Quechua Education in Peru:
The Theory-Context Mergence Approach

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Executive Summary

Education offered in the Quechua language has long been an issue of debate in Peru, and progress on the issue has been impeded by deep-seated cultural prejudices. Effective education programs offered in Quechua would lift up a marginalized sector of Peruvian society, as well as create opportunities for development and provide a stepping stone toward Spanish literacy for Quechua monolinguals. This study examines the obstacles to these programs and makes proposals for what would be the most effective policies to implement such programs. However, in acknowledging that education does not exist in a vacuum, the paper also identifies strategies relating to politics, culture, and community empowerment to make Quechua education successful in practice.

To do so, the paper analyzes modern theories on multilingual education and language planning, and examines language movements from around the world to develop a theory for ideal Quechua education. It then identifies the limits that culture, politics, and resources place on implementation and adjusts the theory to merge with these realities. The findings of this paper advocate combining concepts of top-down government planning with bottom-up local empowerment strategies.

Policies proposed include the creation of an official standard Quechua, bilingual instruction that incrementally introduces Spanish in predominantly Quechua-speaking areas, and the establishment of more space for the public use of Quechua. Bottom-up strategies proposed include the cultivation of literature and media in Quechua, as well as encouragement of community-run education projects.

Background

Importance of Quechua Education

Before launching into a complex explanation of the most effective way to implement Quechua education in Peru, it is important to first explain why effective Quechua education ought to be implemented. The most sentimental answer, and perhaps the first that comes to mind, is that Quechua is one of Peru's pieces of great cultural heritage and Quechua language education serves as a way to maintain that. There are many other reasons, however, to support these types of programs that strike a more practical chord. In general, education and literacy lead to a more capable workforce and better-informed democratic citizenry. It is in Peru's best interest to develop its human capital, especially if doing so in its most impoverished communities means potential for major poverty reduction.

Increased prominence of the Quechua language will also empower Quechua-speaking communities, and greater literacy levels will aid communication as well as social participation and the ability of Quechua speakers to self-identify as part of a non-stigmatized group. As Hornberger puts it in her *Quechua Literacy and Empowerment in Peru*, "Promotion of Quechua literacy increases the potential for full literate development and fuller social participation of hitherto marginalized sectors of Peruvian society" (215). All of this, along with the creation of greater opportunities for development in rural communities, could also begin to stem or even reverse the drain of poor rural migrants to the cities of the coast, especially Lima, where shanty towns and the number of incoming migrants are of increasing concern.

Critics of a multilingual approach often argue that it is counterproductive to spend resources teaching Quechua in a predominantly Spanish-speaking country, which is, in turn, in a predominantly Spanish-speaking region, where Spanish (or sometimes English) is the preferred language of business, politics, media, and cross-cultural communication. These critics overlook the fact that Quechua education does not necessarily preclude Spanish education, and may indeed help with it. In the case of literacy, Quechua can serve as a steppingstone to Spanish. This is because it is easier to teach someone to develop from being an illiterate monolingual Quechua speaker, to a literate monolingual Quechua speaker and then to a literate bilingual Quechua/Spanish speaker, rather than straight from an illiterate Quechua speaker to being a literate bilingual.

Concerning National Unity

Here it is also important to address the question of national unity. While many Peruvians do not contend the importance of diversity and cultural heritage, some would be concerned that an upsurge in the use of the Quechua language might lead to greater calls for autonomy along with disunity between the predominantly Spanish and Quechua-speaking parts of the country. There are two "easy outs" to diffuse this concern, neither of which this paper will try to argue, but they are worth considering. The first is that Peruvian citizens should recognize that the homogenous, "monolingual state [is] largely impossible in an age of migration" (Tollefson 7) and, therefore, it is in their best interest to learn how to deal now with these issues in an effective manner. Second, one could argue that there is nothing wrong with disunity. It would be quite valid to suggest that the non-Francophone parts of Canada, for example, have endured no more trouble from

allowing Quebec a good degree of autonomy than they would have from forcing the Quebecois to assimilate to the majority language and culture.

The fact of the matter is that disunity will always be a risk when there are two or more large ethno-linguistic groups within the same country. However, in the case of Peru, the country is already divided between the wealthier, developed, Spanish-speaking cities of the coast and the rural, under-educated, multilingual communities of the interior. Therefore, providing education is the first step towards bringing the marginalized parts of the country into greater integration with the rest, and as explained earlier under "The Importance of Quechua Education," there are plenty of reasons it ought to be provided in Quechua. Education has the potential to create better opportunities for development, creating economic ties, better educated and informed citizens, increasing political involvement and integration, and bilingual Quechua-Spanish education has the potential to facilitate communication and exchange between regions. In this way, Quechua education should be viewed in light of its potential as a uniting force, rather than a dividing one.

Why Quechua?

Peru, in fact, is home to a myriad of different languages apart from Spanish and Quechua. The total estimated number of languages spoken in Peru can vary greatly, mostly because there are an unknown number of uncontacted indigenous communities in the Amazon region. According to *Ethnologue*, a publication of SIL International, there are ninety-three known languages listed in Peru as still living (Gordon n. pag.). Like Quechua, most are indigenous languages seeing a decrease in the number of speakers and are languages that have little economic, political or cultural support to ensure their future

survival. Therefore, an explanation is warranted as to why Quechua has been chosen as the focus of this study and not Aymara, for example, Peru's second most widely spoken native language, or simply all of Peru's indigenous languages in general. The answer boils down to practicality.

There are between 3.5 to 4.4 million speakers of Quechua in Peru (Gordon n. pag.), and about seven million across the Andean region (Lewis and Redish n. pag.). Aymara, on the other hand, is estimated at 441,743 speakers in Peru as of 2000 (Gordon n. pag.), with approximately 1.6 million speakers internationally ("Aymara Uta" n. pag.). The majority of the many other minor languages of Peru are scattered throughout the Amazon, with less than a million speakers each, and do not have the visibility of Quechua nor the prominence. Beyond simply putting Quechua far above other native Peruvian languages in terms of utility, the aforementioned number of speakers positions Quechua as the most spoken indigenous language in the Americas (McCarty 145).

Furthermore, of the indigenous languages, Quechua has the oldest legal tradition as a state-recognized official language in Peru, as well as the strongest reputation in terms of representing Peru's cultural heritage. Quechua is well known as the language of the ancient Incas and a historic *lingua franca*, which adds legitimacy to its status as a language worth cultivating. There also exist more developed and widespread state apparatuses for implementing Quechua education programs, and a larger body of scholarly research on Quechua than there are for any other indigenous language in Peru. Therefore, it is most practical for the purposes of this study to address solely the issues regarding Quechua language education and not other minority languages spoken within the nation of Peru.

Linguistic Background

Now that the reason for writing about Quechua has been established, it is necessary to discuss some of the linguistic elements of the language, both to dispel misconceived notions and to point out some of the basic challenges that working with Quechua poses. First and most important to understand is that Quechua is not monolithic. That is to say, there is no single Quechua language. Rather, Quechua is best described as a dialect chain stretching across various countries and regions. This means that speakers of regional dialects are likely to understand other dialects from regions near to them, but their speech may not be mutually intelligible with more distant varieties (Lewis and Redish n. pag.).

In fact, *Ethnologue* identifies forty-six different varieties of Quechua, spanning across parts of Chile, Argentina, Bolivia, Peru, Ecuador, and even Colombia. For the purposes of this paper, only the varieties spoken within Peru are of necessary consideration, but this still represents thirty-two of the forty-six varieties, and the vast majority of Quechua speakers (Gordon n. pag.). Furthermore, it is important to note that the regional differences in spoken Quechua do not just include differences in pronunciation and vocabulary, but also disparities in grammar (Heggarty n. pag.). Obviously, these facts alone would present challenges for the implementation of Quechua education, before even considering the obstacles posed by culture, politics and resource constraints.

Obstacles

Cultural Status

While the number of Quechua speakers in South America, approximately twice the number of Norwegian speakers in the world for example (Gordon n. pag.), might lead one to believe that it is not a threatened language, the cultural context reveals a deeper story. Despite its active community of speakers, Quechua has seen repression and social subordination to Spanish for most of its history since the arrival of the Spanish conquistadors (see "History and Current Law"). Quechua today is still very much associated with the rural, uneducated poor (Hornberger and King, "Reversing Quechua Language Shift" 167) and multilingualism is seen to impede modernization and national development (Godenzzi 237).

Indeed, these views have been so ingrained in the minds of the public, that many Quechua speakers living on the coast are ashamed to admit that they do in fact speak Quechua, even if they still speak it in their homes. Interviews have proven that many lie about it, even though factors like accent and idiomatic usage are still likely to give it away (Hornberger, "Bilingual Education" 81-3). Still, Hornberger's interviews and experiences in Quechua-speaking communities suggest that Quechua is still valued, but community members take a very practical perspective regarding the Spanish and Quechua languages. Interviews conducted pointed to the conclusion that communities did not lean strongly in any direction on the question of which language was more "beautiful," however Spanish was widely chosen as more "important" (Hornberger, "Bilingual Education" 86-87).

Politics

The politics of Peru have also traditionally been an obstacle to the advancement of Quechua education. In the past, there have been populist leaders supporting indigenous rights, like Víctor Raúl Haya de la Torre or General Juan Velasco Alvarado. However, they have been either repeatedly barred from assuming power, as with Haya de la Torre ("Víctor Raúl Haya de la Torre" n. pag.), or have quickly lost support after making bold pushes for reform in this area, as was the case with Velasco (see "History and Current Law"). The formal politics of Peru have traditionally been controlled by the upper class Spanish-speaking elite, whose views on multilingualism are largely inherited from the Spanish colonial mindset. Even when this exclusive club was crashed by the election to president of the non-European political outsider Alberto Fujimori, the newly elected president followed generally orthodox policies and asked "cholos [to] forget their collective battles and instead struggle individually against poverty by becoming microentrepreneurs" (Cadena 12).

On the other hand, there have been signs of change in the political landscape, which auger well for the future of bilingual education. Former president Alejandro Toledo crafted a political image for himself based on his Quechua roots, raising the public status of Quechua culture and helping dent the perception that Quechua customs are incompatible with social mobility and modernity (Cadena 12). More recently, two Peruvian congresswomen, Hilaria Supa and Maria Sumire have made waves by insisting on speaking to the legislature in Quechua. This has forced the rest of Peru's congress to hire translators. Although the practice appears confrontational or gimmicky to some, it is forcing more public acceptance of Quechua. This, along with developments like the

launching of a Quechua version of the Google search engine, point to shifting perceptions on the use of indigenous languages ("Google it in Quechua" n. pag.).

Resource Restraints

The third major obstacle to implementation of comprehensive education programs is the lack of resources that faces the Peruvian government in general and rural communities specifically. While it may sometimes be possible to improvise a communal space to be used as a school, the "two great needs" of such programs remain: materials and teachers (Hornberger, "Language Planning" 359). The fact that many Quechua speaking communities are poor, isolated, and rural compounds the issue since it would be difficult to lobby the government for support even if the government's commitment to rural education were not so lukewarm. Thus these issues have mainly been addressed (when they have been addressed) by bottom-up action on the part of local communities and organizations. Lending support to such local movements remains the best way to overcome resource restraints in areas where the central government is a distant or nonexistent actor (Hornberger, "Language Planning" 359-360).

History and Current Law

Colonization

Quechua has been spoken for hundred of years, existing alongside other Amerindian languages in the central coast and highlands of Peru as of the year 500 A.D. Use of the language spread to the north and south as Quechua-speaking communities grew in power, eventually becoming the official language of the Inca empire by the fourteenth and fifteenth centuries (Godenzzi 238). After the arrival of the Spanish, there was a very short-lived period when Quechua was used as a *lingua franca* by both Spaniards and native Peruvians (Hornberger and King, "Reversing Quechua Language Shift" 166). Subordination of Amerindian languages to Spanish began early on, but during this period Quechua maintained relevancy for the sake of governmental administration and Christian evangelization (Godenzzi 238).

The second half of the eighteenth century, however, began to see even more proactive repression of indigenous languages. A royal decree from Spain called for the "compulsory Castilianisation" of the indigenous peoples in the New World (Hornberger and King, "Reversing Quechua Language Shift" 166). From that time onward, Spanish continued its climb as the language of prestige and power, spreading in its use across all parts of Peruvian society. At the same time, indigenous languages were further stigmatized and denigrated, leading many indigenous Peruvians to learn Spanish, the dominant language, for the sake of social survival and integration. This was the case despite the fact that most systematic attempts to instruct Spanish to the indigenous population were ineffective (Hornberger and King "Reversing Quechua Language Shift" 166-167).

The Velasco Revolution

The sociolinguistic trends begun under colonization did not end with Peru's independence from Spain, and it was only with the advent of the Velasco Revolution in the late nineteen-sixties and early nineteen-seventies that Quechua saw its first signs of revitalization. Under the military government of Juan Velasco Alvarado, the Education Reform of 1972 was put into motion. It advocated bilingual education in an attempt to obtain "the full participation of all members of the society" (Hornberger "Five Vowels or Three?" 189).

Velasco's plan for implementing this bold reform involved the decentralization of education, placing responsibility on the shoulders of indigenous community leaders, teachers, and parents to develop and carry out their local education programs. Such local control was to be achieved through the establishment of institutions called community education nuclei (NECs), which were organized and run by the local leadership and supported by regional government agencies. One of the underlying themes of Velasco's strategy was attempting to foster confidence and self-sufficiency in peasant and indigenous communities (García 75).

This was soon followed by other laws legally strengthening the position of the Quechua language. The National Policy of Bilingual Education of 1972 called for bilingual education in all areas of the country where languages other than Spanish were spoken, and in 1975 a law was passed making the Quechua language officially co-equal with Spanish on a national level (García 75). Passed on May 27 of 1975, law 21156 elevated Quechua to national status, mandating that after April 1976 Quechua instruction

would be obligatory across all levels of education in the Republic, and also established 1977 as the year in which courts would be required to use the language if one of the parties involved only spoke Quechua (Powers 152). A Quechua commission was established, which developed a basic alphabet for use in Peru and published six dictionary-grammar sets according to the main different varieties of Quechua identified by the government (Hornberger "Five Vowels or Three?" 189).

The 1975 law specifically targeted the two areas most used as arenas for linguistic subordination: the schools and the courts. In doing so, it established Quechua as a legal equal to Spanish in the eyes of the state, making Peru the first country to officialize an indigenous language in Latin America. It also created a strong backlash against General Velasco among Peruvians of European descent living on the coast, especially the middle to upper-class society in Lima. Along with his failing health, discontent with Velasco's ambitious language reforms helped lead to his intra-regime replacement by Francisco Morales Bermúdez later in 1975 (García 76).

"Phase 2"

Under Bermúdez, Peru began what became known as "Phase 2" of the Revolutionary Government, which involved dismantling many of the programs set up by Velasco. A new constitution was drafted in 1979 that took a step back from the elevated position that Velasco-era reforms had bestowed upon the Quechua language. Instead of national official status, the new constitution changed the law to make Quechua "a language of official use in the areas and in the way that the Law mandates." The actual law that would mandate these things, however, was never created (García 76). In

contrast, other indigenous languages were simply declared the "cultural patrimony of the

nation" (Hornberger "Five Vowels or Three?" 189).

The Turbulent 1980's

The rise of Sendero Luminoso did not aid rural communities and the indigenous

language movement, but some gains were still made during the turbulent 1980's in Peru.

Indigenous and rural peasant communities found themselves caught between the

activities of the government and Sendero Luminoso. Schools, which were the main

gateways to linguistic revitalization for Peru's minority languages, fell under mistrust by

the government since much of Sendero Lumino's leadership and support rose out of the

nation's public schools and universities (García 76). Some important developments still

emerged at this time though, mostly under the first presidency of Alan García. For

example, the Quechua alphabets were officially sanctioned in 1985, and 1987 saw the

reinstatement of the formerly inactive Department of Bilingual Education (García 77).

The 1993 Constitution

The new (and current) constitution of 1993 built further on some of the advances

made under García, although its treatment of the Quechua language left some ambiguities

and actual improvements in practice were have been pursued only half-heartedly for most

of the past two decades. Article 48 of the constitution, the only article that refers directly

to the Quechua language states: "Son idiomas oficiales el castellano y, en las zonas donde

predominen, también lo son el quechua, el aimara y las demás lenguas aborígenes, según

la ley" ("Constitución Política del Perú 1993"). The wording is slightly bolder than that

of the 1979 constitution, stating that Quechua (along with all other aboriginal languages)

is official in zones where it predominates. Here again, however, the constitution's

statement of "according to the law" leaves ambiguity since it is not stated which law exactly is applicable ("Ley Nacional de Lenguas" 1).

The second paragraph of article 2, clause 19 of the constitution states that every Peruvian has the right to use his or her language before whatever authority through an interpreter ("Constitución Política del Perú 1993"). While clearly a noble aim, speakers of indigenous languages can hardly be found at the level of the country's public administration to actually make this a practical reality ("Ley Nacional de Lenguas" 1). Therefore, despite statements of the government's commitment to indigenous languages, the current constitution is rather weak in its provisions, continuing a tradition of general indifference and inaction on the part of Peru's national government. Few if any official measures have actually been implemented to apply the supposed support for bilingual education in Peru (Hornberger and López 207).

Theories on Education and Language Planning

Terms and Definitions

Corpus planning: "efforts to affect the structure of language varieties, and includes processes such as standardization, graphization, purification, and terminology development" (Tollefson 3).

Status planning: "efforts to affect the status of language varieties – which varieties should be used in government, the media, the courts, schools, and elsewhere?" (Tollefson 3).

Acquisition Planning: efforts to affect the acquisition of language varieties, through different educational practices for the purpose of cultivation, reacquisition, or maintenance of a language (McCarty 143, and Paulston and Heidemann 293).

L1: a student's first language.

L2: a student's second language (or target second language).

Diglossia: "a conflictive social situation in which one or more linguistic varieties are subordinated to another which enjoys greater social prestige in terms of the functions which it fulfills in a particular society" (Hornberger, "Five Vowels or Three" 188-9).

Standard language ideology: "bias toward an abstract, idealized homogenous spoken language, which is imposed and maintained by dominant bloc institutions and which names as its model the written language, but which drawn primarily from the spoken language of the upper middle class" (Lippi-Green 64).

'One way' immersion: immersion education taught entirely in one language for the sake of acquiring that language, and generally not intended for students for whom the language of instruction is their first language (Fortune and Tedick 7-11).

'Two way' immersion: immersion education taught partly in a majority language and partly in a minority language, consisting of integrated students whose first language background is likewise mixed, for the purpose of acquiring bilingual proficiency in both groups (Fortune and Tedick 7-11).

Indigenous immersion: immersion education taught in a native language to speakers (or children of speakers) of that native language for the purpose of renewing "a sense of ethnic identity and empowerment through revitalization of endangered and formerly oppressed Native languages and cultures" (Fortune and Tedick 11). Indigenous immersion need not be in just one-way immersion settings (Fortune and Tedick 7-9).

Ends-means approach: model of curriculum development "formulated in terms of scientific assessment of learners' language needs in relation to societal institutions"

(Auerbach 13). This is in opposition to an organic approach based on student-determined needs, topics and issues (15).

Monolingual vs. Bilingual Instruction

Studies on second language acquisition have examined the effectiveness of monolingual instruction in only the target language versus bilingual instruction with some level of students' first language use. The widely accepted approach for acquisition of L2 has been monolingual instruction in the target language, based on theories of one-way immersion. The rationale is that students learn a second language the fastest when they are forced to use it. Sometimes minor punishments are even advocated in response to L1 use in the classroom. There are some caveats to this belief that have emerged over time, however. The first is that immersion research focuses on acquisition among children, and therefore may be significantly less effective if the students are adults (Auerbach 25).

Second, it has been found that monolingual programs are significantly more effective for learners whose L1 is socially dominant and well-supported, while bilingual instruction yields better results among language minority students. Lastly, research has shown that strong literacy and schooling in a student's L1 has a clear positive effect on the student's L2 acquisition. Students lacking a strong literacy or educational background become frustrated easily and then marginalized in a monolingual immersion setting, leading to high dropout rates (Auerbach 25). Students in such situations have made statements like, "I am always lost," and "I waste my time" (26).

Materials Used

Auerbach brings up a number of useful points regarding the selection of materials in acquisition planning. The questions arise of "who decides what materials should be used? On what basis are they selected? Who wrote them and for what purpose? Whose voice do they represent? How is their content related to the reality of students' lives? What are students asked to do with them? What kinds of responses are expected?" (20). He then challenges the basic assumption that it is the teacher's job to select the materials. More modern educational theories suggest that excluding students from the selection and evaluation of materials can actually be detrimental to the effectiveness of the education. It reinforces the concept that "if there are problems, they probably lie with the students," rather than the possibility that the texts are inappropriate because they do not relate to the experiences of the students and are uninteresting (21).

Furthermore, this type of approach creates the goal of covering the material rather than achieving what is important or useful for the students. Evaluation in these cases, while striving to be objective in measurement, ends up being subjective in terms of the students' sense of accomplishment. Theories on student-driven curriculum suggest that language education is most effective when it focuses on using language to create new meanings and share information, opinions, and ideas, which is usually the reason students want to learn the language in the first place. This is in opposition to the tendency of material-driven curriculum, which is to focus on practicing correct forms. Therefore, textbooks and teacher-planned lessons still have a place in the student-driven classroom, but only as long as they provide space for the type of creative exchange that is most valuable to students' practical language acquisition (Auerbach 21-2).

Purism and Use of Vernacular

       Much debate is placed on necessity for linguistic purism when discussing corpus planning for a particular language. Purism seeks to purge a language of loan words, code switching, and influence from other languages to create a "pure" version of the language for instruction. Often it is associated with nationalist or ethnonationalist movements, which means that purism is often championed by politically and historically-minded "Essentialist" language planners who are sensitive to the symbolism of language (see "Paraguay" under "Outside Cases"). Purism therefore acts as a form of resistance against traditionally dominant languages, but there is evidence that it can be quite counterproductive to effective language acquisition. Canagarajah points out that purist ideals disempower vernacular forms spoken in everyday contexts, making a "purified" language less suitable as a medium for contemporary purposes (159).

       Even if purism does not hold sway in the development of a standard language for instruction, there are likely to be many vernacular forms that do not conform to the standard. What then is the best policy regarding the use of vernacular in classrooms? The conventional wisdom has been that vernacular forms should have no role in language instruction because they necessarily obstruct the students' acquisition of the standard form. This is reinforced by the fact that nonstandard varieties are often stigmatized or looked down upon (Tollefson 6).

       Tollefson, however, provides evidence that the use of nonstandard varieties in the classroom actually helps students' acquisition of the standard form. In fact, it increases participation, self-esteem, performance on tests, and overall academic achievement of students. He further points out that use of students' vernaculars provides significant

advantages in bilingual education environments as well (6-7). This runs parallel to the findings presented in this paper on the effectiveness of monolingual and bilingual immersion policies (see "Monolingual vs. Bilingual Instruction" above).

Domains of Use

Part of status planning includes deciding in what domains of society a language will be promoted for use. Many minority languages exist in a diglossic situation in which the dominant language is used in all public domains and the minority language is reserved for use in the home. Some language movements have attempted to employ a separation of domains as a strategy in their status planning efforts. That is to say, the leaders of these movements hoped to maintain the prominence of their language through preserving the language for in-group usage, while allowing the dominant language to continue in its functions as the de facto language of public domains. The problem with this, as Canagarajah points out, is that it writes inequality into education policy, reducing the status of the language while limiting its utility and preventing its spread into other "institutionalized functions" (159).

Standardization

Questions about language standardization play a large role in corpus planning efforts. On the one hand, standardization makes curricula easier to develop, implement, and monitor, which is essential for comprehensive education policies. It also resolves issues about language dialects and variations used in media and publications, and theoretically breaks down barriers in the long run to communication between different vernacular variations. On the other hand, actually choosing a standard raises all sorts of

issues of its own. How will the standard be created? Will one dialect be chosen over others, and what will the political implications of that be? Will diglossia emerge between older speakers of vernacular forms and younger educated speakers using the standard?

Hornberger and King investigate these issues in their investigation of Quechua speakers in Ecuador and Bolivia. Their study concludes that standardization and unification efforts have a positive effect on language revitalization, although they require short to medium-term adjustments. They state that the nationally standardized varieties in both Ecuador and Bolivia "are still in the process of being disseminated and negotiated among the speakers" ("Quechua Language Revitalization" 311-2).

Outside Cases

This section briefly examines the experiences of other language movements throughout the world and compares them with the Peruvian context to gain a better understanding of what strategies have and have not worked and which might be useful for purposes of Quechua education planning. There are a plethora of examples of language movements and country policies that could have been included in this investigation, although for the sake of practicality only a handful are examined here. They were chosen for this paper as they each highlight a different aspect of educational and sociolinguistic strategy useful for the focus of this study.

Bolivia

Bolivia presents an especially useful case study as a country with many similarities to Peru. Not only does Bolivia have a similar culture and colonial legacy, it also has a large number of citizens of indigenous descent, most of whom speak a language other than the traditionally dominant Spanish. In fact, around 60% of Bolivians speak at least one indigenous language (López 241) and there are over two million Quechua speakers in the country according to *Ethnologue* (Gordon n. pag.). As in Peru, government policy on language was very ambiguous in the early period of colonialism, before later officially adopting Spanish monolingualism and banning indigenous languages from schools – a practice that lasted through most of the twentieth century (Luykx 43-4).

Many indigenous people, however, began organizing clandestine educational networks as early as the late 1700's (Luykx 44). Another early development, surprisingly, was literacy spread through the military. In 1907, obligatory military service was

established and the long conscription periods were officially justified through the

military's provision of reading and writing instruction (45). It was not until the 1960's

and 70's, however, that attempts at bilingual education first began to emerge, mainly

spearheaded by outside organizations like the Summer Institute of Linguistics and

USAID. Still, government policy was neither comprehensive nor consistent during this

period, and the focus was still on moving students quickly into Spanish-taught classes

(48).

Policies began to be more coordinated starting in the 1990's with the creation of

the *Proyecto de Educación Intercultural Bilingüe* and subsequent reforms, but the

underlying aim of schooling was still slow to change (Luykx 49). As in the past, the most

effective education projects came from action on the local level. Between 1990 and 1995,

an alliance of the national peasant union, indigenous organizations and the rural teachers'

union approached UNICEF and the Bolivian Ministry of Education to design an

education project, select the teachers and professionals to participate in it, and exercise

control over the activities of the government and the teachers in the community. The

project was a huge success and was written into the new educational reform law of 1996,

which incorporated all of Bolivia's rural schools (López 248).

Bolivia has since introduced materials and curricula for Quechua, Aymara, and

Guaraní, its three most widely spoken languages (López 248). Even more recently, under

Evo Morales, the current Bolivian president, the government has embarked on a mission

to raise indigenous culture to higher levels of prestige and has implemented an intense

push for language training in public schools and government offices. This also includes

measures to raise the prominence of indigenous languages in urban settings, which have

traditionally been Spanish strongholds. The reforms are being met with intense resistance and fear in certain parts of the country. Despite government assurances, many Spanish speakers believe Morales wishes to entirely displace Spanish with indigenous languages and this has led to mistrust, riots, and political deadlocks, which have jeopardized various reform initiatives set forth by Morales (Reel n. pag.).

Paraguay

The Paraguayan Guaraní language is an interesting case since it managed to maintain majority status in Paraguay even while being considered the subordinate language to Spanish. In fact, the population is around 40% monolingual in Guaraní and 50% bilingual (Gynan n. pag.). Still, Guaraní was not made an official language alongside Spanish until 1992 and was not used as a language of instruction in schools until 1996 ("Guaraní Language" n. pag.). The speakers of Paraguayan Guaraní number around 4.6 million, while there are around 7 million Guaraní speakers in general across the countries of Argentina, Paraguay, Brazil, and Bolivia (Gordon n. pag.).

Because Guaraní has such a strong base of speakers in Paraguay, it is not as useful for comparison as some of the other languages and policies examined here, however a few things are worth noting concerning the fact that Guaraní has survived so well even under Spanish oppression. The first is that a writing system and literacy instruction was propagated early on, mainly by Jesuits in the beginning of the 1600's, which led to Guaraní literature being produced fairly early, compared with other Amerindian languages. Even before independence, the Jesuits had developed a single general language of Guaraní out of the various dialects spoken in the country (Fernández n. pag.).

The second important note is that despite various nationalistic movements for Guaraní purism, the vast majority of the population speaks either Spanish with heavy Guaraní influence and use of loan words, or Guaraní with heavy Spanish influence and use of loan words and code-switching. The latter is referred to as *jopara*, which is actually spoken by the majority of Guaraní bilinguals in Paraguay. There is an ongoing debate in Paraguay between sociolinguistic language planners, who favor using *jopara* in a process of transitional bilingual education (TBE) until grade three to facilitate the classroom transition to Spanish, and "Essentialist" language planners, who favor Guaraní purism using two-way maintenance bilingual education (Fernández n. pag.). Still, it certainly seems probable that the flexibility of Guaraní and its ability to mix with Spanish may have contributed to its continuing robustness to the present day. This would support the theory that linguistic purism is counterproductive to language revival (Canagarajah 159) and should be kept in mind when thinking about Quechua education.

Ireland

The Irish Gaelic movement holds some useful lessons on language revival, both positive and negative. The situation of Irish Gaelic also holds a number of historical similarities to Quechua that may not be obvious at first glance. Much like Quechua today, the Irish-speaking population in the late nineteenth century (around the start of major revival efforts) had dropped to thirteen percent (MacMathúna 52). In further comparison, Irish Gaelic has been denigrated for centuries and was banned from public and administrative use under the rule of a foreign force – in this case by the English in the late seventeenth century. Also as in the Peruvian case, Irish Gaelic survived mainly in rural areas and among some working class communities in larger towns, while many members

of the Irish-speaking community discarded their language and traditional customs to obtain greater upward mobility ("The Irish Language: History" n. pag.).

Efforts to revive the language first gained traction in the late 1800's with the formation of the Society for the Preservation of the Irish Language (SPIL) in 1876. The Society enlisted a strategy of promoting the production of original or translated modern Irish literature, along with publishing cheap elementary works for learning purposes and distributing them at reduced prices to classes and associations connected with the Society. Its creation was soon followed by that of the Gaelic League in 1893, which sought to promote Irish through the publication and distribution of books and pamphlets in Irish, a *Gaelic Journal* dedicated to related subjects, and free grants for books (MacMathúna 51).

From these examples it is clear that the beginning of the Irish language revival was inextricably tied with the revival of Irish literature. Here it is important to note that, in contrast to Quechua, Irish has a strong written tradition dating back to the sixth century and the rich manuscripts that were produced during that time period (MacMathúna 50). Still, these movements managed to inspire new works of literature as early as 1894, with An tAthair Peadar Ua Laoghaire's book *Séadna*, which was written with young Irish language learners in mind. As MacMathúna notes, "the very fact that Irish was being written, could be written, was vested with symbolic significance, and soon became a powerful weapon in the language movement's crusade to gaelicize the administrative environment of urban areas" (55).

This momentum was translated into important gains, such as obtaining bilingual street signs and a highly visible, unapologetic public movement for the acceptance of

Irish in more public spaces, such as addresses on packages and names on the side of carts (MacMathúna 59). In the case of street names, one contributing factor according to MacMathúna, was that bilingualization was naturally assumed in the process in such a way as to not threaten the existing English names (56). By 1915, around three hundred books and publications had been issued in and about Irish. Unfortunately, despite initial success, Irish publishing enterprises began to run up against a lack of funds. The problem was that, despite the large accomplishments in creating a fledgling modern Irish literature, there was not a large enough book-reading public to sustain the market (MacMathúna 59, 61).

With independence in 1922, Ireland imposed much more proactive measures to revive Irish Gaelic. Irish was made compulsory in school, knowledge of the language was required to enter the civil service, and legislation was required to be issued in both English and Irish. It is suggested, however, that the zealous imposition of the language actually was counterproductive, as the highly nationalist-oriented education programs provoked a backlash among school children alienated by the often blunt attempts at indoctrination. Successive government policies have often been implemented half-heartedly, and attempts at greater use of Irish Gaelic in the media have met limited success (Ferreira n. pag.). The future of the Irish language looks bleak, with only just under 1.66 million speakers in 2006, according to the Central Statistics Office Ireland, and it is not stated how many speak it fluently.

Quebec

At first glance, the context of the Francophone movement in Quebec would seem so dissimilar from that of Quechua as to not warrant comparison. Canada, after all, is a

developed country with a stable democracy and French is not a persecuted indigenous language, nor does it lack speakers and language materials worldwide. Still, it is one of the few movements examined here that can be considered a success (Laporte 75) and some important lessons can be gained from the experience of language planning in Quebec. Worth noting is that despite differences stated above, there are some unexpected similarities between French in Canada and Quechua in Peru.

One important parallel is that, like Spanish in Peru, English has historically been the language of socioeconomic dominance in Quebec, while the lower economic echelons have spoken French. There have been two main manifestations of this. The first was the use of English for communication in the public domain, such as advertising, product labeling, official corporation names, etc. The second was the status of English as the language of economic advancement. Higher strata in the corporate world clearly corresponded to greater use of English and lesser use of French (Laporte 56-7). In such a way, historical English use in Quebec has very much resembled current Spanish use in the Peruvian Andes. Bourhis points out that although "French has maintained its prestige as a major language of culture and technology internationally, it remains that in Anglo Canada, French was historically relegated to a low status position not unlike that of ancestral languages in Europe" (9).

What is interesting about the French movement in Quebec is that its main goals were based on status planning for the French language and were carried out primarily through a top-down process of strong state intervention. Although other measures were passed before it, the promulgation of the Charter for the French Language in August 1977, also known as Bill 101 (Bourhis 18-19), is the major milestone in terms of this

strategy. The bill, which was criticized as "rigid, dogmatic, jealous and authoritarian" (Bourhis 43), included heavy-handed measures to implement the use of French across all sectors of Quebec society and elevate the status of the French language.

Bill 101 mandated the use of French in courts, public administration and businesses. While previous laws had established incentives for the use of French in business and industry, Bill 101 explicitly stated deadlines and sanctions regarding the increased use of French. Education was to be administered in French, although the law provided for some parents to opt for English education (Bourhis 40-1). One of the noteworthy aims of the law was to target the "linguistic ambiance" of Quebec, specifically, advertising, the labeling of products, and official names of corporations (Laporte 57).

Ultimately, the law drew extreme criticism from different sources, especially Quebec's Anglophone community, but it was understandably supported by most of the French speakers in the province (d'Anglejan 43). At the outset, the greatest resistance came from the business community and those fearing economic losses due to the law's requirements for industry and businesses. However, after analyzing the data, Laporte concludes that the feared costs were not nearly as high as envisaged by critics, and much criticism was based more on "moral condemnation" from a free-market point of view than on empirical evidence (68). The adverse effects of Quebec's authoritarian language policy are still subject to debate, and changes have since been made to be more accommodating to non-Francophone minorities (d'Anglejan 45-7), but French has without a doubt seen remarkable gains in status and public use since the imposition of Bill 101 (Laporte 75).

Basque Country

The Basque language existing mainly in northern Spain, called Euskara ("Basque Language" n. pag.), is another diminishing language that has seen plenty of successes and failures in its own language movement. Rather than discuss the history of the entire Euskara language movement, however, a brief explanation of the unified Basque language that was created is most pertinent and will suffice for the purposes of this paper. The Basque language is divided into six different dialects (Gerli and Armistead 151), a fact which, as with Quechua, produces issues for education and language planning programs. Euskaltzaindia, the official Basque Academy of the Language, which was founded in 1918, created in 1968 a Standard Euskara ("Process to Unify" n. pag.) for use in mass media, modern literature, and teaching ("Euskara" n. pag.).

The Standard Euskara, called Euskara Batua, was based mainly on the Gipuzkoa, Nafarroa and Lapurdi dialects, with especially heavy weight given to Gipuzkoa. This caused fervent debate in the Basque community, with opinion generally tilted against the artificial Euskara Batua. Despite criticism, however, the standard version eventually gained acceptance in education and other areas and is now predominantly used in the media and administrative contexts as well, although the various dialects are still spoken at a local level ("Process to Unify" n. pag.). This paper will argue that similar planning would be beneficial to the cause of comprehensive Quechua education in Peru.

India

Lastly, the current national language policy of India will be briefly discussed for its unique approach to multilingual education. India is an immense country with 387

living languages, a colonial past, and a complicated linguistic legacy. After gaining

independence from Britain in 1948, India adopted a constitution officially recognizing

twelve different languages within its borders (Spolsky 173). India later implemented a

Soviet-style language policy, making Hindi the overarching official language of India,

with English still retained for certain purposes, but this policy led to resistance in non-

Hindi states. Regional opposition was mounted, leading to political conflict and

occasionally violence (Schiffman n. pag.).

     More recently, India has reappraised the situation and accepted a compromise

called the three-language formula, developed in the 1960's. Under this policy, three

languages are taught in each region: Hindi, English, and the local language. In

predominantly Hindi-speaking areas, other Indian or European languages can be taught as

the third language (Schiffman n. pag.). In this way, a country as ethnically and

linguistically varied as India was able to reject an assimilationist policy and

accommodate a greater number of cultures, languages, and regional preferences without

also giving way to an ungovernable excess of variation.

Formulating an Ideal Theory

Following the exposition of modern theories on education and language planning and the outside cases of language movements and multilingual education policies, the next step in this study is to synthesize an ideal theory on how to implement comprehensive Quechua education in Peru. This theory is developed assuming policy options uninhibited by the various impediments discussed under the "Obstacles" section of this paper. The next section will explain the Theory-Context Mergence Approach and use it to adapt the ideal theory to the obstacles present in the practical context of Peru.

Corpus Planning

The theoretical ideal corpus planning for Quechua education in Peru includes using the six different standardized varieties of Quechua already developed in the 1970's and 80's. This provides a balance between standardization and comfort for the vernacular varieties of Quechua spoken throughout the country. It ensures that there are standards from which curriculum can be developed while allowing local flexibility in using one of the standard varieties most similar to the local vernacular. The dictionary sets for each of these varieties should be updated and undergo a thorough revamping by linguists and native speakers to reflect modern word usage in the vernacular. As per the theories on purism stated earlier, Spanish loanwords should not be purged from the six standard varieties so as to maintain the currency and utility of the Quechua being instructed.

Status Planning

Following the success of status planning for French in Quebec and theory on domain use, the Peruvian government should implement extensive policies to increase the

use of Quechua in the public domain. In regions that predominantly speak Quechua, advertising, the labeling of products, and official names of agencies, corporations and organizations should be provided in Quechua so as to create a new "linguistic ambiance" (Laporte 57) that will establish a privileged status for the language. Media and publications in Quechua-speaking areas should be provided in Quechua. Strong measures should be implemented to protect the use of Quechua in courts, schools and administrative spaces. Similar to the Indian three-language formula (see "India" under "Outside Cases"), Spanish should be taught in all regions along with the predominant native language, and in predominantly Spanish-speaking areas, either an indigenous or foreign language could be taken along with Spanish.

Acquisition Planning

Quechua taught in schools should be based on student-driven curriculum. The government should train bilingual teachers to create two-way immersion programs that encourage student input to tailor lessons based on what the students are interested in. It should focus on creating practical proficiency with students able to exchange ideas and create meaning. Classrooms in predominantly Quechua-speaking areas should have a mix of Spanish-speaking and Quechua-speaking students to foster bilingualism. Vernacular should be allowed in the classroom while teaching the standard forms, as discussed earlier. Education should be focused on developing strong L1 literacy before attempting to teach the L2.

Applying the Theory-Context Mergence Approach

The next step is to apply the Theory-Context Mergence Approach developed by this study. The process starts by taking the ideal theory, explained in the last section, and adapting it to merge with the context, in this case, Peru. The context consists of the three main obstacle areas identified earlier: culture, politics, and resources. These make up the points of the Theory-Context Application Triangle (Appendix, Figure 1). By merging the theory with each point of the triangle, the paper will identify how to adapt the theory to make it more practical.

Merging with Culture

In adapting the theory to better fit the culture of Peru, the status planning needs to be scaled back to avoid a popular backlash. Emphasis instead needs to focus on bottom-up strategies to raise the language's status. These include support for the promulgation of literature and media in Quechua, much like in the early Irish Gaelic movement. In encouraging a body of literature to be created in Quechua, it is possible to prime a grassroots movement that no longer sees the language as antiquated, but rather as a modern, living entity.

The lesson from Ireland, however, is that these movements lose steam if there are not enough educated speakers to support the creation of new literature and media. Therefore, either government support is needed for literacy programs, or it is necessary to encourage communities to create and implement their own education programs, as was done in Bolivia (see "Bolivia" under "Outside Cases"). If successful, the programs of

these empowered communities can often "bubble up" to the government level and they can turn into part of the official policy.

Merging with Politics

In adapting the theory to merge with politics, it is necessary to acknowledge the resistance to changing the status quo of indigenous language policy, and the half-hearted commitment to programs the government espouses. With this in mind, the ideal theory must be scaled back and expanded at the same time. It must be scaled back in regards to status planning, first in that increased "linguistic ambiance" and public space for Quechua will have to come incrementally. Calling for better enforcement of laws already on the books is a practical start. This is part of what congresswomen Supa is already doing by exercising her right to speak Quechua before the legislature ("Google it in Quechua" n. pag.). By starting with ensuring Quechua's protection in courts and before government authorities, forcing the government to hire translators, Quechua will move into greater use in public domains. After building more public acceptance, it will be possible to lobby the government for an even greater presence.

Merging with Resources

In acknowledging the enormous resource and logistical restraints in rural education implementation, the ideal theory needs to be adapted in a series of ways. First of all, it would be extremely difficult to update and implement the six different varieties of standard Quechua that currently exist. Therefore this paper proposes a concerted push to create one standard variety of Quechua for use in education in Peru. This follows on

the example of Euskara Batua (see "Basque Country" under "Outside Cases") and "Quichua Unificado" in Ecuador (McCarty 146).

Like the First Workshop on Quechua and Aymara Writing that developed a new vowel system for Quechua in 1983 (Hornberger, "Five Vowels or Three? 187), a committee should be created to establish one standard Quechua in Peru. It could be based mainly on the Cuzco dialect, which is the most widely spoken (Gordon n. pag.), but it should be neutral enough and artificial enough to not illicit too much protest against dialectal favoritism (as in the case of Euskara Batua). There will be adverse effects of this in the short term while the population adjusts, and it will probably not be very popular at first. Still the benefits of standardization ("Quechua Language Revitalization" 311-2) appear to outweigh these concerns.

In terms of acquisition planning, special emphasis will have to be given to curricula and program planning on the local level, as stated earlier. Furthermore, it is not feasible to have two-way bilingual immersion since many of the target communities are so remote and simply do not have Spanish-speaking students to create a mixed classroom. Therefore it is better to follow a policy of indigenous immersion programs that incrementally introduce Spanish into a bilingual setting once students achieve solid literacy in Quechua. This is still keeping in line with Auerbach's findings on second language acquisition.

Presentation

Since this paper proposes a holistic approach to bringing about effective Quechua education reform, the question of presentation of proposals is necessary to mention. The ideal theory calls for radical changes and strong top-down government policies. These

run against the traditional culture and politics of Peru, which views Quechua as antithetical to modernity and progress, and does not welcome its use in the public domain (see "Cultural Status" under "Obstacles"). Therefore, even after being scaled down through application of the Theory-Context Mergence Approach, the proposals should be presented in practical terms that challenge the public and politicians to rethink national policies without directly confronting cultural prejudices.

These consist of the arguments presented in the "Importance of Quechua Education" and "Concerning National Unity" sections of this paper. Namely, they are the arguments that Quechua education will provide opportunities for development, will aid advances toward universal Spanish literacy (and literacy in general), will help integrate marginalized sectors of society, may reduce the flow of poor migrants to the coast, and will preserve Peru's cultural heritage. It should be emphasized that Spanish will still be taught in all parts of the country, and that Quechua will not be imposed on anyone who does not wish to learn it.

Conclusion

This paper proposes a holistic approach to making Quechua education successful in Peru. The process developed to reach its conclusions involves taking modern theories of education and language planning as well as examples from outside case studies of language movements and policy to create an ideal theory for Quechua education policies in Peru. Then this theory is adapted to merge with the culture, politics, and resource restraints of Peru.

The major strategies proposed in this paper are the following: to encourage the production of literature and media in Quechua to help precipitate grass roots movements, to focus on increasing Quechua literacy, which will also help support the creation of new literature and media, to encourage community-run education initiatives that use student-driven curricula and allow vernacular use in the classroom, to utilize incremental bilingual programs to transition into Spanish instruction, but only after Quechua literacy is achieved, to push for greater government protection of public space for Quechua, to create a single standardized form of Quechua for all of Peru that eschews language purism, and to present the above strategies in a practical, non-confrontational manner to the non-Quechua citizens and politicians of Peru.

The concluding strategies listed here can also be summarized well and visually organized through The W.K. Kellogg Foundation Logic Model Development Program Planning Template (Appendix, Model 1). It identifies the main problems to be solved through this paper's approach, the community needs and assets to be taken into account, the desired results of the approach, the influential factors affecting the situation, the

chosen strategy for accomplishing the results, and lastly, the assumptions upon which the study is basing its framework.

The fundamental conclusion of this study is that effective Quechua education will only come about through sustained support of both top-down and bottom-up strategies. Almost exclusive use of top-down policies can be successful, as in the case of Quebec, but only if enough of the population wants to take advantage of the policies. In the case of Ireland, bottom-up and top-down strategies never made the necessary connection to be successful. Efforts at creating a modern literature and reviving the use of Irish Gaelic (bottom-up) came too far in advance of the government's push for Irish literacy (top-down) and therefore fizzled out. Later, the government's efforts were largely unsuccessful because the public was still not motivated enough to obtain and propagate Irish Gaelic.

The apparent paradox of this situation is that politics cannot be changed without motivated and empowered communities, but the communities will not feel motivated and empowered until there is more government support for their aspirations. The more positive way to envision this interplay is through the depiction of the Language Revitalization Cycle (Appendix, Figure 2), created from the findings of this study. The cycle has four parts: policy reform, increased status, public support, and lobbying. These all refer to status planning for language policy. Lobbying could refer to general pressure as well as formal lobbying. Affecting positive change on any part of the cycle can cause a chain reaction of positive feedback moving along the arrows. Therefore the strategies espoused in this paper attempt to target each part of the cycle for maximum impact. Once

strong enough movement has been created in the cycle, it is self-sustaining, and effective education policies will come on their own.

Creating societal change is easier said than done, however, and there is still a long way to go. The feat of developing effective Quechua education in Peru would be good news in a country that has been plagued political and economic turmoil in years past. It would lift up traditionally marginalized sectors of society and help integrate millions of people politically and socially with the more developed parts of the country. It would also go a long way toward healing societal wounds left from centuries of colonization. Hopefully this study can help provide the best strategies for the first steps in that direction.

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    Science+Business Media LLC, 2008.

Appendix

Figure 1:

The Theory-Context Application Triangle

Culture

How to present   How to implement

Theory

Politics   **Resources**

What is feasible
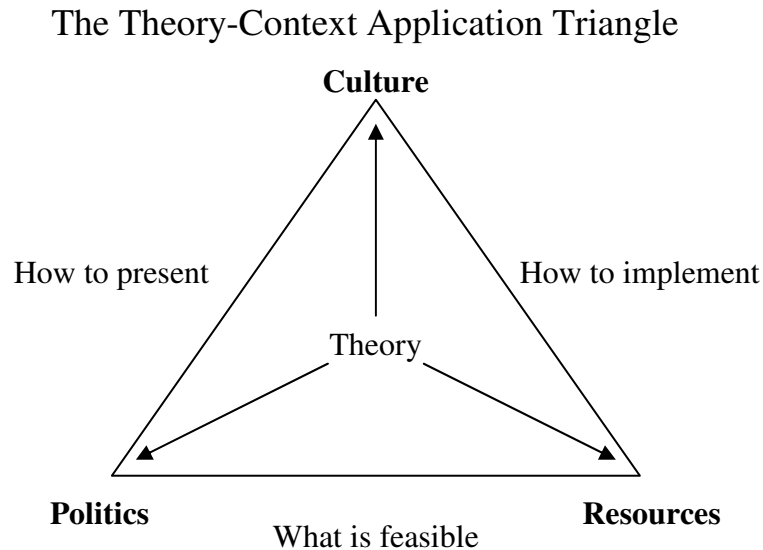
Model 1:

The W.K. Kellogg Foundation Logic Model Development Program Planning Template
Theory-Context Mergence Approach Quechua Education Program

Strategies ⑤

- Create public campaigns to improve language status and empower Quechua communities.
- Lobby government for education reforms.
- Foster creation of greater number of Quechua publications and media.

Assumptions ⑥

- Quechua is not a sign of "backwardness."
- Change is most successful when implemented by both top-down and bottom-up approaches.
- The status of stigmatized languages needs to change before programs can be effective.

Influential Factors ④

- Number of Quechua speakers decreasing periodically.
- Many are ashamed to speak Quechua or see it as useless.
- Government lacks political and economic capital to carry out many reforms.

Problem or Issue ①

- Number of Quechua speakers is steadily decreasing.
- Lack of effective education programs.
- Prejudiced views and attitudes inhibit progress.

Community Needs/Assets ②

- Need schools and trained teachers.
- Rely on government or international organizations for education funding.
- Communities need to be empowered to direct their own education initiatives.
- Need to be shown that Quechua is a resource and not "un-modern."

Desired Results (outputs, outcomes, and impact) ③

- Trend reversed of decrease in Quechua speakers.
- Heightened respect for Quechua language.
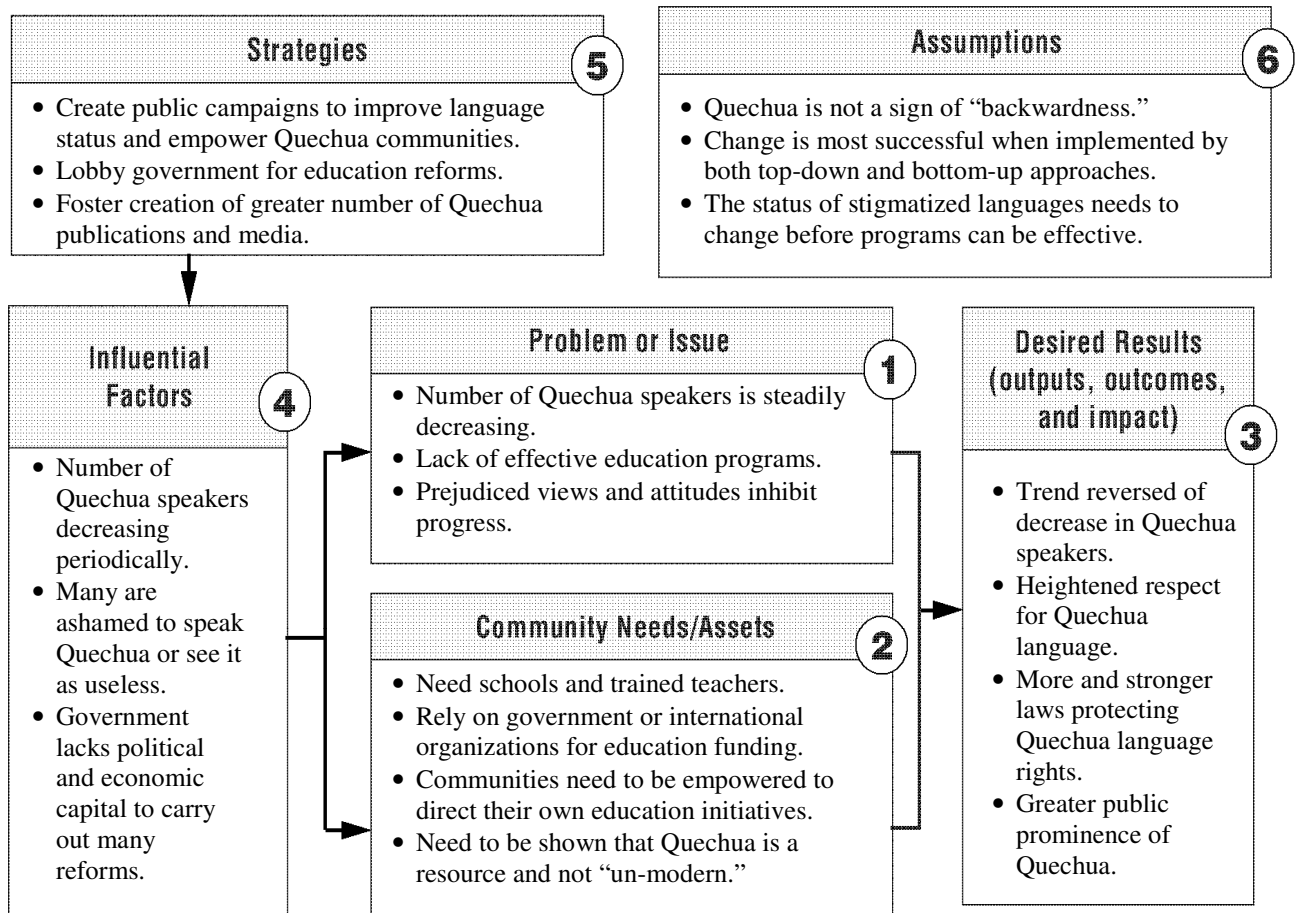- More and stronger laws protecting Quechua language rights.
- Greater public prominence of Quechua.

Figure 2:

The Language Revitalization Cycle

Policy Reform

Lobbying

Increased Status

Public Support