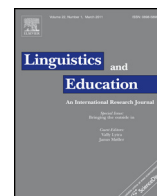




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## Introduction: Scales analysis, and its uses and prospects in educational linguistics

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## ABSTRACT

In this article, we survey the debates and questions relating to scalar approaches in the social sciences. Based on a critical review of emergent scholarship, we propose the adoption of scales as a category of practice, arguing that how scales are defined, their relationships conceived, and related to other social categories should be based on how people and institutions adopt scales in relation to their contexts and interests. Based on this position, we review the application of scales in educational linguistics and outline the questions that need to be further explored to make more constructive contributions to the appropriate unit of analysis, the relationship between context and language, and the connections between language and other semiotic resources in learning.

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Scalar analysis has made a significant entry into research in educational linguistics. We define educational linguistics as an interdisciplinary field, situated in the interface of education and linguistics, and which adopts linguistic tools to address language-related concerns in educational settings (Hornberger & Hult, 2006; Spolsky & Hult, 2008; van Lier, 1994). It draws from the work of scholars in sociolinguistics, psycholinguistics, and applied linguistics who make applications to education from their research and scholarship. As scholars in this tradition have widely acknowledged, they have borrowed scalar metaphors from developments in geography and political science (Blommaert, Westinen, & Leppänen, 2015, p. 120). Though scalar analysis began around the 1980s in geography, its use in educational linguistics is only a decade long. Scalar analysis answers some significant conceptual problems educational linguists have identified, relating to the appropriate unit of analysis, the relationship between context and language, and the connections between language and other semiotic resources in learning. While recent studies in educational linguistics have opened up very useful applications of scales on language use and competence, its increasing prominence has also generated skepticism among scholars on its proper use and scope. The purpose of this Special Issue is to feature the current research of leading scholars adopting a scales approach, take stock of its contributions, explore how scales can inform educational linguistics, and identify significant emerging questions for future inquiry.

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## A look back

Scalar analysis is not without controversy in the disciplines we borrowed it from. There is considerable reflexivity about the uses of scales, and a burgeoning meta-discourse on their definitions and approaches among geographers (see debates in Brenner, 2011; Moore, 2008; Marston, Jones, & Woodward, 2005; Samers, 2011). It is useful for educational linguists to listen to these conversations in order to clarify the uses of scalar analysis in their own discipline. We may also identify the ways in which scholars in educational linguistics might offer modes of analysis that enhance the value and application of scales, rather than being positioned in a dependent relationship to social sciences.

Scalar analysis began in the 1980s with the entry of globalization discourses into social sciences. World Systems perspective, for example, theorized how diverse nations and regions were integrated into a geopolitical network, motivating the need to change our unit of analysis to larger frames beyond the local and the immediate (see Frank, 1969; Wallerstein, 1991). As this mode of analysis continued, it also generated a realization that the global/local relationship is not deterministic. Rather than the global shaping the local, the local can renegotiate the global, as both scales interpenetrate each other in subtle and fluid ways. With the emergence of discourses and practices of neoliberalism and transnational relations, we are even more cognizant of the ways in which diverse social spaces are rescaled in relation to economic activity, labor practices, mobility, and new forms of governance (see Caglar & Glick-Schiller, 2011). Scalar analysis has offered social scientists productive conceptual tools for studying these changing processes and institutions. It offers the possibility of going beyond the dominance of structuralist paradigms (which reduce social life to master narratives, unidirectional cause/effect analysis, static relationships, and deterministic macro-level structures) and adopt rhizomatic models (e.g., Deleuze & Guattari, 1987) to consider the constant reconstitution of scales, generation of new scalar relationships, fluid connections between scales and other social and material constructs, unpredictable cause/effect relationships, and changing configurations of social processes and practices.

Despite scalar analysis addressing emerging analytical needs in response to changing geopolitical relations, and after three decades of productive analysis, geographers have now paused for critical reflection on the relevance and definition of scales. Marston et al. (2005) have recently argued that geographers should abandon scales because of their theoretical imprecision and an undesirable imposition of hierarchical and value-laden modes of analysis. We summarize the emerging questions as they are reflected in the social scientific literature and suggest possible ways in which we can resolve these debates for using scales in more constructive ways in educational linguistics.

The following are the main questions generating controversy:

- *How do we define scales?* Are they based on character, scope, influence, or size? In other words, is the “global” a higher order of scale compared to the local because it covers more time and space (scope), it includes numerically more people and institutions (size), it is more abstract in composition than the concreteness of the local (character), or it is more determinative in shaping the outcome of other scales (influence)?
- *Are scales predefined?* Some geographers have used scales such as global, national, and urban as categories that are already available to begin their analysis (see Moore, 2008 for a review). Others have questioned if these scales can be decided a priori (Brenner, 2011). Perhaps those who begin with predefined scales follow the structuralist orientation of adopting abstract patterns that stand in complementary and contrastive relationship to each other.
- *What is the ontology of scales?* There is an understanding among some that scales are objective, material, and “real” (see for a review, Moore, 2008). This assumption is partly exacerbated by the slippage between scales and social spaces in some traditions of analysis. The equation of scale as a territory (i.e., region, city, or nation) influences scholars to think of scale as an objective material entity. However, it is more useful to separate scales from objective material entities and keep them open to framing places/spaces and time in diverse ways in relation to the interests and histories of different social groups. Scales are epistemological constructs that help scholars and communities to understand, interpret, and/or define social life. However, scholars in the tradition of “critical realism” have argued that once constructed scales have “real” implications, with institutions and spaces configured in concomitant ways, which then shape other institutions, people, and objects (Brenner, 2011; Moore, 2008). In other words, it is possible to recognize the social and material effects of scales without treating them as material entities.
- *Are scales a category of analysis or a category of practice?* If scales are epistemological constructs, do they belong to analysts (researchers) to provide them a handle on reality, or should they be negotiated and co-constructed with the social actors with whom the analysts collaborate with and conduct research on? If it is the former case, and many scholars do start with scales to facilitate their studies for analytical convenience, there is the danger that scalar grids will be imposed on the subjects and institutions under their consideration. Though these scales may be helpful for researchers, they may or may not be consequential to the people or social processes being studied. Moore (2008) has made a persuasive argument for treating scales as a category of practice. This orientation means that scholars would define and adopt scales as they emerge from the practices of people and institutions. Such an orientation would ensure that these constructs are not an unfair imposition on and skewed interpretation of the social practices and processes being studied, leading to distorted perspectives. (The notion category of practice has other implications, which we will discuss below.)
- *Are scales hierarchical or flat?* Marston et al. (2005) have critiqued the implicit assumption in many studies that scales relate to each other in hierarchical ways — as in the understanding that the global is more powerful than the national or local, and determines the character of smaller scales. Influenced by poststructuralist orientations, they have argued for a “flat

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