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**Models of Trilingual Education in  
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**A Matrix Approach to Language Policy  
Analysis**

**Vincent Kan & Bob Adamson**

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## **Models of Trilingual Education in Ethnic Minority Regions of China Project**

This research project offers a holistic and descriptive account of trilingualism and trilingual education in China. Policy changes have led to the introduction of English language teaching and learning in primary schools. These reforms pose particular challenges to communities in ethnic minority areas, where Putonghua often competes with the minority language, and English is often taught in under-resourced schools with teachers with the requisite training in short supply.

The project involves extensive and intensive research comprising investigations into school- and community-level practices, policies and perceptions relating to trilingualism in such key regions as Xinjiang, Yunnan, Inner Mongolia, Sichuan, Gansu, Guizhou, Guangxi, Qinghai, Jilin, Tibet and Guangdong. Using first-hand data collected from each region, the researchers examine language policies and curricula, as well as language allocation in the classroom and in the community, and analyse them in their specific historical, socio-political, demographical, economic, geographical and cultural contexts.

A distinctive feature of the project is its presentation of a new methodology and approach to researching such phenomena. This methodology encompasses policy analysis, community language profiles, as well as school-based field work in order to provide rich data that facilitates multilevel analysis of policy-in-context.

*Models of Trilingual Education in Ethnic Minority Regions of China Project* Technical Papers Series Editors: Anwei Feng (University of Nottingham, Ningbo, China) and Bob Adamson (The Education University of Hong Kong)

This series of Technical Papers presents information about the research instruments used in this project.

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# A Matrix Approach to Language Policy Analysis

## Introduction

Matrix analysis is an approach sometimes used in policy studies for side-by-side presentation of large amounts of quantitative data (Monke & Pearson, 1989). While qualitative data do not lend themselves to such comparison, the arbitrary nature of the data does not exclude the possibility of using a matrix. The matrix set out in this Technical Paper allows for a qualitative approach to predict the outcomes of language policy. We believe that the matrix can be used not only to analyse a language policy but also to inform policymaking in interests of creating policies that are both educationally sound and politically relevant. The matrix involves evaluation of the potential strengths and weaknesses of a language policy in a specific context. It sorts political goals from educational goals, and highlights areas in tension. We have used it to evaluate and predict language policies in Hong Kong since 1997 (Kan & Adamson, 2016).

We have named the matrix the “Ferguson Tollefson Matrix” (FTM) after Gibson Ferguson and James Tollefson, because we extracted the 11 (five from Ferguson and six from Tollefson) conceptual questions and issues that provided the framework for the FTM from Ferguson (2006) and Tollefson (2002). However, in a departure from Ferguson and Tollefson’s original intention that the questions or issues were to stimulate in-depth analysis, the FTM uses them as a categorisation filter — meaning that each question or issue is used to determine whether it had a primary orientation that was either educational (E) or political (P).

## Ferguson and Tollefson on Language Policy

In their separate work, Ferguson and Tollefson view language policy is a product of planning, albeit by adopting different perspectives. Ferguson associates planning with historical recognition and expertise, and argues that problems arise when either is misplaced. Tollefson, on the other hand, is more interested in the motives of stakeholders, and the capacity for power to corrupt the policy process, resulting in flawed language policies. Nonetheless, the questions and issues raised by Ferguson and Tollefson, taken together, cover a broad range of educational and political aspects of language policy, and their approaches can mesh in the FTM.

The 11 categorisations for the FTM as set out below (Table 1) were created through a process of Expert Validation (see Kan, 2011 for details, including the rationale for each categorisation). (Note that, as the matrix cannot accommodate sub-questions, Ferguson’s original question 3 has been separated.)

Table 1: *Categorisations in the FTM (Kan, 2011; Kan & Adamson, 2016)*

Source	Issue/ Question	Identifier	Orientation
Ferguson (2006: 34-35)	<b>Medium of Instruction (MoI):</b> What is the choice of MoI for various levels of the education system?	F1	E
	<b>Home language:</b> What is the role of the home language (or mother tongue) in the educational process?	F2	P
	<b>L2/FL:</b> What is the choice of second / foreign language as curriculum subjects of instruction? Also: a) When will these languages be introduced into the curriculum?	F5	E
	b) Will the foreign language study be made compulsory? If so, for whom and for how long?	F3	E
	c) What proportions of the school population will be exposed to second / foreign language instruction?*		
	d) How (and for how long) will foreign language study be linked with/enable academic subject study in a foreign language?		
	<b>Variety:</b> In the case of English and a few pluri-centric languages, what variety of the language will serve as a model (or norm) for teaching purposes?	F4	E
Tollefson (2002: 13-14)	<b>Policy forces:</b> What are the major forces affecting language policies in education, and how do these forces constrain policies and the public discussion of policy alternatives?	T1	P
	<b>Access:</b> How do state authorities use educational language policies to manage access to language rights and language education?	T2	P
	<b>Governance:</b> How do state authorities use language policy for the purposes of political and cultural governance?	T3	P
	<b>Conflicts:</b> How do language policies in education help to create, sustain, or reduce political conflict among different ethno-linguistic groups?	T4	E
	<b>Global processes:</b> How are local policies and programmes in language education affected by global processes such as colonisation, decolonisation, the spread of English, and the growth of the integrated capitalist economy?	T5	E
	<b>Indigenisation:</b> How can indigenous peoples and other language minorities develop educational policies and programmes that serve their social and linguistic needs, in the face of significant pressures exerted by more powerful social and ethno-linguistic groups?	T6	E

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## The Matrix

The matrix (Table 2) is designed to analyse language policies by separating out issues that have a strong educational orientation from those which have a strong political orientation, while also identifying issues that are a mixture of the two orientations.

In terms of construction of the FTM, Ferguson's questions (F1 to F5), which focus on curriculum and pedagogy, form the rows of the matrix, and Tollefson's questions (T1 to T6), about the socio-political context, form the columns. Next, each of F1 to F5 and T1 to T6 has been assigned a primarily educational or political attribute. (Note that the order of questions in the first column has been changed so that areas with the same shading can be grouped into the same zones to make the matrix easier to read.)

When evaluating a language policy, the researcher should answer each pair of questions in the matrix with reference to the relevant policy documents. For example, imagine that a policy addresses the medium of instruction (MoI) issue in terms of access, global process, and indigenisation. The research would mark a cross (X) in the corresponding matrix cells, which, in this case, would be cells F1-T2; F1-T5 and F1-T6. The cells are in different shaded areas on the FTM, as F1-T2 is classified as having a mixed educational and political orientation, while F1-T5 and F1-T6 fall under educationally oriented statements. Once the analysis is complete, the researcher can see which orientation predominates according to the distribution of the crosses.

Underpinning the FTM is our belief that:

1. An evaluation that produces a **primarily educational orientation** suggests that the policy has potential to have an impact in terms of producing meaningful teaching and/or learning effects.
2. An evaluation that produces a **primarily political orientation** suggests that the policy is potentially controversial and, once implemented, they could produce unwanted reactions from stakeholders or may not have the educational traction to bring out effective change in the classroom.
3. An evaluation that produces a **mixed educational and political orientation** suggests that the language policy will be potentially ineffective, meaning that, upon implementation, they might achieve neither the political nor the educational objective of the policy statement.

The FTM provides the researcher with an indicative prediction, which can complement deeper analysis of the policy context and/or the policy's position on matters such as subject knowledge or where necessary.

Table 2: The FTM

	Socio-political context					
	T1	T2	T3	T4	T5	T6
	Policy forces	Access	Governance	Conflicts	Global processes	Indigenisation
<b>F1</b>						
<b>MoI</b>						
<b>F4</b>						
<b>Variety</b>						
<b>F5</b>						
<b>L2/FL(a)</b>						
<b>F2</b>						
<b>Home language</b>						
<b>F3</b>						
<b>L2/FL(b-d)</b>						

Key:



policy statements in this zone are educationally oriented



policy statements in this zone are politically oriented



policy statements in this zone have mixed orientations

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