study of qualitative character, analysis of the findings and some final remarks aimed at improving the quality of general pedagogy practice and amending the task design. It was interesting for us to identify the trainees' attitudes to the obligatory general pedagogy practicum tasks as well as to define the role of general pedagogy practice at the start of their teaching career. In

addition, we were hoping to discover the suitability of the tasks designed for this part of teaching practice and use the obtained results to monitor the system of organising general pedagogy practice at the university.

2. Common issues, themes and challenges
    in teaching practice

One of the issues that is frequently mentioned in the professional literature related to the teaching practicum is the divide between theory and practice. We also expect this problem to reappear in the conducted study described in the subsequent part of the paper. The problem of the gap between what student teachers know about the didactics, methodology, pedagogy and psychology from their university classes and the actual implementation of this knowledge in the school reality was identified, for instance, in the studies conducted by Gabryś-Barker (2012) and Blaszk (2015). Also, Zawadzka refers to this dichotomy and in her book on foreign language teachers in the era of changes, she devotes a whole chapter to the mutual relations of teacher education and professional practice (2004). She argues, for instance, that

> The opinion about the little usefulness of theory in teacher practice results -in my opinion-primarily from mistaken assumptions and expectations regarding theory and ambiguity of the concept of theory in the teaching profession. [...] and a false assumption that theories and academic research reflect an objective educational reality and that they provide confirmed and reliable rules for didactic action [...].
>
> (Zawadzka 2004: 100; translation mine, OA)

Undoubtedly, it seems unreasonable to assume that it is sufficient to know in order to be able to act in an effective way. Permanent practice and exposing oneself to numerous situations confronting theory with practice might reveal the possible connections as well as discrepancies. Therefore, student teachers should be taught during their academic

courses to approach their teaching practicum with appropriate sense of distance. Trainees should be educated to permanently question their received theoretical knowledge and need to be shown how to modify their personal assumptions, subjective theories and views to the changing school realities. They need to be aware of high unpredictability of pedagogical situations and able to restructure their existing knowledge. University lectures and classes on pedagogy, psychology and didactics should provide the trainee with a tool to create new solutions on the basis of the possessed intellectual resources.

As previously explained in the introductory part, prospective teachers should also be prepared for a difficult role of an educator which requires from them a number of vital personal characteristics such as maturity, sensitivity, empathy, respect for human beings and high moral and ethical competences. Zawadzka (2004: 183) enumerates, for instance, the following desirable attributes of a good educator: "kindness, under-standing, a sense of humour, fairness, setting high demands, calmness and composure, an ability to cooperate and interact, a wide interdisciplinary knowledge and an ability to impart it, knowledge of youth problems, propriety and being an authority" (translation mine, OA). This list of expected features can probably be extended, which makes the preparation of trainees to become proper educators a more challenging process. It can only be hoped, then, that candidates for the teaching profession already possess the mentioned qualities and that they may later be able to enhance them during the student practicum. Enabling trainees to participate in a variety of classes, extracurricular activities, school celebrations, trips and other formal and less formal pedagogical events, undoubtedly, provides them with a number of opportunities to have contact with children and young people and verify their predispositions for the teacher's job.

Closely related to the responsibilities of teachers as educators is the issue of time and classroom management as well as handling educational problems. As discussed in Szymańska-Tworek and Turzańska (2016), and Zawadzka

(2004), a large number of student teachers find it difficult to manage time in the school environment. Trainees are also generally reported to fail in coping with conflict situations and maintaining discipline. Similar observations will be shared by us in the study findings section.

Another interesting aspect of the internship found in academic papers relates to the emotions felt by trainees as well as some social phenomena encountered during teaching practice. Some student teachers are reported to be overwhelmed with positive emotions (satisfaction, self-assurance etc.), while others display stress, anxiety and hesitation (Murray-Harvey 2000). As revealed in the studies, they witness either enjoyable moments, for instance, when their pupils achieve successes because of their intervention or frustration, dissatisfaction and disappointment when they face negative phenomena, such as racism and sexism (Menter 1989). Our study findings will also refer to this aspect of the student practicum, revealing a wide spectrum of emotions experienced by trainees and confirming the impact the field experience exerts on the trainees' affective side.

Moreover, the mutual relations between the three major participants of the teacher training process, i.e. a trainee, a school mentor and an academic supervisor, are subject to academic discussion and analysis (Blaszk 2015, Mizel 2017). Blaszk (2015: 20-21) analyses the impact of the school mentor's methodological competence on his or her trainees and reports different types of relations: some based on "the authoritarian position of the mentor", while others causing conflicts with a student being "at odds with his mentor" due to opposing views on didactic solutions applied at lessons. Mizel, on the other hand, discusses the teacher mentors' needs and points to some complaints they claim to have about their mentoring, enumerating a host of problems caused by the trainees, such as their coming late for the practicum, their inability to listen to their advice, and other organisational obstacles – "onerous workload" or "the short recess periods" preventing them from giving the trainees "effective instruction".

He cites one mentor's complaint about the trainee who "contribute[d] nothing to the classroom" and instead of helping, they constituted a "disturbing influence" (Mizel 2017: 124). There are some positive effects of the mentor-trainee relations mentioned there too, such as mentors benefitting from learning the new methods of class work applied by their trainees, "a feeling of partnership" and "belonging" (Mizel 2017: 124) and their "feeling of being esteemed" by trainees (Mizel 2017: 125).

Of pivotal importance is also the issue of reflectivity developed during the student practicum. Numerous studies have been conducted on the power of reflection and its impact on trainees' development (Schön 1987, Wallace 1991). There is general consensus among researchers that it is highly beneficial to promote and pursue reflective teaching as well as to engage teacher trainees in different reflective exercises. Richards (1990: 5), for instance, claims that "self-inquire and critical thinking can help teachers move from a level where they may be guided largely by impulse, intuition, or routine, to a level where their actions are guided by reflection and critical thinking." Another evidence that the student practicum can impact the development of trainees' reflectivity comes from Derenowski (2015). The results of the survey and interviews conducted by him with a group of student teachers reveal that their participation in the internship has influenced their perception of the teaching profession. The impact was established owing to the numerous occasions the trainees had to reflect upon the actions they had undertaken. Derenowski (2015: 37) reports that "testing and school documentation were not the topics requiring reflection" and that "the students did their reflection on the specificity of the teaching profession as well as, and also equally importantly, on their personality features and the course of school lessons" (translation mine, OA). He concludes that undoubtedly, the practicum increases student teachers' ability to make conscious decisions related to the choice of their future profession and their ability to engage in self-reflection.

Critical incidents are another common issue explored when tackling the issue of the student practice and the topic of reflection in teacher education. A critical incident is defined by Trif (1993: 8) as "an interpretation of the significance of an event. To take something as a critical incident is a value judgment we make, and the basis of that judgment is a significance we attach to the meaning of the incident". It has become a valid element of successful teacher professional development due to its power to trigger in teachers and trainees some important insights into various areas of education. Richards and Farrell (2010) enumerate a noticeable number of benefits of using critical incidents in developing teachers' professionalism, among others their positive effect on increased self-awareness, improved critical approach to pedagogical situations, enhanced evaluations skills, favourable conditions for action research. They claim that recorded and shared critical incidents can help to build more permanent output such as a network of critical practitioners and a useful learning resource for other teachers.

Finally, it is worth noting that different tools are employed by educators to assist trainees in the realisation of their practicum, empowering them to become reflective practitioners, and simultaneously verifying the effectiveness of their internship. The subject literature mentions, for instance, using *The European Portfolio for Student Teachers* of *Languages* (Newby et al. 2011), writing a diary (Tripp et al. 2013), a blog (Luik et al. 2011), a portfolio or a journal (Chu et al. 2012; Leslie and Camargo-Borges 2017) or participation of trainees in a blog group discussion (Insuasty and Castillo 2010) in order to record the trainees' impressions, observations, reflections at various stages of the practicum (*reflection-in-action* and *reflection-on-action*). The data obtained from such sources provides an invaluable feedback on different aspects of teaching practice.

To sum up, the high number of themes and topics related to teaching practice can only indicate the complexity of the issue of teaching practice and points to the need to explore the

functioning of the practicum in one's own teacher training institution. The second part of the paper deals with the study based on pre-service teachers' reflections of their practicum and will show the connection between some of the topics reviewed above and the field experience of our trainees.

3.   The study[2] – description, results and discussion

3.1. Research description

The present section aims to describe the research methodology, population, data, tools and main study procedures as well as to present the findings. The discussed research reveals the perceptions of general pedagogy practice among the prospective teachers of English. The small-scale study places itself within the qualitative research paradigm and makes use of document analysis as a research method. It appears warranted to add that the present study was based on the trainees' portfolios whose design and content were thoroughly described in another paper in this volume.

The research was conducted among first-year students of English Philology, teaching specialisation, at the 3-year licentiate studies at the University of Gdańsk in the period of 2012/2013 and 2013/2014. The participants consisted of 65 trainees at the start of their teacher training programme – completing merely the second semester of the first year of their studies. It can be assumed that at the time the student teachers' reflections were studied, they possessed little previous methodological input and had no or little experience of language teaching. The major goals of the study were twofold:

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[2] The document analysis described in the present paper constitutes a small part of a larger research project carried out at the Institute of English and American Studies, the University of Gdańsk, in the period of 2012-2019, whose main goal is to raise the effectiveness of the teaching practices programme.

(1) to identify the trainees' views of their general pedagogy practice;

(2) to monitor the system of organising general pedagogy practice at the university, specifically examine the choice of tasks assigned to trainees, their usefulness and feasibility.

In order to explore the students' opinions about the completed general pedagogy practice, the researchers gathered a corpus of 65 student teachers' portfolios for the purpose of analysis. The written assignments were submitted to their academic supervisors after completing their internship in primary schools of the Pomeranian Voivodeship. The data was collected through analysing the portfolio written by each trainee during the period of their 30-hour general pedagogy practicum completed in the second term of their first year of under-graduate studies. The obtained data was content analysed. The qualitative content analysis was performed in two steps: firstly, the content of the reflections' section was examined in search for the information regarding specific aspects of the practicum, and secondly, it was interpreted with a view to drawing conclusions and gaining a deeper under-standing of the trainees' perception of the field-experience. The trainees' reflections included in the portfolios were read three times by two researchers. During the first reading, important themes and problems were identified and noted down, during the second reading the issues addressed by the trainees were grouped and categorised, and during the third reading some emerging themes were examined by the researchers again.

3.2. Analysis of the reflections

In the reflection section of the portfolio, the examined students documented events and situations taking place in their school of teaching practice and presented their thoughts and impressions of their practicum at school. Several sources supported the documentation of the students' reflections, for instance, their conversations with the head teacher, school

mentor, other teachers and non-pedagogical workers, the trainees' observations of the school space, the knowledge gained from reviewing school documentation and their active and passive participation in various educational events.

The analysis of the trainees' written assignments yielded several vital themes, such as pedagogical and psychological knowledge, self awareness, self-ability to perform educational tasks, recommendations for self-improvement and realities in schools. Some of these issues i.e. the trainees' ability to perform selected educational tasks during the practicum as well as their perception of these tasks are explored in this paper at greater length.

Due to the limited volume of this publication, however, only two issues included in the trainees' reflection will be explored, with reference to both goals of the study. The analysis and discussion of the remaining points is hoped to appear in another publication. In the researchers' opinion, the student teachers' responses to the two selected subpoints – 2 a) and 2 b) have provided ample valuable feedback and deserve to be presented foremost. Examples of tasks done with ease/pleasure or some difficulty will be provided. The student teachers' answers will be discussed and interpreted. In addition, quotes from selected student comments will illustrate the issues raised more succinctly.

3.2.1. Tasks performed by the trainees with ease and/or pleasure

As emerges from the analysis of the reflections, the activities most frequently mentioned by the trainees as carried out "with ease and/or pleasure" include:

- assisting in conducting extracurricular activities (competitions, festivities, assemblies, performances, retreats, activities for talented youth);
- help in organising exits from school (e.g. for workshops);
- an individual lesson with a student;

– watching mentoring in action (especially of a successful type);
– familiarisation with the school's infrastructure;
– participation in meetings of the subject teams;
– getting acquainted with well-organised documentation.

It is remarkable that a high number of students emphasise the support they received from various individuals supervising their practicum, including the head teacher, school mentor and school pedagogue during the implementation of their tasks:

(S1) *During the realisation of most of the tasks, the school management and the mentor showed interest and helped me when it was needed. (...) The atmosphere prevailing in this school was extremely friendly and conducive to work, especially students who could approach the work entrusted to them without stress.*

(S2) *I had serious concerns about starting the practice when I realized that I had to go back to the school where I was studying, but thanks to my mentor it was a great experience. My practice supervisor made my practice both a pleasant personal and didactic experienc*e.

(S3) *The most interesting task that I did during my internship was a meeting with a school mentor. The teacher allowed me to get acquainted with the documentation related to the work of the school pedagogue. The mentor gave me very detailed explanations. I did not realize how serious problems the teachers are facing and what tools they can use to solve these problems together with parents. Meetings with my school mentor were very informative and interesting for me.*

The trainees expressed their enthusiasm about the tasks that required their active involvement in the organization of school events. Their enjoyment is reflected, for example, in the following students' statements:

(S4) *My task was to prepare a quiz about Great Britain. The quiz was constructed in such a way that the students could test their knowledge not only of English, but also geography and history in an interesting and funny way. In my opinion, such competitions should be organized more often, as they give us [teachers] the opportunity to look at the pupils from a completely different perspective.*

(S5) *The task that gave me the greatest pleasure was a family picnic organized by the school. The most satisfying for me was making decorations with my students and talking to them during the picnic, when they did not feel intimidated by the presence of the teacher and talked freely about their interests.*

One of the tasks that the trainees found interesting or useful, referred to their participation in meetings of subject teams and teacher meetings, as well as observation of lessons:

(S6) *The second task that I found interesting was the meeting of the subject team. In my case it was the meeting of English teachers, of whom there are several in this school. During one of the meetings I was able to participate in the discussion about the new textbook, which was offered by one of the publishing houses. Teachers expressed their opinions about it and discussed the possibility of introducing it in the next school year. Listening to this conversation was extremely interesting to me, because I could find out what criteria are of importance to teachers when choosing a textbook, and how they view the possible changes to the textbooks they are currently using.*

(S7) *I was very happy to have the opportunity to attend different lessons because I had never been in the role of an observer before.*

(S8) *I never suspected that observing a lesson might be so interesting. It was amazing, first of all, to see the enthusiasm displayed by the children when they answered the teacher's questions.*

Another common element of almost all of the analysed reflections is the positive assessment of the school infrastructure by

students, as represented, for instance, by the following trainees' opinions:

> **(S9)** *Getting acquainted with the school infrastructure and the classroom equipment seemed to be an easy task and nothing new, but actually when I completed the task I realized how many changes had taken place in my school since I was a student there. I was impressed by the equipment purchased for the library and regretted that it was not available in the time when I learned there.*

> **(S10)** *I was shown around most of the school's classrooms, in which I had the opportunity to see the modern equipment that the school uses during the classes. Computers, projectors and multimedia boards are now available in almost every classroom, which makes conducting activities much more interesting and easier.*

The analysis of the above-mentioned statements shows that the trainees' have learned how important the teacher's active role is in organising school life. They are aware that some didactic and educational tasks do not cause undue hardship and that the teacher's work can be satisfying. The respondents express their satisfaction with the fact of expanding their pedagogical experience as well as the possibility of demonstrating their competences in school practice.

3.2.2. Tasks whose implementation the trainees found to be difficult

The following issues were assessed by the trainees as causing difficulty during the internship:

- cooperation with parents, meetings with parents;
- problems in relationships: teacher-student, teacher-parent, student-student, mentor-trainee;
- educational problems, such as maintaining discipline, dealing with pupil aggression;
- teacher's hallway duty;

- responsibility for the pupils' safety at school;
- lack of pupils' motivation to learn;
- difficulties in adapting requirements to students with special educational needs;
- knowledge of the educational law and the school documents;
- overwhelming multiplicity of documentation and administrative obligations;
- size of classes.

As can be noticed, several problematic areas can be distinguished, many of which are commonly found in the subject literature and outlined in the first part of the paper. The pre-service teachers report problems related to interaction and interpersonal relations with their own mentor, other teachers and parents. Another group of problems refers to educational issues such as maintaining discipline, ensuring pupil safety during classes, trips and a hall duty. Some trainees also admit to lacking sufficient knowledge of dealing with students with special educational needs and low-motivated learners. Furthermore, they, unsurprisingly, complain about their inability to deal with massive school documentation. Another concern voiced by a high number of trainees refers to the size of classes they were assigned to work with. They comment upon oversized classes (over 30 pupils) and perceived this as a serious obstacle to class management and provision of good quality education. Below several student statements are quoted to illustrate selected difficulties:

(S13) *As for the tasks that have caused me difficulties, it is certainly their planning and implementation of the form period* [lesson with a form-master]. *Admittedly, I did not teach such a lesson, however, I accompanied my teachers during their preparation, aimed at passing on some knowledge that is useful in everyday life.* [...] *The role of the teacher as an educator is to be a guide to such issues, which at first glance seem to be obvious, and yet it is not. The form period should be just such a lesson, during which all questions, doubts of students about the life issues should be resolved. In my opinion, this is not an easy task, as the teacher*

must have the knowledge of pedagogy, ethics or even psychology. Not to mention the fact that it should be up to date with all the new products that appear from time to time and which are important. The teacher has to take over the part of the parent's role here and take care to fill in the possible gaps in education in order to develop a proper moral attitude in the student, allowing for proper functioning in society. However, from my own experience I know that not all students treat such lessons seriously, often underestimating their role. This is quite demotivating, as the teacher makes every effort to bring this lesson to the greatest possible benefit, and yet the students cannot appreciate it.

Quite a noticeable number of pre-service teachers consider a teacher-parents meeting to be a big challenge due to the "communication difficulties in their mutual relations, parental claims and demanding attitudes as well as the amount of information to be conveyed at meetings". As one of the trainees commented, the teacher-parents meeting he or she attended, turned out to be "a very physically and mentally exhausting experience" for him or her. The sense of anxiety experienced by some student teachers is also manifested in the following observation:

(S14) *The meeting concerned the grades, behavior, absences and other problems of students. The difficulty was that I felt uncomfortable during this meeting, as I was a stranger there, and my parents became acquainted with their children's problems in my presence. Some of these problems were quite serious, which is why I felt self-conscious.*

The trainees are aware of the role of the teacher as a person who cares for the safety of students (especially younger) and they care about it. As one of the student teachers put it – he felt a "paralyzing sense of responsibility" throughout his practice. The trainees also wrote that telling students off for their "naughty behavior, running, shouting and littering in the school hall" during school breaks is a "very tiring and annoying" task. Their statements clearly signal their fear of

situations, cases requiring the need to negotiate behavioral changes, their inability to deal with lack of discipline or aggression on the part of pupils.

The respondents wrote about their own feelings such as fear (and a sense of responsibility for pupils' safety at school), anger and frustration (felt while experiencing students' disobedience and chaos), shame (for pupils' misbehavior in public places), a sense of insecurity (during conversations with pupils and parents), stress (in conflict situations, arguments and fights between pupils while assisting their school mentor on duty), discouragement (a sense of helplessness in situations with "no way out"). Some of the trainees considered the act of reading the school documentation as "tedious and exhausting" – they commented that they were terrified by the "mass of information, formality of the language used and the constant 'growth' school documentation".

Although a high number of the examined pre-service teachers consider performing extra-curricular activities to be a pleasant task, some admitted to having difficulty with them, which can be illustrated by the following statement:

> **(S15)** *Although this is not the most difficult task, it requires even more involvement from the teacher than during the lesson. He/she has to show a lot of creativity to encourage students to cooperate, and give them as many opportunities as possible to demonstrate and develop their skills.*

The above-mentioned problems experienced by the student teachers constitute at the same time an important signal for the academic mentors and teachers of didactic and psycho-pedagogical subjects as to what content knowledge should be taught to trainees before they actually enter the school practicum to minimise the number and scope of reported negative experiences.

4. Discussion of the findings

With reference to the study's major goal of exploring the
student teachers' views of their general pedagogy practice,
owing to the document analysis it was possible to identify their
attitudes to different aspects of this part of the practicum. The
researchers were able to establish the scope of knowledge and
skills that the trainees acquired during the internship as well
as to explore their way of thinking about schooling and their
own field experience. As emerges from the analysed portfolio
reflections, the student teachers enjoyed the chance to
acquaint themselves with the functioning of school as an
educational institution, the activities of the school canteen, the
common room and the library. They seemed to have par-
ticularly appreciated the opportunity to observe and assist in
conducting the form periods and extra-curricular activities,
teacher-parent meetings, school competitions, celebrations
and trips. The trainees also admitted that the internship
allowed them to recognize their strengths and weaknesses and
to check if they have predispositions for becoming good
teachers, which confirms Derenowski's (2015) and
Andrzejczak's (2002) observations about the practicum's role
in determining trainees' further professional plans.

   Clearly, our teacher trainees' internship constituted a form
of experiential learning (Kolb 1984) during which they
confronted their received (university) knowledge with
experiential knowledge gained during the internship. As the
researchers rightly assumed prior to the study, the trainees
expressed in their reports some words of disappointment at
their inability to apply the theoretical knowledge obtained
during the university education to the actual problematic
situations at school that they encountered. It is commendable,
however, that alongside these critical remarks, the trainees
briefly described a potential solution to dealing with such
difficulties. It implies they reflected upon the problems faced
during the internship and drew reasonable conclusions
enabling them to act differently should the same situation

appeared again. That also confirms their critical approach to their own actions and growth of their analytical skills to conceptualise the practicum experience.

It is worth reiterating that the trainees, whose reflections were studied, were in their first year of studies so their teaching practice took place after completing only one semester of their undergraduate studies. By the time they began their practice, they had attended only some of the lectures and classes devoted to the realisation of the pedagogical and psychological module. The other academic courses developing students' knowledge of pedagogy, psychology and didactics were planned for the subsequent semesters, so the trainees were, in fact, still at the beginning of their academic education. Quite predictably, therefore, the analysed student teachers' reflections were not very lengthy or lacking in in-depth analytical conclusions. The aim, however, of this first practical experience was merely to enhance trainees' awareness of the various dependencies, difficulties and possibilities of the teacher's work and from the analysis of the submitted reflections, it can certainly be inferred that this goal was achieved successfully. In addition, it needs to be emphasised that despite certain challenges met, all of the analysed trainees' reflections concluded with a positive final remark, confirming the usefulness of such practical pedagogical experience. It might, therefore, be safely assumed that their general pedagogy practice constituted an authentic and valuable learning experience.

As regards the second objective of the study, i.e. using the students' reflections as an evaluation tool for the way of organising the practice at the university, several useful conclusions were also reached. Firstly, the trainees' comments allowed the researchers to verify the usefulness and feasibility of the obligatory tasks designed by the team of university practicum coordinators. All of the trainees completed their "reflection task" and the reports were submitted as complete, which means the trainees gained sufficient information while fulfilling the tasks to expand their opinions on different

educational issues. Secondly, the trainees' statements generally contained positive remarks regarding the choice of tasks. Though there were a few reflections in which the trainees placed some critical comments as to the necessity to approach a certain task in the introduction to their reflection, they admitted they had changed their mind and came to the final conclusion that doing the task was, on the whole, useful for them and allowed them to restructure their subjective knowledge of a given aspect of the school's life.

Nearly in a half (45%) of the 65 students' reflections, different events were added to the lists of activities in Task 2. That implies that some students found it difficult to undertake the indicated 9 types of activities. As inferred from some of the trainees' comments, they were unable to attend a meeting with parents because either the head teacher refused to give them consent or their school mentor considered their presence could be uncomfortable for some parents. In other cases, some unpredictable educational situations took place at school and the trainees decided to participate in them because they appealed to them more than the ones listed. It might, therefore, be concluded that generally, the activities in Task 2, were largely feasible as the majority of students performed the 9 suggested ones successfully. Furthermore, it is evident that the trainees also responded favourably to the possibility of carrying out an educational activity of their own choice. One conclusion is that it is worth providing students with a choice in order to meet their preferences and a sense of autonomy as it increases their level of genuine engagement. This seems to have exerted a motivating and encouraging effect upon their general perception of the internship. All in all, it appears reasonable to include two types of tasks for student teachers to accomplish during their practicum – tasks indicated by university practicum coordinators as obligatory and tasks to be selected from a list, depending on the trainee's own preferences or the circumstances at the practice school.

Another remark relates to the way of documenting the realisation of the required tasks. The trainee's portfolio

containing the documentation i.e. the two tasks and the reflections – was to be submitted to the academic supervisor after finalising the internship. The trainees handed over the cards containing the list of activities in Task 1 and Task 2 with a set of the school mentor's signatures next to each performed activity. However, it remains uncertain whether the mentor's signature constitutes a sufficient form of confirmation of the student's completion of the task. On the one hand, the existence of the school mentors' signatures indicates that the proposed tasks have proved to be feasible, and on the other, there is little information as to the quality of the student's engagement and the level of achievement. It cannot be ruled out that in some cases the performance of the task was achieved in a superficial manner, meeting only the minimum expected standards of achievement. To prevent this possibility, a system of more specific assessment criteria of the trainee's contribution to the practicum probably needs to be designed in the coming years.

Overall, the pre-service teachers' reflections in the form of observations, remarks and doubts have acted as a useful springboard for discussions to be carried out during their ELT classes and allowed the teachers of pedagogical and didactic subjects to include elements of particular students' interest in their syllabuses. Another crucial benefit resulting from the fact that the trainees shared their reflections with regard to their practice is an important feedback the academic supervisors of the practice gained on the realities of contemporary primary schools in Poland, their genuine areas of concern and success.

Finally, several limitations of the presented research need to be acknowledged and addressed. The first limitation concerns the choice of qualitative approach in the study. Further studies are needed which will allow for using a quantitative research paradigm in investigating similar topics. At best, triangulation i.e. a combination of qualitative and quantitative methods of research might result in a more thorough analysis of the examined issues. The second limitation concerns the scale of the study as there were only 65 reflections analysed. It

is recommended that a larger population of students be subject to the study to arrive at more valid results. As explained earlier, however, other educators at the Institute of English and American Studies, Gdańsk University, have been involved in carrying out their own studies on various aspects of the teaching practice over the recent years. It is hoped that in the coming years, owing to the synergy of the joint practical efforts and the research findings obtained by all participants of the teaching practice team at the mentioned teacher training institution, the system of organisation of the teaching practicum will become considerably revitalised. Thirdly, the extent to which the obtained findings can be generalised is limited. Nonetheless, it is believed that the analysed material provides a basis for understanding the student teachers' views of their general pedagogy practice and of the level of feasibility of the tasks imposed on trainees during the internship.

5. Final remarks

Undeniably, further research is needed to explore various areas of the teaching practicum. In order to optimise the field experience and the quality of teacher education in general, better insights should, for instance, be gained into the student teachers' needs and perceptions of progress, their metaphors of teaching and learning, changes in their subjective theories, school mentors' preparation for mentoring, establishing partnerships between the school of the practicum and the university as well as defining the concept of effective teaching practice.

   It is the hope of the authors that the brief overview of some practicum-related themes included in the first part of this paper and the small-scale study results outlined in the second part will appear of value to educators engaged in the process of training teachers of English.

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