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CHAPTER 27

SOCIAL IDENTITY AND LANGUAGE LEARNING

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For almost 50 years, identity has been a focal point for scholars interested in the social factors that influence second language (L2) learning.¹ Unlike other educational domains, the process of learning another language often has been argued to be influenced not only by the dynamics within the classroom, but also by the sociopolitical relations between ethnolinguistic groups in the broader societal context. Various frameworks have been proposed to better understand the interconnections between identification with these groups, termed social identity, and language learning. The purpose of this chapter is to outline some of these approaches and to discuss current controversies in the area. What we hope to demonstrate is that, regardless of ontological, epistemological, and methodological orientation, there is general agreement that developing competence in and using a nonnative language are intricately linked to the self and identity processes, power dynamics, and motivated effort and engagement in the learning process.

We do not claim to be exhaustive in our review; indeed this topic has garnered a great deal of academic attention, particularly in recent years. Rather, we concentrate on some representative research programs to underscore the diversity of scholarship in the area, and we do so in some detail in order to illustrate points of convergence and departure between them. We have organized this chapter with a historical structure, first outlining the early models that were developed primarily by social psychologists and then considering various critiques of these frameworks, followed by a review of more recent "sociocultural" frameworks. Through our exposition, we hope to capture the range of perspectives that inform the subject area and also to emphasize the benefit of multiple insights into the theme of language learning and social identity.

¹For the purposes of the present article, "learning" and "acquisition" are used synonymously.

I. INTERGROUP/SOCIAL PSYCHOLOGICAL PERSPECTIVES²

The possibility that positive attitudes toward and social relations between members of different language groups might influence language-learning outcomes received some sporadic attention in the early part of the 20th century (see Gardner, 2001, for overview of early studies). For example, Whyte and Holmberg (1956, p. 13) claimed that American businesspersons' capacity to establish "sympathetic interest" and to identify with Latin American partners was the key to language learning, and hence commercial success. Nida (1956) suggested that two motivational forces, a desire to communicate and sensitivity toward the outgroup, were important considerations in language-learning achievement. Systematic research programs, however, began to develop only in the 1960s, and in this section we will focus on theoretical frameworks that were proposed between then and the 1990s, many of which have sustained productive research programs up to the present.

A. Identity and Additive and Subtractive Bilingualism

Perhaps the earliest programmatic investigation of the link between social identity and language learning was that of Lambert, whose extensive work on bilingualism laid the foundation for much of the social and cognitive psychological research that was to follow (see Dil, 1972). Lambert (1956) maintained that learning an L2 entailed not only the acquisition of a linguistic system but also the acquisition of cultural characteristics of the target language group. In his comparison of beginning and advanced learners of French and bilingual Francophones, Lambert identified two clusters of language variables that were differentially involved in the process of becoming bilingual. The first was a "vocabulary" cluster, relating to specific vocabulary differences between languages, and the second a "cultural" cluster, pertaining to differences in linguistic behavior that were culturally based. Lambert maintained that the latter cluster represented a set of barriers to bilingualism that are difficult to overcome, and he argued that to do so it is necessary to adopt certain characteristics of the cultural group, thereby making the language a part of the self (Gardner, 2006). Although such changes in identity may sometimes be associated with anomie (Lambert, Gardner, Barik, & Tunstall, 1963), it was only when language, thought, and the self-concept became intertwined that communication in the nonnative language would become automatic (Gardner, 2006).

Contrary to the opinion held by many at that time, Lambert (1978) was emphatic that there was "no basis in reality for the belief that becoming bilingual or bicultural necessarily means a loss or dissolution of identity" (p. 544). His research, which covered a variety of contexts in North America, revealed several identity profiles that

²We are reluctant to use the term "social psychological" in contrast with "sociocultural," although Dörnyei (2005) has used this term to describe the work of Gardner and related theorists. Our reluctance comes from the fact that many social psychologists work within sociocultural frameworks. We feel it is more important to emphasize that the intergroup models tend to focus on social identities relevant to sociopolitical groups (often, but not always, from a sociocognitive perspective), whereas sociocultural models tend to focus on social identities as they constructed through interpersonal dynamics.

described the experience of bilingual people. Lambert noted that Franco-American youths who were successful at being both French and American shared the conviction that knowing both languages was useful and valuable in their social world. This pattern, in which one acquired two languages and lived with two cultural reference groups in relative ease, he termed "additive biculturalism" or "additive bilingualism." Other youths felt some pressure to give up one aspect of their dual identity:

... some oriented themselves definitely toward their French background and tried to ignore their American roots; others were tugged more toward the American pole at the expense of their Frenchness; and still others apparently tried not to think in ethnic terms, as though they did not consider themselves as being either French or American. (p. 540)

This pattern Lambert termed "subtractive biculturalism" or "subtractive bilingualism." Over time, subtractive bilingualism came to refer particularly to cases in which acquisition of an L2 threatened the loss of the first language (L1) and culture (cf. Gardner, 1985; Swain & Lapkin, 1991).

Lambert posited that the value accorded by a society to an ethnic group and its language was fundamental to the development of an additive experience of bilinguality and biculturality. He suggested that in communities where differential prestige exists between ethnolinguistic groups, both groups should focus on the development of skills in the nondominant language. In this way, subtractive experiences of bilingualism and biculturalism could be transformed into additive ones for all members of society. Lambert's theoretical ideas have been foundational for many scholars interested in bilingualism and language learning (see Reynolds, 1991, for an overview), including many of those we will discuss in greater detail below.

B. Integrativeness and the Socioeducational Model

Extending his work as a student under Lambert's supervision, Gardner developed what was to become the most influential research paradigm in the social psychology of L2 learning (Gardner, 1985, 2006; Gardner & Lambert, 1972). The socioeducational model of language learning focuses on formal, classroom contexts, and much of its empirical research has centered on English-speaking Canadians learning French. The central variable, motivation, is comprised of a broad range of features linked to attitudinal, goal-directed, and effortful behavior (Gardner, 2001). Within the Attitudes and Motivation Test Battery, it is more concisely operationalized through self-report instruments roughly corresponding to behavior, cognitions, and affect: (a) motivational intensity, or the level of effort expended; (b) the desire to succeed in learning the language; and (c) positive attitudes toward learning the language.

Motivation is supported by positive attitudes toward the learning situation and integrativeness; it is integrativeness that is most germane to issues of social identity. Integrativeness encompasses the notion of identity in the sense that one has "a willingness to be like valued members of the language community" (Gardner & Lambert, 1972, p. 271), sometimes to the point of identifying with that language group (Masgoret & Gardner, 2003). In recent discussions, Gardner (2006) emphasizes that

integrativeness refers more broadly to an openness to have contact with the L2 community and with other cultural communities.

Like motivation, integrativeness is a complex of constructs, and it is generally assessed in terms of general interest in foreign languages, positive attitudes toward the L2 community, and an integrative orientation (Gardner, 2005). The term "integrative orientation" refers to the goal of learning an L2 because one wishes to have contact with, and perhaps identify with, the target language community. Gardner and his colleagues emphatically point out that orientations are not particularly good predictors of eventual achievement—without active engagement and intense effort, an orientation remains a vague, disembodied notion. When integrativeness, positive attitudes toward the learning situation, and motivation are all evident, the complex is described as an "integrative motive." Gardner (2006) maintains that, across societal contexts, such a motive is necessary to achieve the degree of automaticity that is characteristic of native-like speech.

Considerable research over 40 years attests to the central role that motivation, and particularly the integrative motive, plays in predicting language-learning achievement. A recent meta-analysis of 75 investigations succinctly describes the major findings (Masgoret & Gardner, 2003). Notably, of all the social psychological variables described in the socioeducational model, motivational intensity is the key predictor of achievement. In response to suggestions that social identity and sociopolitical concerns might be more relevant in the L2 context than the foreign language context, Masgoret and Gardner also tested whether the association between variables indicating integrativeness and proficiency might be stronger in second versus foreign language context, defined in terms of how well the L2 group is represented demographically, and implicitly, how potentially available its members are for social interaction with the learner. Their results showed no strong evidence that context mattered: integrativeness variables predicted grades better in the L2 context, but predicted other proficiency measures better in the foreign language context. Elsewhere, Gardner (2005) demonstrated that the attitudinal and motivational variables predict proficiency (grades) in other national contexts, including Spain, Poland, Croatia, and Romania, as they do in Canada, thereby underscoring the potential validity of this model across national contexts.

C. Contact, Confidence, and the Sociocontextual Model

Clément's (1980) sociocontextual model retains the notion of integrativeness from the socioeducational model, but gives more attention to the importance of the learning context and, in recent years, more explicitly articulates how identity processes might be involved in language learning. This framework proposes that dynamics in the broader societal context, particularly the relative sociostructural status, or ethnolinguistic vitality (see Giles, Taylor, & Bourhis, 1977), of ethnolinguistic groups initiates a dialectical motivational process involving a set of opposing attitudes. Integrativeness, or the "desire to become an accepted member of the other culture" (Clément, 1980, p. 149), corresponds closely with Gardner's notion. "Fear of assimilation" refers to the apprehension that learning an L2 will result in the loss of the first culture and language.

In relatively homogeneous cultural contexts with little opportunity for interethnic contact, the outcome of this attitudinal dialectic is expected to predict motivation to learn the language. In turn, motivation and the ensuing communicative competence in the L2 have implications for acculturative change within the cultural group. In line with Lambert's notions of subtractive and additive bilingualism, two patterns of identification are postulated. For members of a majority group, the strong vitality of their ethnolinguistic group is argued to ensure the continued viability of the language and cultural identity. Thus, these individuals might be expected to experience integration, whereby identities with both cultural groups would be incorporated into the self-concept (similar to "additive bilingualism"). For members of minority groups, their group's weaker vitality is less likely to support the L1 and culture, and these individuals might experience assimilation, whereby the acquisition of an L2 and its culture is accompanied with the loss of the original language and cultural identity (akin to "subtractive bilingualism"). These outcomes at the group level, in turn, play back into the identity attitudes of individual learners.

In multicultural contexts where there is the potential for regular interaction with members of the L2 community, a second motivational process is posited to complement the attitudinal one. With increasingly frequent and better quality intergroup contact, individuals develop a sense that they are competent in the L2, accompanied by low levels of anxiety. This linguistic confidence supports the learner's motivation to engage further in language learning, with the attendant possibilities of integration or assimilation. Several studies support this hypothesized pattern: Although linguistic confidence is generally associated with stronger identification with the L2 community across high and low vitality groups, its relation with the L1 identity differs depending on the group vitality. Confidence using the L2 is unrelated to identification with the L1 group in the case of higher vitality groups, such as most English learners of French in Canada, and linked to lower levels of L1 identity in lower vitality groups, such as minority Francophones and immigrants in Canada (e.g., Gaudet & Clément, 2005; Noels, Pon, & Clément, 1996).

In the sociocontextual model, then, attitudes regarding social identity are foundational to motivation and identity changes are linked to motivated engagement and confidence and competence in the L2. In elaborating on identity, Clément and Noels (1992) proposed a situated approach that takes into account aspects of the immediate social interaction. They argue that, because identities are negotiated between interactants, identities shift depending on with whom one interacts, the setting in which the interaction takes place, the activity or topic under consideration, along with a host of other considerations. Moreover, consistent with the notion that people often negotiate multiple identities, in any given situation a learner may potentially identify more strongly with one group than the other group, with both groups to the same degree, or with neither group if ethnicity and language are not relevant to the interaction. Investigations by Clément and his colleagues consistently point to a trend in which identity shifts across situations, corresponding with the language and ethnicity of the people one is with (see Clément, Noels, & MacIntyre, 2007, for a review); such findings parallel those reported in experimental or diary studies (e.g., Ross, Xun, & Wilson, 2002; Yip, 2005). Moreover, these situational patterns are moderated by one's self-confidence in their English skills, such that those who are

confident in the L2 show greater situational variation than those who lack confidence (Noels, Clément, & Gaudet, 2004), suggesting that without L2 confidence, one cannot feasibly claim an L2 identity.

D. Social Identity, Ethnolinguistic Vitality, and the Intergroup Model

The intergroup model of L2 learning follows from Giles's earlier work on ethnolinguistic identity theory (e.g., Giles et al., 1977; Giles & Johnson, 1981), which examined the role of language in intergroup encounters in light of Tajfel's social identity theory (Tajfel, 1978). The intergroup model focuses on contexts in which minority group members (e.g., immigrants) learn the language of a more dominant, majority group (Garrett, Giles & Coupland, 1989; Giles & Byrne, 1982). It extends earlier discussions of identity and the power relations involved in language learning in at least two ways.

First, it uses a well-articulated model of social identity in which identity mechanisms and group dynamics have been clearly described and empirically tested. Social identity is construed as "that part of the individuals' self-concept that derives from their knowledge of their membership of [*sic*] a social group (or groups) together with the value and emotional significance of that membership" (Tajfel, 1981, p. 255). From this perspective, people have a predisposition to categorize information in the world, including their social world, into discrete categories. Social identity derives from knowing in which category (or categories) a person belongs and assuming the characteristics of that social group (Hogg, 1988). Identity becomes salient through comparison with other social groups, and this process of social comparison is colored by a motivational desire to see one's own group in a positive light, in order to enhance one's self-esteem as a member of a positively valued group. Language comes into play when a speech style (e.g., language, dialect, accent, etc.) is a valued component of identification and can be gainfully used to differentiate one's own group from other groups. It is noteworthy that ethnolinguistic identity is only one of a number of social identities that a person entertains (e.g., gender, age, socioeconomic status), and certain identities may be more salient in some conditions than in others. The strength of identification that one has with a language group is the prime determinant of the motivational processes to learn an L2.

Second, the model extends earlier models in that it offers a variety of predictions about the kinds of reactions that individuals may have when comparisons with a dominant language group are unsatisfactory; such insecure interethnic comparisons are considered a second determinant of motivation. In these circumstances, individuals may strategize to improve their situation. A first option, individual mobility, refers to the strategy whereby a person may try to pass out of the group into the positively valued one. To this end, various conditions permitting, the individual will attempt to acquire the relevant language characteristics of the desired group and abandon the original group.

For those who are less willing or able to put aside their original group membership, social creativity strategies may be utilized to redefine the element of comparison. Group members may decide to no longer compare themselves with a group that they have no possibility of joining and compare themselves with others within their social

group (intragroup comparisons; e.g., comparing oneself with another individual from one's group) or with other subordinate groups against which they can achieve a favorable comparison (e.g., comparing one's ethnolinguistic group with another, more recently arrived immigrant group). A second social creativity strategy is to redefine the dimension of comparison in a more positive light (e.g., a stigmatized dialect may be redefined as a symbol of cultural pride). A third strategy involves comparing the in- and outgroups along a new dimension (e.g., if an accent is stigmatized, one might compare using another dimension along which a more favorable comparison can be made). A fourth strategy, social competition, refers to the strategy adopted by individuals and collectivities who wish to reverse the perceived status of in- and outgroups on the valued dimension. An example of social competition in the linguistic domain is the language reform movement in Québec, in which the dominance of English was successfully challenged by the francophone minority.

The selection of any of these options is constrained by various perceptions regarding the relations between the two language groups. Individuals are hypothesized to most likely acquire native-like proficiency in an L2 when (1) language is not an important dimension by which they define their ingroup and/or their identification with their L1 group is weak, (2) comparisons with the other group suggest that no alternatives to the existing power structure are available, (3) the ingroup ethnolinguistic vitality (i.e., social prestige, demographic representation, and institutional support) is perceived to be low, (4) the boundaries between groups can be readily crossed, and (5) other social identities (e.g., gender, religion, etc.) are strong and satisfactory. When the converse conditions exist, persons are unlikely to gain native-like competency in an L2.

Despite its extensive consideration of the sociopolitical relations between groups and social identity concerns, the intergroup model has not received as much research attention as some other models. Although some research has been less supportive (e.g., Hall & Gudykunst, 1986), other research has found support for the importance of identification for use of that group's language (e.g., Kelly, Sachdev, Kottsieper, & Ingram, 1993), and more recent formulations that take into account the immediate communication climate have provided stronger predictive power (Leets & Giles, 1995).

E. The Acculturation Model

In his acculturation model, Schumann (1975) argued that social and affective factors are the major causes of successful L2 acquisition in informal learning contexts involving minority group members. He maintained that learners vary in the extent to which they are socially and psychologically distant from target language speakers and that this distance, or acculturation, directly predicts language learning. Two types of acculturation are differentiated. In the first, a person can be characterized as psychologically open to the target language and able to take on those characteristics, such as language. The second is more extreme, in that not only is the learner open to and receptive of the target language, the learner also regards the target language speakers as a reference group "whose life style and values he consciously or unconsciously desires to adopt" (Schumann, 1978, p. 380). Although Schumann does not expressly use the term identification, his discussion of reference groups is certainly akin to this construct.

Schumann posits a number of social (i.e., aspects of the relationship between two language groups in contact) and psychological factors (i.e., characteristics that differ between individuals). Like other models, the acculturation model suggests that the relative dominance of a group, its degree of institutional support (termed "enclosure"), and size and cohesiveness, among other things predict the extent of acculturation, and hence language learning. In discussing personal, affective factors, Schuman incorporates Gardner's notion of integrative motivation, suggesting that it may be more pertinent for language learning in situations where there is little opportunity for target language contact. Also, drawing on Guiora's (1972) notion of ego-permeability, he suggests that language learning becomes internalized into one's sense of self when a person feels that there are few inhibitions to learn the new language because the boundaries between languages are weak. The original empirical evidence for the acculturation model was drawn from a 10-month, single-case study (drawn from a somewhat larger study involving six participants). Schumann concluded that social and affective factors were more important than cognitive and age-related factors for explaining why the person's language was "pidginized" (i.e., did not attain native-like proficiency). Although it has garnered rather little subsequent research attention (see Schumann, 1990, for a review), the acculturation model nonetheless has galvanized recent critiques of power, identity, and language learning (e.g., Norton, 2001).

II. CRITIQUE OF THE INTERGROUP/SOCIAL PSYCHOLOGICAL PERSPECTIVES

Beginning in the 1990s, a number of critiques were directed at the existing models, especially Gardner's socioeducational model. One set of critiques questioned the emphasis that these models placed on intergroup relations and social identity concerns (e.g., Crookes & Schmidt, 1991; Dörnyei, 2001; Oxford, 1996). Critics pointed out that these theoretical formulations were developed in specific societal contexts and that their particular circumstances limit the applicability of these conceptual models to other contexts. More specifically, with its policy of French-English bilingualism and the greater opportunity for face-to-face interaction with members of the target language group (at least in some parts of the country), the learning of French and English in Canada was argued to represent a learning situation that was not necessarily descriptive of ethnolinguistic dynamics elsewhere. Hence, intergroup relations and social identity concerns were argued to be more salient for learners in Canada than they would be in other countries where learners have little exposure to the target language community and little opportunity to form attitudes and identities in relation to it (cf. Dörnyei, 2005). In such foreign language contexts, other factors, related specifically to the dynamics within the local classroom, were suggested to play a more important role in learner motivation, and so some researchers turned to study other cognitive motivational models from educational and social psychology. Such models focused on how one's thoughts about one's abilities, goals and expectations, attributions about past performances, and so on are related to motivation and achievement (see Dörnyei, 2001, 2005, for reviews).

Elsewhere, Noels (2001) argued that intergroup social identity models might be usefully complemented by a consideration of other self-relevant concerns. Drawing from Self-Determination Theory (Deci & Ryan, 1985), Noels argued that a sense of autonomy and personal choice (along with perceptions of competence and relatedness) is an important precondition of engaged learning, as it contributes to the internalization of the learning activity into the self-concept. Noels's findings demonstrated that social identity concerns may be more relevant for motivation in particular contexts, such as heritage rather than foreign language learning (Noels, 2005).

Others agree that the dynamics of the broader societal context impact language learning, but feel this relation is not well captured by the notion of integrativeness. For instance, Lamb (2004) questioned its utility in the context of English as a global language. He pointed out that learners may not seek opportunities to speak with native speakers of English (e.g., British, American, Australian, etc.) but rather use English as a *lingua franca* for communicating with speakers with whom no other common language is shared. In such a case, a desire to integrate with a specific English community is irrelevant; instead one might wish to integrate into a "global-English" community, associated with technological advances, education, and occupational opportunities. Citing Arnett (2002), Lamb depicts a "bicultural identity in which part of [learners'] identity is rooted in their local culture while another part stems from an awareness of their relation to the global culture" (p. 15). Relatedly, Yashima (2002) suggested that rather than an integrative motive, Japanese learners of English may adopt an "international posture" in which they are seen by others and see themselves as persons who have a broad perspective on the relations between language and culture, are well-informed of global issues and international affairs, possess little ethnocentrism and are open to interaction with diverse others, and see themselves as eventually having an international career and/or enjoying a stay abroad. From this perspective, identity is important for language learning; however, it does not concern identification with a specific language group but with a sense of the self as connected to a more global community.

Elaborating on this critique, Dörnyei (2005, p. 97) suggests that integrativeness should be recast as "a virtual or metaphorical identification with the sociocultural loading of a language, and in the case of the undisputed world language, English, this identification would be associated with a non-parochial, cosmopolitan globalized world citizen identity." Dörnyei maintains that users of World English imagine themselves as possibly becoming members of a virtual language community, such that "the more vivid and elaborate the possible self, the more motivationally effective it is expected to be" (p. 100). Integrative motivation, he maintains, should be reframed as the desired integration into such an imagined language community. This ideal L2 self is one of two self-guides that make up the L2 motivational self-system and governs the desire to internalize the L2 into one's sense of self (see also Dörnyei & Ushioda, 2009).

Still other critiques assert that the existing work on social identity and language learning has not gone far enough in its discussion of identity and power (Pavlenko & Blackledge, 2004). Although constructs such as "ethnolinguistic vitality" highlight the power relations between groups in the larger society and suggest how individuals' perception of these relations are relevant to language learning and use, it is argued that not enough work has been done to understand how persons with differential access to

power manage their identities in specific relationships. By looking at interpersonal interactions, it is possible to consider not only how control is exercised but also how and when people resist domination and act as autonomous agents in determining their language choices.

For some, the idea that identity is negotiated through social interactions is incongruous with a mentalistic metaphor of identity as an attribute in the mind of the individual. To illustrate the limitations of trait or dispositional models that have informed language learning, Norton and Toohey (2001, p. 309) critique descriptions of the "good language learner" as someone who has "a particular constellation of personality characteristics, cognitive styles, attitudes, motivations, or past learning experiences," and suggest rather that a "good learner" has the good fortune of being someone who has access to a community because of the particular practices of that community and through their ability to exercise agency in positioning themselves as persons with valuable resources, making them worth talking to and being incorporated into the community. Similarly, identity is not simply an inner attribute of a person, but a part of a social process that operates through interpersonal interactions. To reflect such social embeddedness, new vocabulary has been proposed to reframe concepts such as "identity," "motivation," "autonomy," and so on as "subjectivity," "investment," and "agency."

Another concern is the portrayal of L2 learning as typically involving a monolingual and monocultural learner who lives in a homogeneous, self-contained community with little opportunity for daily use of the L2 (cf. Pavlenko & Blackledge, 2004). For many people living in multilingual contexts, the line between learning and using a language is blurred. Moreover, the assumption of a one-to-one correspondence between language and identity is tenuous; for many reasons, people may use the languages of groups with which they do not identify. In addition, a language may be seen less as an indicator of identification with a specific ethnic group than as a means of denoting other identities, such as professional or educational background. It has also been suggested that some social identity models that concentrate on identity-language correspondences may account less readily for the hybridized identities experienced by some individuals in multilingual contexts (Hansen & Liu, 1997; Ricento, 2005).

III. SOCIOCULTURAL PERSPECTIVES³

This last set of critiques stems from scholars who have developed their ideas regarding social identity and language learning in reference to a variety of sociocultural paradigms (Zuengler & Miller, 2006). These approaches are similar in that they emphasize the social and cultural contexts of learning and focus on how language learning is not only a cognitive process, but also a social process of active participation and membership in specific language communities. In this growing body of work

³Many terms are used to describe the range of theorizing we have grouped into this domain, including postmodern, poststructuralist, constructivist, sociohistorical, sociocultural, and critical theory.

(e.g., Martin-Jones & Heller, 1996; Pavlenko, Blackledge, Pillar, & Teutsch-Dwyer, 2001), which includes a new journal created as a forum for scholarly work at this intersection (Ricento & Wiley, 2002), the social process of language learning is argued to be intrinsically connected to patterns of identity and language use in interpersonal relationships (defined primarily in terms of power).

Taking our lead from Zuengler and Miller (2006), we begin with a consideration of social identity from Vygotskian sociohistorical and language socialization perspectives, followed by Bakhtinian and critical theory points of view. These models act as a set of complementary frameworks, from which ideas are often combined in "hybrid interdisciplinarity" (Rampton, Roberts, Leung, & Harris, 2002, p. 373; cited in Zuengler & Miller, 2006).

A. Vygotskian Sociohistorical Theory

Although identity has not been extensively discussed from this perspective, sociohistorical theory suggests that when people develop new sociocultural competencies through using a new language in their social interactions, the self and identity are also transformed.⁴ Drawing on the work of Vygotsky and other developmental psychologists from the same tradition (e.g., Vygotsky & Luria, 1993), Lantolf (2007, p. 694) assumes that speech is "motivated and purposive," in the sense that it is oriented toward solving both social and cognitive problems (see also Lantolf and Poehner, this volume). Initially, speech is used to communicate with others to achieve various goals in the social and physical world. Over time, this interpersonal speech becomes internalized as "private speech," which guides action until the action becomes automatic. Learning, thus, is an interactive process between the individual and others in the sociocultural environment, carried out by imitating more expert speakers' ways of doing things and transforming these ways into one's own practices. These practices become internalized, until the learner is capable of carrying out the activity on their own, with no assistance from others.

The internalization of a new communication system affects how one thinks, including how one thinks about oneself. Pavlenko and Lantolf (2000) suggest that as learners interact with others in a new sociocultural context in a new language, they also construct an inner dialogue in the new language (i.e., a new way of thinking) that includes new ways of thinking about themselves (see also Norton & Toohey, 2002). To explain how this occurs, sociocultural theory assumes that humans have a propensity for self-regulation and independent action (Bronson, 2000; cited in Ushioda, 2006). Although the responsibility for an activity rests initially with the more experienced interactant, eventually the learner will "assume responsibility (self-regulation) for L2 performance by appropriating the assistance negotiated between herself and the expert" (Lantolf & Pavlenko, 1995, p. 115). For this internalization of

⁴We maintain that sociocultural frameworks are not necessarily antithetical to the notions of language learning portrayed in some of the intergroup/social psychological models. Indeed, Lambert found much inspiration in the papers of Vygotsky, which were published during the time Lambert carried out much of his foundational work (see Lambert, 1991).

responsibility to occur, the learner must come to view themselves as a relatively autonomous agent in the activity.

The process of internalization and agency development depends on supportive interpersonal dynamics. Ushioda (2003) draws on Self-Determination Theory (Deci & Ryan, 1985) to specify the kinds of supportive interpersonal interactions and optimal learning conditions that are necessary for autonomous action and internalization. She argues that the people in the learning context must provide a stimulating environment for the development of competence and support for the learner's eventual independence, combined with a sense of cohesion and relatedness that enables a sense of security in exploring new activities.

B. Language Socialization and Situated Learning: Participation, Apprenticeship, and Power

Language socialization research centers on how individuals become socially and culturally competent members of a society by participating in various discourse practices and interactional routines (Zuengler & Miller, 2006; see also Schieffelin & Ochs, 1986). It is assumed that learners (i.e., novices) partake in activities with more experienced persons (i.e., experts), who tacitly or explicitly display expected ways of thinking, feeling, and acting (see Zuengler & Cole, 2005, for an overview). Through such exposure and participation, novices internalize these ways of being (which include principles of social order) until they too become experts in that context. This internalization of social order, community practice, and cultural knowledge takes place primarily through the use of language (Garrett & Baquedano-López, 2002, p. 339).

Included in this internalized belief system is the person's own identity and position within the community. According to Ochs (1993), social identity is "a cover term for a range of social personae, including social statuses, roles, positions, relations and institutional and other relevant community identities one may attempt to claim or assign in the course of social life" (p. 288). She maintains that speakers establish their social identities and those of other people by performing verbal acts and displaying particular stances, the meanings of which are conventionally recognized. Social identity, then, is not explicitly encoded in the verbal message, but inferred from one's understanding of the conventions that are associated with the linguistic construction.

Although not language socialization theorists *per se*, Lave and Wenger (1991; Wenger, 1998) usefully articulate the importance of identity in learning through their discussion of the role of communities of practice and legitimate peripheral participation. For Lave and Wenger, "community of practice" refers to patterns of mutual social interaction directed toward a joint enterprise, involving habitual ways of using material and symbolic resources in a specific context. At any point in time, a person belongs to multiple communities, the boundaries of which are permeable and dynamic. The conception of "legitimate peripheral participation" refers to the process of social engagement in particular social/learning practices. Participation in a community of practice necessarily entails learning, which is conceptualized as a process of evolving participation in numerous and overlapping communities of practice.

To understand what it is that people learn (including how well they learn a language), it is critical to understand the kinds of social interactions that are possible, given the power dynamics of a particular community. Within a community, a learner may have a more or less desirable or powerful position, and what is learned is shaped by the positions that the learner occupies. Identification (with a position) is important because it can restrict or extend a person's opportunities to fully engage in a range of conversations, especially those that are critical to acquiring a new language.

Toohy's (2000) research on children acquiring English within a western Canadian classroom illustrates these points well. Toohy notes that current practice in many classrooms involves ranking students on the basis of several criteria, including academic, physical, social, behavioral, and linguistic competencies, and she maintains that such practices place the students in identity positions (akin to roles) that have differential access to resources in the classroom. As a result, students have greater or fewer opportunities to participate in the activities and conversation in the classroom, which ultimately constrains the kinds of things, including language, that can be learned.

C. Bakhtin and Dialogism: Appropriation and Voice

Rather than viewing language learning as the internalization of a rule system and vocabulary items, scholars interested in language learning from Bakhtin's (1981) dialogical perspective emphasize that learners appropriate the utterances of the people with whom they engage and transform them to serve their own needs. Interactants mutually construct a set of interrelated utterances (the "dialogue"), and in this process, learners "try on" the language of other people, assessing how well the turns of phrase and other aspects of style serve their needs (Toohy, 2000). Language from this perspective is not a neutral medium; it is packaged with particular histories of use by other people (Hall, 1995), and hence inherently ideological. Each utterance indicates one's perspective on and relationship with other interlocutors. Thus, when learners practice and eventually master others' language, they simultaneously acquire its various associations, including political ones.

The self, then, is a dialogic phenomenon. As Vitanova (2005) poignantly emphasizes, newcomers who are unable to use a target language proficiently are constrained in the way in which they can author their selves. Their lack of proficiency may undermine their prior self-conceptions, an experience often associated with a strong negative "emotional-volitional tone"—feelings, desires, and moral evaluations. As newcomers begin to better understand their environment and its constraints ("responsive understanding") along with their new "voice," they can be more agentic and creative in authoring themselves in ways that fit in with the contextual constraints ("creative answerability") or possibly contest others' voices and resist attempts to position them undesirably. "To be a person is synonymous with having a voice, being heard, addressed, and responded to" (Vitanova, 2005, p. 163). Day's (2002) ethnographic case study underscores the capacity of even very young learners to claim such an authoritative voice.

D. Critical Theory: Imagined Communities, Investments, and Agency

Perhaps the best known treatise on social identity and language learning from a critical theory perspective is Norton's (2000) examination of immigrant women learning English in Canada. Norton draws on Weedon's (1987) notions of subjectivity to define identity as "how a person understands his or her relationship to the world, how that relationship is constructed across time and space, and how the person understands possibilities for the future" (p. 5). Identities such as gender, class, and so on overlap and intersect with one another, and hence it is necessary to take this multiplicity into account to explain language learning.

Along with multiple identities, people have multiple goals and desires. Often these can be in conflict with each other. For this reason, Norton questions the utility of construing motivation as a characteristic of an individual and describing them as more-or-less motivated (e.g., Norton & Toohey, 2001). Rather, she argues that the term "investment" better captures the idea that learners choose to distribute their efforts in relation to the options and constraints that are available. "... Learners invest in a second language ... [in order to] acquire a wider range of symbolic [e.g., education, friendship] and material [e.g., money] resources, which will in turn increase their cultural capital [e.g., knowledge]" (Norton, 1995, p. 17; cf. Bourdieu & Passeron, 1977). People invest in language learning only if they believe that their efforts will bring about commensurate returns. Because it emphasizes that both costs and benefits must be weighed in any given interaction, the concept of "investment" captures well the ambivalence some learners experience about learning and speaking another language.

Investments are closely linked to social identity (Norton, 2000). When learners speak with different people, they are conscious of the types of investments to be made, and hence they continually organize and reorganize a sense of who they are in relation to the social world. For example, a woman may identify as immigrant, mother, and language learner, among other identities, some of which may be in conflict with one another and/or in conflict with others' imposed identities. Depending on the importance of that identity investment at that time and place, one may choose or refuse to use a new language. Moreover, Norton (2001; Pavlenko & Norton, 2007) further theorizes that identities are not necessarily restricted to the here and now, but include potential identities projected into the future. For example, a new immigrant may imagine herself as currently a language learner, but also as potentially belonging in a community of professionals.

Norton cautions, however, that learners cannot claim identities unilaterally. Other people, particularly those who might be construed as gatekeepers of that desired community (and hence identity), can dismiss or invalidate the image in which the learner is so deeply invested; even though the learner may believe she has a legitimate claim to status in the imagined community, she cannot take this status for granted because others may attempt to impose other identities that undermine that claim. Hence, depending on the extent of investment in particular identities, one may choose to speak or not speak, thereby accommodating, ignoring, or altogether resisting identity impositions. Social identity is thus often a "site of struggle," between competing interests within the person and others in the social context. Such an analysis underscores Norton's notion of agency not as a characteristic of the individual, but as

how an individual utilizes her resources and power to access a community and, correspondingly, how community members offer or deny opportunities for that access.

IV. SOME POINTS OF CONVERGENCE

We have presented several major approaches to the study of social identity and language learning in some detail to counteract the failure of several previous reviews to fully describe this field's diversity (e.g., Hansen & Liu, 1997). In other reviews, only nascent formulations are recounted, although these models have evolved through productive research programs over several decades (e.g., Ricento's [2005] critique of Gardner's socioeducational model). In other cases, early formulations have proven easy targets for critique because they received little examination since they were first proposed (e.g., Norton's [2000] critique of Schumann's acculturation model). Cursory summaries contain inaccuracies and misleading interpretations (e.g., Ricento's [2005] claims that social psychological models are "unwittingly assimilationist" when, in fact, beginning with Lambert, many earlier models clearly articulate that linguistic and cultural assimilation is not a necessary outcome of language learning).

Moreover, a detailed description of various approaches opens the possibility of seeing points of convergence between perspectives. Without such a consideration, we may leave behind issues and concerns that merit further analysis and/or reinvent formulations that have been already contributed by others. We thereby lessen our opportunities to achieve new insights into that which is our common pursuit. As stated by McNamara (1997, p. 566), some current work "simply misses the opportunity to connect with relevant work, like ships passing in the night."

We elaborate on three themes articulated by McNamara (1997) that demonstrate some commonalities across these different perspectives: "the notion of a repertoire of social identities, the transformation of social identity associated with changes in the intergroup contexts in which social identity is negotiated, and the conflict perspective on intergroup relations" (p. 565). The first theme refers to assumption of a multiplicity of group membership, including ethnicity, language, gender, and other identities. As noted earlier, these identities intersect in complex ways. In some circumstances, however, certain identities may be more salient than others, and for some individuals, particular identities may be more or less central to their sense of self.

The second theme concerns the changeability of social identity. An assumption, implicit or explicit, underlying most of the theorizing discussed in this chapter is that the sociopolitical context is interwoven into the fabric of identity and the self. Social psychological/intergroup schemes tend to portray context as the sociopolitical dynamics between groups in terms of objective or perceived societal indicators (e.g., "ethnolinguistic vitality"), although other contextual aspects are sometimes considered. From this perspective, general tendencies are surveyed in order to elucidate how individuals' choices relate back to large-scale, societal dynamics. Sociocultural theories focus on the immediate social interaction, providing a window on the dynamics in the more immediate context. This view reveals how people use various languages, including those with which they claim little or no affiliation, to create and contest

identities. Common to both perspectives is the idea that because the context is potentially changeable, identity is also changeable. This emphasis on the dynamism of identity has done much to counteract conceptions of an "authentic" self as an immutable structure of particular attributes. At the same time, it should not be overlooked that some identities are experienced as relatively stable over time, an "existential fact" (Menard-Warwick, 2005). This often-noted dialectic between change and constancy merits further theorizing (cf. Noels, 2009).

The third theme revolves around the notion of conflict. As pointed out by Ricento (2005), Tajfelian definitions of social identity posit a conflict model of intergroup relations, such that the perception of threat accentuates differences between groups of people. This focus on conflict is also evident in recent sociocultural research concerning the importance of human agency in "the negotiation of identities which takes place only when certain identities are contested ... [that is,] in instances where individuals resist, negotiate, change and transform themselves and others" (Pavlenko & Blackledge, 2004, p. 20). Although the emphasis on conflict serves to alert the reader to the need for social change, each of these approaches overlooks the day-to-day constructions, negotiations, and performances of identity that may be less discordant and controversial, and may thereby limit the range of identity experiences we articulate, including identity hybrids (see Dallaire & Denis, 2005).

Moreover, this focus on conflict and power struggles might well mask other issues that bear on social identity. For instance, we might wonder how affiliation and nurturance dynamics are involved in identity processes and how agency and autonomy are linked not only to self-assertion in interpersonal relationships, but also to personal growth through creative and curious exploration. What are we missing if the analytic focus is primarily on power as the defining characteristic of human relationships?

There has been some attempt to unify these two broad perspectives on identity. For instance, Dörnyei's (2005) discussion of the L2 self combines Gardner's notion of integrativeness with Norton's idea of imagined communities by drawing from Markus and Nurius' (1986) work on possible selves (see also Dörnyei & Ushioda, 2009). But there are limitations associated with borrowing in this way from the existing literature on the self, not the least of which is that this body of work is so large that it becomes difficult to choose and integrate the various self-related constructs (MacIntyre, MacKinnon, & Clément, 2009). Another promising approach is to celebrate the diversity of theoretical perspectives that can inform our understanding. In their analysis of language teacher identity, Varghese, Morgan, Johnston, and Johnson (2005) comply with Feyerabend's (1988) admonition to incorporate a multiplicity of theories and illustrate how social identity theory, situated learning theory, and poststructural notions of image-text highlight and hide different aspects of identity.

V. FUTURE DIRECTIONS

A. Importance of a Comparative Perspective

Ricento (2005) suggests that much L2 research from the 1960s through the 1980s presupposed conflict in the language contact situation, and indeed, many of these

theories were developed in contexts in which there was considerable intergroup conflict. As a case in point, Lambert and Gardner first postulated their theories during the 1960–1970s in Canada during a period known as the Quiet Revolution, during which time Québécois asserted their civil rights in the face of an oppressive sociopolitical situation. Inspired by Tajfel and other European social psychologists whose ideas regarding intergroup relations and social identity were formulated in postwar Europe, Giles's notion of ethnolinguistic identity was forged in the light of Welsh–English conflicts. These examples underscore the fact that social scientific theorizing is framed by the context within which the theorist lives and works. Much of the recent scholarship on identity and language learning has been articulated in the context of immigration, colonization, and globalization, often with English as the focal language. This context would certainly bring to light themes that are less prominent in other contexts. For instance, work on immigration and the learning of English generally reflects a situation in which a learner is vested in becoming a part of a new society, and mastering the local language is crucial for acquiring capital of different kinds. The experience of integrating into a new society and developing a new, possibly hybrid, identity is likely quite different than the experience of Quebec Anglophones and Francophones caught in conflict during the 1970s.

This extension of scholarly inquiry to the ESL/EFL context has brought new momentum to the field: It brings to light new issues and makes salient the limitations of previous models. But it is also important that we not forget that these new understandings are likewise constrained by the specific language contact situation. For the field to develop, we need a cross-contextual perspective to better ascertain the applicability of conceptual frames outside the realm in which they were developed. Concurrently, we should resist the impulse to quickly dismiss frameworks that were developed in other contexts and hence lie outside the purview of our own experience and expertise. As we continue to compare language-learning experiences across a variety of contexts (e.g., those with transnational allegiances, those who live in borderlands, heritage language learners with different degrees of ancestral relatedness, advocates for the use of auxiliary and “dead” languages, foreign language students, and so on), likely new dynamics will present themselves, requiring us to draw from other frameworks and/or develop new theoretical perspectives to articulate the range of issues that learners in the various contexts face. Unlike Ricento (2005), then, we do not see this context specificity as a “bias” that plagued early models, but as an integral part of scholarly inquiry and an important consideration that must be taken into account in theory development.

B. Multiple/Mixed Methods and Triangulation

An important development is the growing diversity of research methods used to analyze the issue of social identity and language learning. While questionnaires and interviews remain standard information-gathering tools, participant observations, personal narratives (see Pavlenko & Lantolf, 2000), collective stories (Lin, Wang, Akamatsu, & Riaz, 2002), and other qualitative methods are becoming increasingly common, and still others might prove useful. For instance, visual research methods (see Stanczak, 2007, for an overview) might not only facilitate communication between

researchers and participants who do share not a common language background, but also broaden researchers' understanding of the contexts in which learners live and learn. Ethnographies have underscored the value of a long-term perspective, and certainly other research methods could benefit from longitudinal designs, particularly as quantitative analytic techniques in developmental science become more sophisticated (e.g., multilevel modeling and latent growth curve analysis). Apart from these qualitative methods, experimental and quasi-experimental designs, in which certain conditions are created or sampled to examine their effects on behaviors of interest, have been underutilized. Perhaps one of the most important methods by which we can understand better the dynamic and interactional aspect of language learning is through conversation and discourse analysis of dialogues between learners and significant others (e.g., teachers, peers, members of the L2 community) in dyads and groups, in and outside the laboratory setting.

This diversity in methodological approaches is important in a field that values both empirical and interpretive aspects of scholarly inquiry: empirical in the sense that knowledge is gained "from experience," through our senses, most often through observations of others, "measured" or otherwise; and interpretive, in the sense that we derive meaning from those observations. As stated by Brydon-Miller and Tolman (1997, p. 804), "multiple methods of research enable us to know through different sorts of experiences, and ideally these methods would comprise all social scientists' repertoire." In a less-than-ideal world, it is likely that many researchers will continue to work with those methods with which they are more comfortable and familiar. For some, their ontological and epistemological orientation prescribes a particular methodology; for others, restricted time and resources simply preclude developing an expert understanding of more than a limited number of techniques. Acknowledgment of such human limitations compels us to emphasize the importance of collaborative endeavors between researchers with different capacities and the value of regular review papers that synthesize collective understanding and articulate points of dispute.

VI. CONCLUSION

The study of social identity and language learning combines robust theoretical approaches using traditional social psychological techniques with newer formulations that have benefited from the application of methods often used in other disciplines. This combination offers great potential for the generation of new ideas, new knowledge, and new practices in the study of language learning and social identity.

A cautionary note is perhaps in order. To our mind, the most worrisome impediment to such a prospect is not the incommensurability of different ontologies, epistemologies, and methodologies as much as the confrontational discourse that runs through some of the scholarship in the area. In our view, critique is an important part of developing new ways of understanding how the social world is implicated in language learning. But too often, such critique is dismissive of less preferred approaches, sometimes subtly and sometimes with open hostility. This tendency is not restricted to a "positivistic" old guard defending their dying empire; indeed, it is most

disturbing to hear polemic positions advanced by constructivists, those who elsewhere would argue that essentialist, categorical descriptions of any human practice are problematic. While such positioning serves a rhetorical function of clearly demarcating differences, the confrontational style fails to recognize, acknowledge, and consider diversity within perspectives, and more regrettably potentially shuts down constructive discussion. An alternative approach is to engage in a dialogue that opens the possibility of collaboration and transformation. As we noted in our review of the broader area of the social psychology of language (Noels, Giles, & Le Poire, 2003), high-spirited discussion should make us all more sophisticated in our thinking about the nature of the "social," "identity," "power," "motivation," and "language." "Even if peaceful coexistence and complementarity prove elusive, and the transformation of knowledge appears distant, this condition of multiple perspectives is not an entirely undesirable state of affairs. Through their dialectic, each perspective can at least serve to keep the others honest and humble about their truth claims" (p. 247).⁵

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⁵This admonition for humility must be attributed to a wise scholar whose name the first author has unfortunately lost track of.

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