

УДК 81'246.2

BILINGUALISM: CONCEPTUAL AND PRACTICAL CONSIDERATIONS

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У статті представлено огляд основних понять, які стосуються білінгвізму та його видів; розкрито зміст явища міжмовного трансферу як невід'ємної частини взаємодії мов білінгва та чинників, які можуть його посилювати; описано програми мовного занурення, що успішно застосовуються у Канаді з метою формування раннього білінгвізму у дітей у шкільних умовах.

Ключові слова: двомовність (білінгвізм), засвоєння M1/M2, міжмовний трансфер, інтерференційні помилки, програми мовного занурення (іммерсійні програми).

В статье рассматриваются вопросы двуязычия и его основных видов; проводится анализ межъязыкового переноса, который является неотъемлемой частью взаимодействия языков и может проявляется как в транспозиции, так и в интерференции; описываются основные виды ошибок, вызванных межъязыковой интерференцией, а также факторы, усиливающие эти ошибки; рассматривается опыт Канады в развитии раннего билингвизма у детей с помощью иммерсионных языковых программ.

Ключевые слова: двуязычие (билингвизм), усвоение Я1/Я2, межъязыковой перенос, ошибки как результат интерференции, иммерсионные языковые программы.

This article provides a concise overview of the international research literature on bilingualism and bilingual immersion education. The author describes what bilingualism is, mentioning its basic types, positive and negative effects of contact between the languages spoken by a bilingual, and the general ways to apply theoretical knowledge in practice in home and educational contexts.

Key words: bilingualism, L1/L2 acquisition, language transfer, interference errors, immersion programmes.

INTRODUCTION

Bilingualism is a personal enrichment and a passport to other cultures.

Francois Grosjean

Bilingualism is a benefit and a resource, both for individuals and the wider society, which should be maintained and fostered. But how to raise a bilingual? - that is the question that teachers, methodologists and parents face while searching a fruitful and versatile teaching technique. In order to find the most effective approaches to promote long-term bilingualism and biliteracy, many theoretical facts about bilingualism and its effects on cognitive development of an individual should be taken into account, so that practical strategies will be based on a solid foundation of precise theoretical principles.

The aim of this article is to present the basic notions of contemporary bilingualism research. Our review will be organized around three issues: (1) the attempt to explain what is bilingualism in general and what are its particular types; (2) the phenomenon of bilateral impact

of languages of a bilingual individual which is reflected in language transfer and interference errors; (3) basic strategies how to raise a bilingual at home or at school (on the example of Canadian immersion programmes).

In our deepest conviction, the importance of the research is obvious, since nowadays proficiency in only one language is not enough for economic, societal and educational success. It results in a strong need in the society for bilingual education programmes. To make second and foreign languages education successful, methodologists have to conceive the theoretical foundations of different fields of sciences concerning two languages acquisition, alongside with the foreign experience of bilingual education successfully applied in academic settings.

The foregoing research in this area has by now been abundant, but still not sufficient enough, as many of the aspects of bilingualism are very obscure in nature and difficult to prove, as well as they may vary significantly from person to person and even by the same person in different emotional or physical states (e.g. child

bilingualism, impact of a bilingual's proficiency in his first language on his successes in the second language acquisition, or individual predispositions which can reinforce or subtract the acquisition). These issues still remain open and before any profound research has been carried out, we can only speculate about them.

Among the prominent linguists who studied bilingualism in the early and middle 20th century, Bloomfield, Haugen, Weinreich, Darcy, Saer can be named; Grosjean, Klein, Genesee, Cummins, Ellis, Hoffmann are leading authorities on bilingual education and research of the present times. Huge contribution to linguistics was made by Noam Chomsky who is frequently cited in connection with his concepts of transformational generative grammar. Lev Vygotsky is also an important figure in the international bilingualism domain for his study of psychology and cognitive development of children as well as concepts of interrelation of language development and thought.

At the very beginning, we want to introduce the shortenings widely used in the linguistic literature:

L1 (from *Language 1*) – the symbol for the first language acquired by a child;

L2, L3 and so on – symbols referring to the second, the third and the next acquired languages.

It should also be kept in mind that the second language (L2) does not mean the same as a foreign/target language. The latter is studied as one of the subjects on the curriculum; it is not used for educational or communication purposes either at classroom settings or in informal situations. In its turn, the term *second language* is used in relation to the situations, when some school subjects e.g. Mathematics, Physics, Geography etc. are taught in it or it is used by a person in natural environment, with communicative or other intentions.

1. WHAT IS BILINGUALISM?

Why is it so difficult to define bilingualism? One of the reasons is the complexity of language behaviour influenced not only by speaker's linguistic knowledge, but also by his emotional state during a particular act of communication as well as by the social values of a certain environment [3, p. 7]. As with most cognitive and linguistic processes, bilingualism is an extremely complex phenomenon which can vary widely from person to person. As Charlotte Hoffmann points out [3, p.17], its other cause lies in the interdisciplinary character of bilingualism study. Scholars from the academic fields of sociology, psychology, most branches of linguistics including pragmatics, ethnology, anthropology, education etc. study various aspects of bilingual situations and, as a result, offer different definitions (see further discussion of this: 3, p. 14–32).

There are even such distant, if not to say opposing views on the concept of bilingualism, as *maximalist* and *minimalist* stances. They are based on the criterion of language competences, i.e. how proficient a person is in L1 and L2. According to the former, bilingualism is a "near-native control of two or more languages" (such viewpoint was especially popular in 30–60s years of the 20th century among early bilingualism researchers e.g. Bloomfield, Oestreicher, Christopherson), while the latter sees it as "the point where a person can first produce complete meaningful utterances in the other language" (e.g. Haugen supported such a definition) or has at least minimal degree of one of the language

competences, either speaking, writing, reading or understanding speech (e.g. Macnamara) [3, p. 20–21]. One view is obviously too narrow, while the other is too broad to be of much help.

As it turns out, there exists no explicit formulation of bilingualism. In this paper however, under a bilingual/multilingual person we shall understand any individual who is able to use two (or more) languages for either communicative, academic, business or any other purposes, without defining how well the languages need to be known. Such approach to the notion of bilingualism is supported by the majority of contemporary researchers (see, for instance: [6, p. 180; 3, p. 16; 2, p. 509; 9, p. 43]).

Rather than to look for the best definition of this complex concept, it appears more informative to describe a **bilingual profile** for a person or group which takes into account key attributes of bilingualism (cited after: [3, p. 31]):

- 1) language development, maintenance and/ or loss of L1/ L2;
- 2) sequential relationship of L1 and L2, i.e. whether they are acquired simultaneously or subsequently;
- 3) language competence, i.e. degree of proficiency in L1/L2 and language dominance;
- 4) functional aspects of language use: what, when and to whom L1/ L2 are used;
- 5) linguistic features, such as code-switching, borrowing and interference;
- 6) attitudes towards L1/ L2, speakers of L1/ L2 and bilingualism itself;
- 7) internal and external pressures (motivational, social, psychological etc.);
- 8) environmental circumstances surrounding the bilingual;
- 9) biculturalism, i.e. degree of familiarity with the cultures of L1/ L2.

All these components indicate if a person is capable of performing in both languages, in which situations and how successfully. Only considering the unity of all the mentioned above aspects, we can ascertain an individual as a bilingual.

SOME TYPES OF BILINGUALISM

Awareness of bilingualism basic types together with the comprehension of their nature, are essential for further discussion. Therefore, let us have a little more detailed look at them:

According to the age of L2 acquisition, simultaneous and sequential types of bilingualism are distinguished. If a child has been exposed to both languages since their infancy (or before the age of 3), this is simultaneous language acquisition (or simultaneous dual language development as, for instance, Genesee puts it, together with the other generally used term meaning the same: bilingual first language acquisition (see e.g.: [5, p. 102])). It is a typical situation for mixed marriages, where parents are native speakers of different languages and want their child to acquire both of them [8, p. 143; 5, p. 102]. If a child begins L2 being older than three-four years old, it is known as sequential bilingualism, because in this case much of L1 is already in place. In its turn, sequential bilingualism is divided into sequential child L2 acquisition which takes place before an individual's adolescence period, and sequential adult L2 acquisition occurring after adolescence [5, p. 102].

· Balanced and dominant forms of bilingualism deal with the level of proficiency a bilingual has in their L1/ L2. A balanced bilingual is someone who is more or less equally proficient in both languages, but will not necessarily be as good as a native speaker. On the other hand, a dominant bilingual is a person who is more proficient in one of the two languages (in most cases native-like); they are capable of communicating in their weak language, but are dominant in the other [6, p. 181]. A bilingual may have spoken both L1 and L2 from childhood, but one language has still come to dominate. This may be because the dominant language has been used more regularly in the particular language context (e.g. for academic purposes or for home use). With reference to the very young children, whose language development is still an on-going process, the concept of *preferred language* is used, while in relation to older bilinguals the term *language dominance* is applied to describe the same phenomenon [3, p. 92].

· Complete (or proficient), partial and limited types of bilingualism are based on the absolute or relative L1/ L2 mastery. Complete/proficient bilingualism implies native-like linguistic competences in both L1 and L2, including literacy, culture awareness, use of communicative devices in a certain linguistic environment. Partial bilingualism seeks fluency and literacy in both languages in all domains, but so far the child has achieved age-appropriate proficiency only in one language, while the other remains in its weaker form. Finally, in limited bilingualism an individual lacks sufficient language and communication skills in both languages [6, p. 181].

To describe a bilingual with high language competences, Halliday, McIntosh and Stevens introduce the term *an ambilingual* (or an equilingual) – it is a speaker who has complete control of two languages, which means is at the same time both a complete and balanced bilingual. Needless to say, it is rather an abstract model, since rarely do people have identical linguistic input and output in both their L1 and L2 or use both languages for the same purposes and in the same context [3, p. 21].

The term *semilingualism* concerns limited bilingualism, and means that a person has low level of language proficiency and communicative skills in both languages [ibid., p.28]. *Semilingualism* may be either dominant or balanced, but the key determinant here is that a semilingual encounters difficulties in thinking and expressing themselves in either language. They may also produce grammatically incorrect utterances or have very limited vocabulary in both languages.

· Additive and subtractive forms of bilingualism reflect the changes in the individual's linguistic proficiency and communicative ability, which take place with L2 introduction. If these changes are positive in character, we speak about additive bilingualism. In this case, L2 acquisition enriches a person's L1 knowledge as it offers social, cognitive and linguistic benefits. The term *subtractive bilingualism* describes the adverse situation: the more proficient an individual becomes in L2, the more skills they lose in their L1 [3, p. 21; 4, p. 165]. This is especially typical for the situations when L2 enjoys higher prestige in the situational environment of the bilingual and is more socially acceptable than L1; therefore, the person cannot see the benefits of

mastering L1 which leads to it becoming weaker and weaker and subsequent losses of its competences. This phenomenon is also called *language attrition*.

· *Élite bilingualism* – occurs in families who change their country of residence relatively often or when a child is sent to be educated abroad. In case of adult bilingualism, a person freely chooses to become bilingual for career/ business/ academic or other benefits and the term *elective bilingualism* is used for it. L2 acquisition proceeds unhindered, with the two languages receiving wide social support and L1 enjoying firm and stable position. Progress in L2 is usually much approved while failure brings about no serious consequences [3, p. 47].

· *Ida Kurcz* also mentions coordinate and compound forms of bilingualism [6, p. 183]. Coordinate bilingualism occurs when L1 and L2 don't interact, since the person acquires them in different situational environments, e.g. L1 serves as a home language while L2 is learnt and/ or used at the academic settings. In case of compound bilingualism, there is a permanent contact between the two languages, with no particular time, place, person or situation attributed either to L1 or L2. It may be found in bilingual families and among minority groups, where all members of a family or community speak both L1 and L2 using them in turn for their special needs [ibid., p. 183].

· The distinction between societal and individual bilingualism/multilingualism should also be made. India, Switzerland, Belgium are multilingual countries, Canada and Finland are officially bilingual, while Paraguay and Luxembourg are examples of both official bilingualism and diglossia and triglossia correspondently. The paradox is that there are actually fewer bilingual people in bilingual countries than there are in so-called unilingual ones [3, p. 13]. It can be explained by the fact that the state policy in bi- or multilingual countries often guarantees use of two or more languages in education and state institutions, without promotion of bilingualism among its citizens. The general tendency in Europe shows that bilingualism among individual speakers of larger countries is less frequent. There can be a dozen of languages spoken by sizeable communities in France and Germany, and over a hundred in Britain, but, in spite of this, the majority of Britons, Germans and French people are monolingual in the sense they use only one language for their normal day-to-day communication [ibid., p. 2].

To accomplish the presentment of bilingualism basic types, we would like to add a few comments.

Firstly, a language is not something which, once acquired, remains in the same state forever. On the contrary, it is a dynamic system which can develop under favourable circumstances or undergo attrition under disagreeable ones. Certain situations can support temporal development of L1, even at the cost of L2, which can be later compensated by the beneficial opportunities for L2 advance. G.J.Berko and N.B.Ratner give an example of a bilingual child, whose L1 is home language (Spanish) and L2 is school language (English). Having begun school, the boy started speaking English much better than Spanish. However after visits to monolingual relatives in Mexico, his Spanish usually started to dominate over English [2, p. 483]. Here we can see samples of change of a dominant and a weaker language.

Secondly, it is quite natural for a bilingual to have a dominant and a weaker language or have certain linguistic qualifications better developed in one of the two languages. Thus, an individual may have better literacy skills in L2, but may decide to select L1 for telling jokes, participating in a role-play or quoting someone else. The topic of a discussion may also determine the language choice [ibid., p. 483; 3, p. 88–93]. Having preferences of such kind does not at all exclude proficiency in the other language, but serves the aim of conveying a particular meaning or having a certain effect, for instance, a humorous one [3, p. 92].

Finally, the choice of the language by older children and adults may be influenced by a psycholinguistic reason: the speaker chooses the language they are more confident in. They may as well bear in mind the frustrating experience of not being able to express their thoughts in one language, so they select the other language to avoid the unpleasant emotions. This factor is especially noticeable when the bilingual's competences and skills in both languages are not equally balanced [3, p. 88–93].

Stylistic means of bilinguals in each language may also differ. Due to separate areas in which the languages are used (e.g. L1 for home use/ communication with friends, L2 for formal situations, such as business or studying) speakers may have acquired more colloquial style in L1 and more formal in L2. As a result, they are capable of using "polite expressions" and certain forms of address for specific purposes only in one language [3, p. 93]. This example demonstrates the necessity of acquisition not only a language but also the cultural norms and values of its native speakers, and it shows the complex nature of bilingualism.

All the mentioned above determinants are certainly interrelated and, as we have already mentioned, form an inseparable unity.

2. LANGUAGE TRANSFER

There is much evidence from various studies that L2 learners are much influenced by their L1. On encountering complex semantic problems while realising their communicative intentions, an individual tends to adjust the structures of L1 for their response production in L2. This process is known as language transfer. It is divided into positive transfer or facilitation, which helps learners acquire properties of the target language or L2. However, knowledge of L1 may also hinder learners in their progress with L1. This is negative transfer, or interference, providing to interference errors [2, p. 485; 7, p. 27–28; 1, p. 342].

As G.J. Berko and N.B. Ratner reasonably point out [2, p. 485], the more similar the languages are, the more positive facilitation occurs. The acquisition of structures similar in both L1 and L2 makes learners no difficulties, as the new L2 experience is just the same as it has been within L1. Consequently, the tempo of developing similar language and communication skills is apt to be rather fast. However, in cases with unlike language structures, the teacher should foresee certain difficulties in their understanding and acquisition, anticipate probable errors and devote more time for practising this language material [ibid., p. 485].

Negative interference is especially vivid by the children with bilingual L1 acquisition. In the initial stage, having a balanced contact with both languages and

acquiring them in the way similar to that of monolinguals, the child is most likely not to separate the language systems of L1 and L2, treating them as a unity. That fact explains the mutual two-way transfer L1–L2, particularly on the lexical level. In case when L1 is dominant and L2 is weaker, frequent are the cases of L1 vocabulary introduction into L2 grammatical system with tendency of fossilization of such mistakes in later stages [8, p. 144–146]. Nevertheless with time, persistence and developing of metalanguage awareness, children begin to separate the language systems and negative transfer gradually subsides.

Levels of Interference

Interference may happen at four levels: phonological, grammatical, lexical and spelling.

Interference at the phonological level is called „a foreign accent" and this is the first thing which catches the ear of a native speaker, indicating the interlocutor to be a foreigner. Adult bilinguals acquire phonological aspects of L2 with greater difficulties than children, who being exposed to L2 linguistic environment, successfully adapt L2 pronunciation, especially its intonation [3, p. 96–97].

Interference at the grammatical level involves word order, the use of pronouns and determiners, prepositions, tense, aspect and mood. Prepositions seem to make the children most problems: researches show that not only bilingual, but also monolingual children tend to make mistakes using them. That's why it is still not clear if the language transfer has any influence on their acquisition [ibid., p. 97].

Interference at the lexical level happens when bilinguals borrow a word from one language to use it in the other language. The borrowed item may even be "fitted up" with the appropriate morphology as if to adjust it to the rules of the other language. Thus, Ch. Hoffmann provides the following example: her Spanish-German-English speaking child created "el bello" for the Spanish "cinturyn" originating from English "a belt" among others [3, p. 99]. The feel for the language helped the child to stylistically fit this creation into the morphological system of the correspondent language. Idioms and their direct translation from L1 (usually the dominant language) into L2 (the weaker one) may also create difficulties [ibid., p. 100].

Interference in spelling is the transfer of writing conventions from one language to the other (e.g. forgetting to use capital letters for the main parts of speech by English-German speakers).

In recent studies, there is a tendency to differentiate between interference, borrowing, mixing and code-switching which are based on different aspects of L1 and L2 mutual impact. But, as if often happens in the fields of linguistics, there are no clear-cut distinction or commonly agreed approaches to the issue [3, p. 95–96]. We will briefly mention that interference seems to be more involuntary; a bilingual is rather not conscious of its presence in his output, so it remains in his speech while speaking to monolinguals. Code-switching, code-mixing and borrowing concern presence of elements of two languages (codes) within one utterance; they are less automatic and a bilingual is aware of their presence in his speech, trying therefore to avoid them while conversing with a monolingual so that the conversation is not disrupted [ibid., p. 96].

Which factors can facilitate negative transfer?

Out of the abundance described in psycholinguistic literature, we chose the most significant to our point of view:

1. It has been observed that children tend to mix more if they are frequently exposed to mixed speech [3, p. 95]. So, bilingual parents or care-givers should mind their own language while communicating with the child if they want to help them acquire the languages in the separate way.

2. Besides, both children and adults demonstrate more interference errors, namely significant non-native accent and choice of wrong words, when they are fatigued or excited [3, p. 92].

3. The degree of lexical interference increases when children are aware of being tested, when a time limit is set and when testing is done in a quick succession [ibid., p. 99]. It may reveal the negative influence of need to perform under pressure on children's ability to concentrate on the form of their utterances.

4. An interesting fact is that language interference usually escalates among the group of bilinguals with the same L1 and L2 [9, p. 53–55; 3, p. 95].

5. With children, interference errors are more affluent during oral informal communication than in learning settings or during written production. This can be due to the fact that during oral discourse the children are more relaxed as well as they control what they say less, and the sense of utterances is much more important than their form [1, p. 344].

Finishing this part, it is worth mentioning that advisors against child bilingualism use negative transfer and interference errors as their most decisive argument against raising children bilingual. However, our opinion is that the nature of bilingualism is too complex to be measured just by the purity of the language output and that bilinguals should be looked upon holistically, taking into account communicative, cognitive, cultural and other benefits, which bilingualism brings about.

3. FROM THEORY TO PRACTICE

As we have mentioned above, parents can help their children in developing bilingual competences. The paramount principle is to keep the languages apart which means not to switch codes within one utterance or conversation. Hoffmann explains the vital importance of such separation: "There are suggestions (not proved empirically however) that mixed input is more likely to cause mixed speech. And there is a popular belief that those who consistently mix languages are not capable of keeping them apart, i.e. that they somehow have a language deficiency".

There are three main strategies how to isolate the languages:

1. "one person – one language";
2. "a certain place – a certain language";
3. "a certain time – a certain language".

One – Person – One – Language Strategy concerns situations when a father always uses, for instance, L1 and mother L2 for communication with their child. As Hoffmann denotes, there is evidence that children who have acquired L1 and L2 from different people show less language mixing than those who have acquired them in "fused" contexts. A child learns to use a person as a reference point, i.e. chooses a particular language according to the interlocutor.

A – Certain – Place – a – Certain – Language Strategy. Very often parents choose to speak one language at home and another outside. In this case the context is not a person, like in the previous one, but a situational environment. Again, the vital thing is to keep the contexts of L1/ L2 usage separate.

A – Certain – Time – a – Certain – Language Strategy. The context is determined by a certain time period, e.g. a particular language is spoken on particular days. If speaking about a bilingual kindergartens which have been gaining popularity nowadays, children and care-takers converse in L1 in the morning and in L2 in the afternoon.

A Combined Method. The father's language is, for instance, used when the family are all together, but that of the mother in the absence of the former. Here we have separate context for each language, which does not depend either on a person or on a place or time. Such combination may be useful for a child to understand that both languages are means of communication, but not attributes of certain people or places.

These strategies may be used as guidelines for parents to form the child's awareness of existence of two separate languages which will in later stages contribute to establishing their metalanguage awareness. The foregoing approaches however should be treated as practical advice rather than a rigorous rule to obey, as there is no proved evidence that other methods are detrimental, causing, for instance, delayed language production [3, p. 86–87]. Within particular families, other strategies can turn out to be as good as the mentioned above.

Canadian French Immersion Programmes

Canada has a rich experience in bilingual education that aims at fluency and literacy of students both in English and French. It was started as an experiment initiated by parents of pre-school children, and conducted by Wallace Lambert in late 1960s in Quebec, namely at St. Lambert's primary school. It was the total French immersion programme for English speaking pre-school children aged 5 who, having begun school education, spoke only English. The teacher addressed them only in French, as well as all the complete studying was also in French (reading, writing, arithmetics, together with all other subjects). Certainly, the children addressed each other and the teacher in English, but she answered them in French; she encouraged their gradual progress in French without correcting errors or fostering them to speak L2 before they felt inner readiness for it. The process of studying lasted in such manner for three years (zero, 1st and 2nd forms of primary school). In the 3^d form, English was introduced for teaching about half of the subjects and for literacy development (acquisition of reading and writing skills in English). Later, the language of teaching particular subjects was changed yearly: e.g. if geography was taught in English in the 3^d form, in the next form French was used for its teaching [6, p. 196–198].

The children participating in the programme were observed during all their school life and even later. The level of their knowledge of non-language subjects was the same as that of their monolingual peers. As for the language tests, at primary school the bilingual children were worse both at L1 and L2. At the age of 11, the situation changed as the bilinguals caught up

with French monolinguals in French, and surpassed significantly monolinguals in English in the level of vocabulary, comprehension of various notions and concepts from different fields, linguistic creativity and imagination [ibid., p. 198].

Thus, the programme proved success, since it covered both L2 learning and the curriculum needs; provided children with functional competence in both written and spoken L2 at the same time maintaining high levels of the children's L1 development. Besides, the children acquired biculturalism in relation to French Canadians and formed positive attitudes towards them. Nonetheless, two crucial facts should be mentioned: (1) L2 was initially the language of lower prestige; (2) the status of children's L1 (home language) and culture were supported as valuable both by the school staff and by the family [ibid., p. 198].

After Lambert's experiment huge success, the approach to bilingual education changed considerably. Now French immersion is spread throughout Canada in different variations: there are early, middle, late immersion programmes regarding the age of children when L1 is introduced; total and partial; bilingual and even trilingual ones [ibid., p. 198–199].

The main advantage of the immersion programme is the output of children's high levels of L1 and L2 language and literacy skills combined with high levels

of academic achievements. As we can see, bilingualism did not dwarf children in their cognitive development; on the contrary, it brought about the benefit of knowing two languages.

CONCLUSIONS

The major concern of this paper has been with basic theoretical concepts regarding bilingualism. We also attempted to investigate links between theory and practice focusing on the ways how parents and school can help children become bilingual. All mentioned above foreign experience should certainly be adjusted to the local conditions. In our viewpoint, the development of state bilingual education programmes beginning with pre-school education up to post-graduate completion programmes is the urgent demand of contemporary times.

The promising directions for further investigation can be the study of developing bilingualism in early childhood in comparison with acquiring it at later age, analyzing advantages and disadvantages of both; the next step can be working out strategies for efficient target language teaching, taking into account different teaching techniques for learners of different age range. Evidence on effective bilingual practices can be gathered in schools that are known to be exemplars of good practice. Researching these practices would be highly informative and could be used for the development of pedagogical practices and implementation.

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