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La colección *Ettxeberri Bilduma (EHS)* atiende a la historia sociolingüística del euskera, publicando documentos históricos y trabajos de investigación, tanto estudios actuales como escritos dispersos precedentes. Tendrá en cuenta también investigaciones de otros países y lenguas.

La collection *Ettxeberri Bilduma (EHS)* traite de l'histoire sociolinguistique de la langue basque, en publiant des documents historiques et des travaux de recherche, aussi bien des études actuelles que des écrits dispersés déjà publiés. Elle tiendra compte des recherches des autres pays et des autres langues.

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10

ETXEBERRI  
BILDUMA  
(EHS)

TAXONOMY PROPOSAL FOR THE (HISTORICAL) SOCIOLOGY  
OF LANGUAGE RESEARCH: A BASQUE CONTRIBUTION

MIKEL ZALBIDE  
LIONEL JOLY



MIKEL ZALBIDE, LIONEL JOLY

## TAXONOMY PROPOSAL FOR THE (HISTORICAL) SOCIOLOGY OF LANGUAGE RESEARCH: A BASQUE CONTRIBUTION

The *Ettxeberri Bilduma (EHS)* collection presents a sociolinguistic perspective on the history of the Basque Language which is based on the review of varied and widely sourced material encompassing historical documents and more recent research papers and publications. It also takes note of relevant research from other countries and languages.



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Lionel Joly



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Mikel Zalbide, Lionel Joly



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REAL ACADEMIA DE LA LENGUA VASCA  
ACADÉMIE DE LA LANGUE BASQUE

BILBO  
2024

ETXEBERRI BILDUMA  
Director / Zuzendaria: Mikel Zalbide

Argitalpen honen fitxa katalogafikoa eskuragarri duzu Euskaltzaindiaren Azkue Bibliotekako katalogoan:  
[www.euskaltzaindia.eus/azkue](http://www.euskaltzaindia.eus/azkue).

La ficha catalográfica correspondiente a esta publicación está disponible en el catálogo de la biblioteca de la Real Academia de la Lengua Vasca:  
[www.euskaltzaindia.eus/azkue](http://www.euskaltzaindia.eus/azkue).

Les données bibliographiques correspondant à cette publication sont disponibles sur le site de la Bibliothèque Azkue de l'Académie de la langue basque:  
[www.euskaltzaindia.eus/azkue](http://www.euskaltzaindia.eus/azkue).

A catalog record for this publication is available from the Azkue Biblioteka, Royal Academy of the Basque Language:  
[www.euskaltzaindia.eus/azkue](http://www.euskaltzaindia.eus/azkue).

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[info@iberoamericanalibros.com](mailto:info@iberoamericanalibros.com)

[www.iberoamericana-vervuert.es](http://www.iberoamericana-vervuert.es)

ISBN 978-84-9192-453-1 (Iberoamericana)

ISBN 978-3-96869-619-5 (Vervuert)

ISBN 978-3-96869-620-1 (ebook)

ISBN 978-84-128382-0-6 (Euskaltzaindia)

Legal deposit / Depósito legal: M-18581-2024

Text review / Revisión del texto: Nikolas Gardner

This book is printed entirely on eco-friendly, chlorine-free paper / Este libro está impreso íntegramente en papel ecológico sin cloro

Printed in Spain / Impreso en España

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## FOREWORD

This book aims to offer a new perspective and a new methodology which provide a tool for all researchers in historical sociology of language, but also social history, cultural history, historical sociolinguistics and the fields of research that link language and society, in a diachronic perspective but also in a synchronic perspective. The original point of view from which this methodology arises is Basque studies, but it can almost completely be applied to any international linguistic context, with some little changes.

This work is the result of a long methodological reflection that has been developed in different publications. The most exhaustive was published in Basque (Zalbide, Joly, Gardner 2015), with a shorter version in English available on the Basque Academy website. The book you are reading is just a short presentation of the taxonomy and the methodology proposal that our team has created to help sociology of language and sociolinguistics researchers in their work. Most of the examples, tables and footnotes have been removed to shorten and simplify the text. All these examples and other materials are available on the Academy of the Basque language website.

The full taxonomy is presented in the appendix of this book.



# **1. THE SOCIAL HISTORY OF BASQUE: SHB IN THE INTERNATIONAL CONTEXT**

As we have seen in another work (Zalbide, Joly, Gardner 2015), there are many ways of doing historical sociolinguistics and some approaches are very different from others. Having different objectives, the theoretical and methodological bases used are also different, to a large extent, despite occasionally complementing each other in some specific cases. In this section, we are going to place our project, the SHB project (Social History of Basque), in that international epistemological context.

First, we must mention a fundamental point: SHB's perspective and its sociolinguistic taxonomy is not exclusionary: an attempt has been made to include all perspectives. Nevertheless, it must be said that at the same time our methodological proposal is noticeably closer to the sociology of language than to variationism. The object to be described is not change in the language's internal configuration but, rather, the nature, evolution and, if possible, reasons for the evolution of the sociolinguistic situation. By sociolinguistic situation, we mean the explanation of parameters which the sociology of language habitually examines: language use, language competence, opinions/attitudes, language planning, etc. As our proposal gives substantial space to defining the socio-historical context, it is also close to social history and, finally, as it offers a whole line of research into language, it also takes external language history and variationist sociolinguistics into account. Our team has used the contributions of various branches of historical and synchronic sociolinguistics to establish its own model, not only in respect of its goals, but also in terms of the methodology used and the taxonomy we created. Contributions from the sociology of language have often been used as, to a lesser extent, those of variationism. Occasional contributions from other branches have also been used, as will be seen in detail in the following chapters.

SHB's methodology has tried to make use of these scientific bases, but this methodology, taken as a whole, is completely new. We have considered the creation of a whole new methodology framework to be indispensable. As we have seen (Zalbide, Joly, Gardner 2015), there is no generally accepted methodology for research in historical sociolinguistics, except in historical variationism. Usually, each author adapts and uses theoretical-methodological bases appropriate for their own partial objective. SHB's objective goes beyond that,

as it aims to reflect and present the most complete methodology possible. For the moment, this book is a first step: we are well aware that any model, however sophisticated, must be completed and adapted over time.

The model which will be presented in the following chapters is not completely universal. We have taken our starting point from international experiences and research to create a general methodology, but the resultant construct is particularly adapted to Basque: researching the social history of Basque is our main objective. We are convinced, though, that this model is valid for researching many other historical contexts involving language contact situations, once the necessary adaptations have been carried out.

The project's objective being to clarify the social history of Basque, two main tasks were contemplated from the beginning. On the one hand, creating a database on the lines of the giant databases which have been becoming common internationally in recent years, to appropriately classify data that may be of use in clarifying the social history of Basque. Secondly, putting forward a *grille de lecture* to use and examine that data, in order to ensure a homogeneous perspective in the monographs to be published within its framework. The taxonomy was created to classify the sociolinguistic information taking into account the most usual variables that arise in the international bibliography linked to the sociology of language.

### 1.1. SHB: THE DATABASE

More and more giant databases are being set up and used in linguistics. The latest technological innovations have strengthened this tendency considerably. These databases have brought enormous advantages to the fields of linguistics and historical sociolinguistics: they guarantee reliability and offer new ways of carrying out research (Conde 2007: 47). These databases also provide the opportunity to work with all the texts available for a given period. Thanks to this, new research parameters can be taken into account (Conde 2007: 48). However, the contribution of these databases to historical sociolinguistics is limited because they do not make the external variables affecting language use and behaviour explicit in a wholly reliable way (Conde 2007: 51).

There is a substantial difference between the database SHB has set up in comparison with databases deriving from linguistics. In addition to collecting texts, SHB also collects and classifies pertinent sociolinguistic information in particular passages of text ("quotations" in our technoelect). The SHB database has been designed specifically and directly for the analysis of the social history of language. The aim, therefore, is to classify all the sociolinguistic information

about a particular period in the database using a taxonomy that includes the different parameters raised by the sociology of language. In order to establish categories, as we will see in the following chapters, we have tried to take into account the most important variables and parameters commonly used in the sociology of language and sociolinguistics. Thanks to this, the SHB database is a fairly structured collection of information in conceptual terms: on the one hand, the aim is to guarantee the reliability of the data due to its abundance; on the other, a *grille de lecture* is provided to facilitate sociolinguistic analysis and, to an extent, to permit the systematic analysis of correlations between external variables and sociolinguistic events. Thanks to this, and to the quotations collected, the SHB database will be of use in several fields, primarily in the sociolinguistic history of languages, but also for historians, linguists, geographers, for people working in the sociology of language and, in particular, in language planning, sociologists, anthropologists, social psychologists, textbook writers and so on.

## 1.2. SHB: TAXONOMY PROPOSAL FOR THE SOCIAL HISTORY OF BASQUE AND MINORITY LANGUAGES

The aim is to collect and organize information in the SHB database on the sociolinguistic situation of Basque in particular epochs, periods or moments. SHB has developed a methodological model for organizing information, a *grille de lecture*, which constitutes a taxonomy for historical sociolinguistics, especially from the point of view of the sociology of language. No such tool was previously available. During the first meetings of researchers on how to write a social history of the languages of France (*Histoire Sociale des Langues de France*), for instance, this same shortcoming was encountered. There was a need for a template to define the book: temporal and spatial limits had to be designated, topics of research delineated (treatment of other languages in the area where the language is spoken, emigration and immigration, ... – see Kremnitz 2004) and a methodological framework developed. But there were no frameworks available worldwide for the sociolinguistic history of languages. In the proceedings of the conference held by the authors in Paris to prepare the publication, one can detect two types of concern: the authors point to the need to determine the object of the research with precision, and they stressed that, even if that were done, the research methodology was lacking.

To create that methodology, we have examined methodological findings since the foundation of sociolinguistics and the tools it has developed, as well as its main theoretical concepts and, bearing our task in mind, we have tried to put together a wide-ranging, flexible and detailed methodology. SHB's ob-

jective has been to put forward a methodological framework for the Basque case. As we will see later on, the construct is flexible and, at the same time, precise. It is flexible enough to apply to other languages after making some adjustments. It is also precise in the sense that it fully reflects the methodological contributions of the sociology of language to facilitate a systematic description of the social history of languages.

So we did not start from scratch when creating this taxonomy. Even though sociology of language is a fairly new discipline, a number of its main authors have defined solid theoretical bases and concepts that we have tried to put together in our model, which led us to the consecution of a global and international sociolinguistic taxonomy. In addition, there has also been in-depth work in the historical sociolinguistics field. It would have been a serious mistake to have gone ahead as if there were no precedents. They have learnt that lesson thoroughly in the natural sciences: when an unknown species is found, a new classification is not created; firstly, already existing categories are used and, if the species does not fit the model, the latter is modified and improved. So SHB's model is a taxonomic proposal for the social history of languages (in this case, that of Basque): a structured listing of all the most important sociolinguistic concepts that leads to a taxonomy in which new findings of information in sociolinguistic theory can be accumulated scientifically. Starting from the extensive heritage of concepts and terms, we have tried to draw up an appropriate methodological framework for our task.

We have created a model for Basque in Basque. We will have to continue to keep in touch with other researchers in the field of historical sociolinguistics; however, to exchange ideas and improve the model itself, this book in English is another step down this path. Several international experts (B. Jernudd, B. Spolsky and C. H. Williams) took part in the first seminar organized by SHB and, before the release of this book, international experts gave their commentary on the reading, such as J. Darquennes and W. Vandebussche.

In fact, communication between experts in the field sometimes needs to be improved; as Willemys and Vandebussche (2006: 158) have already mentioned, communication between researchers has been promoted less than it should be in our field: "As such, even as of today, European historical sociolinguistics still overwhelmingly tends to concentrate on one language at a time. Certain scholars, however, have repeatedly claimed that 'true' historical sociolinguistics needs intense international and cross-linguistic collaboration." Further on, Willemys and Vandebussche state (2006: 159): "Also, although there is an extensive and very successful historical-sociolinguistic tradition in German linguistics, its findings are hardly ever mentioned in English language

sociolinguistics, mainly because there [sic] are always published exclusively in German. One practical example: between 1987 and 2004 there have been seven conferences on ‘Historische Soziolinguistik des Deutschen’ (Historical Sociolinguistics of German) in Rostock”.



## 2. SOCIO-HISTORICAL SETTING

This book is organized according to the entries (in other words, the labels) in the sociolinguistic taxonomy and in the database we have created. We manage the database information by applying the labels we have created, and the first question in dealing with the sources of information and different quotes of interest to the historical sociology of language is to determine the socio-historical setting of the information. This is a basic requirement with regard to defining a taxonomy useful for the social history of languages. SHB makes use of sociolinguistic information from different periods of time in its database. For SHB to be scientifically robust, this data must be as trustworthy as possible. For the material in the database to be properly organized, information in a specific quotation that is of interest to SHB has to be marked up in many different ways, including:

- 1) bibliographical information about its source;
- 2) the socio-historical setting of the quotation;
- 3) its sociolinguistic features, according to the historical sociolinguistics taxonomy we have created;
- 4) the degree of reliability of the quotation.

We will discuss only the last three of these points in this publication as we believe that the system that SHB (Zalbide, Joly, Gardner 2015: 173-181) has developed to provide bibliographical information about sources does not offer any added value for international research.

In this chapter, we will explain how we present and mark up socio-historical settings: how we mark up geographical, historical, social settings and so on. Defining the socio-historical context is fundamental when researching historical sociolinguistics. SHB groups the labels used for those functions under the superordinate term *location*.

When did it happen? and where did it happen? are the most common initial questions to define the socio-historical context. We discuss the question *What happened?* – what sociolinguistic occurrence, linked to Fishman’s “who speaks what language to whom and when and to what end” (1972a: 3), but as we will see, our question goes beyond Fishman’s definition – when describing

the sociolinguistic taxonomy in the next chapter and, in greater detail, in subsequent chapters. However, the geographical or historical setting of a social or language event is not something purely objective: the systems which we use to describe place and time are social, socially created in particular social matrices. To the extent to which we accept that society itself has created the systems we use for defining place and time, it is more appropriate for us to talk of social time and social space. For further information about this concept in the sociolinguistics field, see Bock (1968: 215-217); Zentner has carried out a similar analysis in the social sciences (Zentner 1966), examining physical time, physical space, social time and social space; Guy (2009), too, has analysed anthropology and physics, concerning the social nature of space-time. Clearly, in addition to physical space and time, social space and time must also be taken into account.

Bearing the above in mind, a wide-ranging series of questions about time and space opens up before us. In the first case, as well as establishing historical coordinates of specific events according to a given calendar, historians usually divide history itself up into periods. In the second case, we have to decide which system we are going to use to name physical space: ‘natural’ space as determined by geographical features, one of the spatial systems created by organizations (the church, civil authorities etc.) or some other type of operational classification. Taking the social nature of coordinates into account, there is no need to limit questions of location to socially accepted systems. Neither is there any need to limit them to descriptions of physical and social space and time. Here, for instance, are some other questions we could ask: what is the strength of the societal phenomenon which we are registering? How widespread is it throughout society? How many people does it affect? Where can we place it socially (by age, gender, social stratification etc.)? If it occurred in a traditional society more rigidly structured than today’s, where exactly? Where is it in socio-functional terms? So many questions can be asked about the location of any sociolinguistic event. All these questions have been structured in five main groups in our taxonomy as can be seen in table 1. Of these, the first label in the list, *When*, corresponds to social time; all the others, in contrast, are connected with social place or space.

Table 1: Socio-historical location parameters

<i>Location: first-level labels</i>	Notes on content
When	Locational data defined by time. Locations can be known dates or a period. Basically, this parameter responds to the question: ‘Which period is discussed in the quotation?’, ‘Which period does the quotation give us sociolinguistic information about?’
Type and quantity of speakers	Group of terms concerned with social attributes and the number of people affected by them. On the one hand, data formulated in terms of the most common sociological variables (age, gender, social stratification etc.) are included here; on the other, data that reflect the reach of the phenomenon (how many people, what proportion of the population etc.)
Geographical position	Data depending on physical and spatial location, according to different social positioning systems.
Ecological demarcation	Types of work cyclically connected with the seasons of particular natural surroundings (mostly ways of production and the associated ways of life). Mostly used for traditional ways of life: classification by people’s type of mobility.
Socio-functional position	The socio-cultural context connected with the event. In general (but not always), socio-functional distribution according to the main societal domains.

These five parameters, of course, are not the only possible ones: other classification systems have been formulated in the past. Sociolinguistics focused on the synchronic perspective, for instance, has often put forward a more interactive approach, paying particular attention to face-to-face encounters. Hymes (1968: 110), for instance, following Jakobson’s lead, defined seven parameters to describe speech events: “Every speech event involves 1. a Sender (Addresser); 2. a Receiver (Addressee); 3. a Message Form; 4. a Channel; 5. a Code; 6. a Topic; 7. Setting (Scene, Situation)”. The SHB model also tries to include this information as far as possible in other parts of the taxonomy.

In the following sections, SHB’s five main socio-historical parameters of location are discussed.

## 2.1. WHEN

On the historical location of quotations, in our model, some variables are taken into account for each document or individual quotation from it. The fields of our methodological proposal *when published*, *when published for the first time* and *when created* are linked to each document. In connection with quotations

and, more precisely, with the event described by the quotation, we have created the label *period discussed*. There are two more precise terms under this: *period discussed: date of commencement* and *period discussed: date of termination*. It is worth analysing in greater detail the treatment of time because of the importance that time and the chronological aspects of language behaviour and related events have in the entire project.

Although there is a fairly unified date system for naming time in Western culture, the way to give form to social time was an important point of debate when establishing our methodological framework. How to treat time has been a source of discussion among historians, as is well known, although we will not examine those theoretical-methodological debates at length here. For further information, see Riot-Sarcey (2002), Rostenne (1994a, 1994b), Noiriél (2002), Covo (ed., 1994), Guy (2009) and our original books (Zalbide, Joly, Gardner 2015).

When we ask when a given piece of data occurring in a quotation happened, that question can be interpreted in more than one way (as the vast majority come from written documents). That is why SHB has established four distinct times as shown in table 2:

Table 2: **Different types of *time***

Code	Concept	Which question is being answered?
<i>When</i> <sub>1</sub>	Year of publication	When was the document which we are considering, which we have in our hands, published on paper or (in the case of a digital copy) on the internet?
<i>When</i> <sub>2</sub>	Date of first publication	When was the document we are considering published for the first time?
<i>When</i> <sub>3</sub>	When written	When was the document we are considering written?
<i>When</i> <sub>4</sub>	Period discussed	Which period does the quotation from the document tell us about?

As no great explanations are needed to understand the first three cases (Zalbide, Joly, Gardner 2015: 177-180), let us examine how SHB has chosen to mark and define the historical period of the sociolinguistic information provided by the quotations (*When*<sub>4</sub>).

### 2.1.1. Characteristics of the documents which have to be dated

SHB examines a wide-ranging collection of documents, most of which are hand-written or printed texts. Table 3 shows how each document is treated.

Table 3: Treatment of *when*<sub>4</sub>, by document type

Source of quotation to be dated	Examples	Question used to assign <i>When</i> <sub>4</sub>
Published text	Books (or chapters of books), magazines, articles, newspapers, Internet publications, printed documents in general (verse-sheets...).	Which period does the quotation tell us about?
Unpublished text	Collections of letters, archives, inscriptions and other manuscripts if not available in a book, other printed form or as an internet document. In general, all unpublished sources fit into this group.	Which period does the quotation tell us about?
One writer mentions another	Texts containing this sort of embedded quotations or data can be published or unpublished.	Which period is discussed in the <i>surface</i> and <i>deep parts</i> of the piece of text? (The words of the first author make up the <i>surface part</i> of the quotation while the information provided by the latter constitutes the <i>deep part</i> .)
Objects which are not written texts	Maps, images, recordings, photographs and so on.	Which period does the object tell us about?

### 2.1.2. Measurement patterns chosen by SHB

To define when a sociolinguistic event happened, then, dates and date intervals must be specified. Table 4 shows the formulas used by SHB:

Table 4: Date formats

Formula choice	Meaning	Example
[year]	In which year did the event occur?	1842
[year <sub>1</sub> ] – [year <sub>2</sub> ]	From which year to which year	1842-1844, 1842-4
≥ [year <sub>1</sub> ]	At the earliest in that year	≥ 1842

$\leq$ [year <sub>2</sub> ]	At the latest in that year	$\leq$ 1842
$\approx$ [year]	Approximately in that year	$\approx$ 1842
$\approx$ [year <sub>1</sub> ] – [year <sub>2</sub> ]	Approximately in those years	$\approx$ 1842-1844
[year <sub>1</sub> ]-HH-EE	The day, month and year of the writing or publication of a newspaper, letter or archive document.	1842-11-17
Unspecified	We are not sure, but we use one period or another as a first approach	?1842-?1844 ?(1842-1844)
Long ago	Far back in the past, without being exactly specified	Long ago
year [year]	<i>Year of surface part [Year of deep part]</i>	1844 [1742]

## 2.2. TYPE AND QUANTITY OF SPEAKERS

This second group of terms of location from our methodological model includes two quite different areas: some basic sociological variables (*social attributes*) are taken into account while the number of participants in the interaction is also reflected in one way or another (*proportion and number of speakers*). Both will be discussed in the following paragraphs.

### 2.2.1. Social attributes

Variables that are fairly common and useful in sociology, linked to the attributes of the speakers taking part in a speech act, have been included in this section: *age*, *gender* and *social stratification*, plus – as usual – a catch-all category named *other*. Let us examine them one by one.

We include three main variables here, the most significant in the Basque socio-historical context, whereas some other authors specify more. Our choice is thus no more than one of several options. The list could be lengthened considerably. Afendras (1969: 4), for instance, includes the following: “social class, age, sex, occupation, religion, political affiliation, education and place of origin”. Some further variables which could also be added to Afendras’ list have been used in SHB’s methodology in the *ecological demarcation* section. Labov (2001: 145-322), for his part, mentions social class, gender, neighbourhood and ethnicity, with age as a transversal.

The importance of age in changes in the social organization of speech behaviour everywhere is obvious (Eckert 1997; Barbieri 2008). In synchronic analysis,

for instance, the language behaviour of the young and the old of a particular period (in language use, acquisition, linguistic forms used, opinions, attitudes and behaviour) can be quite different (*Kultura Saila* 2003, 2009; *Kultura Saila et al.* 1995, 1997, 2013; *Bat soziolinguistika aldizkaria* 1991, 3/4; 2002, 43; 2007, 64; 2012, 84). In the same way, from a diachronic perspective, types of comparison themselves can involve age (see below, for example, the explanation of cell 2A). We have created a label to reflect the influence which age has in all of these areas. That label, however, does not enable us to state exact ages. It only enables us to state that the variable of age features in the quotation. We have chosen a halfway compromise because, as elsewhere in our model, offering more detailed options would lead to too many complications. So if, when a quotation is stored, the age label is marked, it means that the quotation includes mention of generational differences. Readers may think that adding categories such as “child, young person, adult, old person” would not create many difficulties. That is partly true, but not wholly. The number of segments in the methodology of SHB which already have to be marked is quite large. A detailed grading of all the parameters would make the model unusable. In addition to this, in real texts information to be classed according to such a gradation is seldom to be found. An author may mention the age variable, but only superficially: in other words, without specifying a single one of the four categories. One problem which we have often had is linked to historical relativism: age bands and reference groups have changed over time. Today, we can talk about a 28-year-old young person; in the Middle Ages, however, it would have been very difficult to regard a 28-year-old as young. For instance, if a quotation says that “old people in the town speak in Basque, but young people talk in Spanish”, the age label must be marked. Information about single-age groups must also be collected, of course: for instance, in a sentence such as “young people in the town speak in Basque”. These two cases are generalisations. In individual cases, too, when information about age is collected, the age label has to be marked in some instances. For instance, “the young person at the door told us in Basque to go in”. In such quotations, the age label must be marked. For each label presented in this book, many examples are available online on the Academy website.

The influence of *gender* in language matters is a well-known variable (Meyerhoff & Schleeff 2010: 461-531). First of all, a precision: normally in research one refers to sociological gender and not the biological sex variable. As Labov (2001: 263) has written, “Everyone agrees that gender is a social factor – language is not differentiated by the biological aspects of sex differences”. For the debate see, for instance: Eckert & McConnell-Ginet (1999), Labov (1991), Trudgill (1972). For historical sociolinguistics, also see Conde Silvestre (2007, in particular, 113-129 and 156-164), Santos Dominguez (1986: 286-287), Nevalainen & Raumo-

lin-Brunberg (2003: 110-132), Fernandez (2011), Gowing (1993), Endo (2006) and, from the social history school, Scott (1987). In the Basque Country see, for instance, Hernández (2002). For instance, in the data collected in Bilbao in 1920, there is a noticeable difference between the genders (Aizpuru & Zarraga 2011: 131). That sort of difference has sometimes been related to educational level. However, this is not always the case: in Bilbao, while there was a difference in literacy rates between men (92.5%) and women (84%), the difference in educational level between the two genders was relatively small (Aizpuru & Zarraga 2011: 132). For earlier periods, see also Madariaga 2014. Some of the examples to be found there are very similar to those which Gowing (1993) mentions for England.

Labov (2001: 261-293), for instance, has underlined the importance which the gender variable has (or may have) in language change, developing what he called the “gender paradox”. When examining language change, Labov specifies a number of principles with regard to the gender variable:

- “For stable sociolinguistic variables, women show a lower rate of stigmatized variants and a higher rate of prestige variants than men.” (Labov 2001: 266);
- “In linguistic change from above, women adopt prestige forms at a higher rate than men” (Labov 2001: 274);
- “In linguistic change from below, women use higher frequencies of innovative forms than men do” (Labov 2001: 292).

Labov derives the gender paradox from those principles: “Women conform more closely than men to sociolinguistic norms that are overtly prescribed, but conform less than men when they are not” (Labov 2001: 293).

Other gender-related issues can also arise: if there is any difference, who has a greater influence on intergenerational language transmission: the mother or the father? Who is more faithful to their parents’ way of speaking? Who is the first to learn a foreign or neighbouring language? Are there distinguishing features in terms of use? Has Basque ‘*hitanoa*’ (in addition to standard T verb forms, Basque can optionally include an allocutive T marker in other verb forms to indicate the gender of the person addressed even though that person does not participate in the verbal action as subject or direct or indirect object) been kept up more by men in recent decades, or do men and women use it in similar proportions? With regard to languages and their speakers, are opinions, attitudes and behaviour evenly spread by gender, or is there a noticeable difference? When we ask this question, we are not suggesting that behaviour by gender is always different. But for cases where there is a difference, we need a label for it and a sociolinguistic taxonomy

should include such a variable. As with *age*, and for similar reasons, the *gender* mark does not allow further specification such as male or female; similarly, here too, individual cases, as well as generalisations, have to be taken into account.

In addition to age and gender, social stratification is also an indispensable variable in a sociolinguistic taxonomy as it is one of the most important variables (Nevala & Sairio 2017, Meyerhoff & Schlee 2010: 389-459). In historical sociolinguistics gender and social stratification are usually linked and can make a major contribution towards understanding the sociolinguistic situation. During the Middle Ages in England, for instance, literacy was inextricably linked to the social position which was linked to gender “since women’s subordination by patriarchal hierarchy meant a serious barrier to their access to education and literacy” (Hernández 2016: 112). The term *social stratification* was very deliberately chosen over the probably more widely-known and popularly used ‘social class’. There are at least two arguments in favour of this choice: for one thing, there are objective difficulties in defining social classes (Mallinson 2007); for another, SHB has to be able to account for all the stratification systems mentioned in the sources, and the term social stratification has a wider meaning than social class (Mallinson 2011, Labov 1966). In consequence, we chose an overarching term that can reflect all options. Sources sometimes differentiate language matters by the social class of participants without going into detail (“upper class”, “lower class”, “people of means” etc.). In other cases, these references are more precise, differentiating by income, job, other socio-professional categories or by the level of formal education. For example, who was bilingual (in terms of face-to-face, spontaneous, everyday activity) in villages and hamlets that were largely monolingual Basque? Can they be differentiated using one of those categories? Where such distinctions have been made, this is the term normally used to classify this information in SHB’s methodological model. This variable is always important: because of that, social stratification (in many cases, social class) has been more or less the most exploited variable in sociolinguistics (Labov 1991 [1966]; Milroy & Milroy 1992; Bernstein & Henderson, 1972. In the case of historical sociolinguistics, see Nevalainen & Raumolin-Brunberg 2003: 133-156). Nevertheless, as in the previous two cases, the specific details of *social stratification* cannot be indicated in the model we have developed. Despite the differences, social stratification has often been closely linked to speakers’ professions. Stratification based on the profession has been highly variable, however, over time, which is why we cannot draw up an unambiguous table that would be valid for all periods.

The last option in this section is *other*. Although social stratification, gender and age are the most frequent and most important sociolinguistic variables, others should also be taken into account. Unfortunately, most quotations do not give straightforward information about these variables and such information has

to be inferred. These variables include: social network (Milroy & Milroy 1992, 2010, Milroy 2001), ethnic identity (Fishman (ed) 1978, Giles *et al.* 1977), religious identity (Santos Domínguez 1986, Conde 2007: 343-344, Samarin 1987, Spolsky & Cooper 1991, Fishman 1965b, Weinreich 1953), the geographical variable, profession (Labov 2009: 103-105, Holmqvist & Andersen 2001) etc. On social networks see, in the case of historical sociolinguistics: Fitzmaurice (2000); Tieken-Boon van Ostade (2000a); Bergs (2005); Nevalainen (2006: 567-570). SHB takes several concepts linked with social networks into account in the *ecological demarcation* set of labels (the diaspora, for instance). For its part, the geographical variable has its own entry in the taxonomy of SHB: see *location/geographical position* (2.3).

In this book, we are attempting two things. On the one hand, to present a taxonomy useful for sociolinguistics which includes all the different parameters raised by sociolinguistic studies; this taxonomy should be as exhaustive as possible. On the other, we present the model used by our project, which has to be useful and adequate for the materials we can obtain and the sources that are available; this practical model is not as exhaustive as the global sociolinguistic taxonomy. For example, in the case of age, an exhaustive taxonomy should take into account different age groups; for gender, different genders would be specified; in the case of social class, different classes should be present, and the different variables mentioned in the last paragraph (social network, ethnic identity, religious identity and so on) should also be listed. For practical reasons, some of which are mentioned in this book, we cannot mark the quotations of our project so exhaustively, but we try to mention all the variables that should be included in an exhaustive sociolinguistic taxonomy of international scope. In short, our model is a summary of a more global sociolinguistic taxonomy where most of the parameters are included and presented in this book, even if they are not included in the model SHB is working with. Maybe this is the biggest difference between a taxonomy for synchronic sociolinguistics and a taxonomy for diachronic sociolinguistics: details in the parameters and subfields are much easier to determine and use in synchronic research than in diachronic research. This is true for most of the concepts presented in this book, and the taxonomy presented at the end of the book is what is used in our project; a more exhaustive one can easily be created using this book: for instance, in the table above we can see the difference between our model and a possible synchronic model, more exhaustive, in the case of the *social attributes* parameter.

**Table 5: Example of the difference between an exhaustive sociolinguistic taxonomy and the model used by SHB**

Labels used in SHB			Labels that can be added to a more exhaustive sociolinguistic taxonomy
First level label	Second level label	Third level label	Fourth level label
Type and quantity of speakers	Social attributes	Age	Children
			Young people
			Adults
			Old people
		Gender	Female
			Male
			Intersex/Other
		Social stratification	Upper class
			Middle class
			Lower class
		Other	Social network
			Ethnic identity
			Religious identity
			Profession
			Other

### 2.2.2. Proportion and number of speakers

The second branch of the type and quantity of speakers group of terms is connected with quantity. According to Fishman (1968), five cases can be distinguished in connection with the number of speakers. Sources mentioning the social organization of language behaviour, or behaviour related to languages

or speakers of those languages, fit into one of the following five categories: a) a single speaker (or writer); b) two speakers communicating with each other (by speech or in writing), in so-called dyadic encounters; c) a limited group of speakers from specific places (or groups of writers/readers); d) broad groups of speakers (or readers/writers); e) the whole speech-community. In this sense, the following explanation by Fishman (1968: 5) may be useful: “Under “society” one may be concerned with dyadic encounters, small group interaction, large group functioning, the articulation of social class and sectors, contacts and contrasts between entire nations, etc. Each of these social groupings may be examined concerning heterogeneity of composition, permeability of group barriers, status-role patterns, contexts of interaction, norm restrictiveness and stability, etc.”. SHB has decided to use a simpler set of categories, for convenience among other motives. Three main facets have been defined in what follows.

- What is the information given about a speech community’s *absolute number* of members (Fishman 1991: 45-55)? How many speakers of a particular language are there, in a given place and at a given time? How many of them can write; how many know how to speak or write? This concept includes in summary form Fishman’s five categories cited above. Other scales can also be taken into account. As with the whole previous set of terms, in this case, too, greater precision is not allowed. However, this term suffices to indicate that the number of people involved appears in the quotation; exact numbers can be taken, in fact, from the quotations themselves.
- What is the *Basque/non Basque-speaker proportion* in a given speech community? In the universe under consideration, what percentage or part use one language, what use the other, and what use both? What percentage knows one language and what knows the other?
- In ordinary, daily life (at home, in the neighbourhood, with friends, in one’s habitual relationship networks), to what degree are speakers demographically concentrated (*Basque demographic concentration*)? To put it another way, in the geographical area under examination (in a region, a village, etc.), do the Basque speakers live scattered about, or in separate groups, in their families, hamlets, villages or throughout the whole district? To what extent are the speakers of the minority language concentrated together, to what extent do they make up a compact speech community protected by a robust relationship network? This information is important (Fishman 1991: 58, 67; Giles *et al.* 1977; Sánchez Carrión 1991: 397: ‘compacting of the speech community’).

### 2.2.3. Summary of terms

Table 6 provides a summary of the terms presented in this section:

**Table 6: Structure of the term *type and quantity of speakers***

First level label	Second level label	Third level label
Type and quantity of speakers	Social attributes	Age
		Gender
		Social stratification
		Other
	Proportion and number of speakers	Absolute number of speakers
		Basque / non Basque-speaker proportion
		Basque demographic concentration
		Other

## 2.3. GEOGRAPHICAL POSITION

The determination of the geographical position where a speech event took place is a major issue in any sociolinguistic research and is an important field in our sociolinguistic taxonomy. When it comes to specifying place, as usual, the further back you go in time, the harder it is to determine where the event mentioned in the quotation took place, its specific “place of happening”, with the present-day level of precision. To deal with this, we offer two geographical positioning systems here (or, in the second case, a range of systems): one is *geo-linguistic position*, and the other is *administrative demarcation*. The first is more appropriate when data are not so exact and, above all, for the periods in which Basque speaking and non-Basque speaking areas could be clearly differentiated. To geographically position societal features of the present day and, in general, of recent centuries, the second set provides the opportunity to place events with great accuracy. If there is sufficient information, marking both of them is best.

### 2.3.1. Geo-linguistic position

One of the clearest examples of this particular positioning system, in the Basque case, is language maps: in other words, maps from different periods which show the boundaries between Basque and other languages (more precisely, the areas in which Basque is spoken). These maps split the Basque Country and the surrounding areas into two types of areas: *Basque speaking areas* and *non-Basque-speaking areas*. At one time, the boundaries between the two were very precisely staked out in many regions. Over the last 250 years, however, they have become blurred. Be that as it may, despite the difficulties, these are the two main terms in this system.

### 2.3.2. Administrative demarcation

This second set of systems is more complex, but it is also the most appropriate one to use in more modern circumstances. While at one time it was possible to draw clear borderlines between languages (in other words, a language – quite often, only that language – was dominant in everyday life), this is no longer the case. Administrative classifications – amongst other things because they provide many other types of information – have advantages which cannot be ignored, alongside certain disadvantages. As well as providing the chance to specify broad districts, these modern hierarchical criteria for territorial division make it possible to establish much more precise distinctions.

Within this group of administrative demarcations, three sets of options are provided, in our opinion the most relevant to the Basque case. These three options are different in terms of data-strength, usefulness and degree of precision. They have to be given names and these are the ones we have chosen: *civil demarcation*, *religious demarcation* and *other* to encompass other possible systems. By far the most important of them, from a long-term perspective, is *civil demarcation*. *Religious demarcation*, too, has been important, particularly up until the 20th century. In many areas, the diocesan system has been extremely important over the centuries, for example, in its influence on surnames (and the wealth of sociolinguistic conclusions which can be drawn from them). In the last option, *other*, three cases are differentiated: the first, *Judicial demarcation*, in general, is more specialised and, nowadays, is of less use. In the second, *other demarcation*, we consider different societal institutions that have organized territories in different ways, of course, but, at first glance, they do not seem so important for positioning sociolinguistic events: they include, for instance, the territorial organization in wartime, that of private companies or the organizational models different public bodies create to fulfil their various purposes (river basins for water management, territorial divisions for land management, policing, health services and education

etc.). The last option, *unlocated statement*, is included for general statements or for cases in which no place is specified.

### 2.3.2.1. *Civil demarcation*

SHB uses an adapted model of today's administrative-territorial structure to give sociolinguistic events their correct geographical positions when marking quotations. We have taken the social nature of place naming and the project's historical side into account when drawing up this adapted list. It is important to point out the difficulties which arise from a socially created system where both names and the territories they refer to change with surprising frequency in history: the geographic borders of a given town are used to change over time, sometimes a way of naming disappears and so on. We are not going to offer any more details about it here: we have already explained the possibilities that this system offers and its inevitable limitations in another publication (Zalbide, Joly, Gardner 2015: 193-203).

### 2.3.2.2. *Religious demarcation*

As with many other societal institutions, the church has developed its own territorial organization; as a result, many levels of religious authority (parish, diocese, deanery etc.) have held power in Basque speaking areas. The system developed by the church, in general, has problems similar to those faced by modern administrations: this long-lasting institution has changed the boundaries of its territorial units time and again; the very names have also been changed on occasion. So although there have only been three or four dioceses at the same time, there have been 18 different bishoprics altogether, each with its territory and some type of authority in the seven Basque provinces (Goñi 2004). In addition to this, many of those bishoprics have also held authority over areas outside those seven provinces. Furthermore, in addition to the church's main territorial organization system, religious orders and congregations have also had their provinces, convent districts and so on. These, too, have changed in varying measures over time (Jimeno Aranguren 2006).

Because of the importance the church has had in the Basque world, its boundary systems must be taken into account. When it comes to understanding local history and sociolinguistic evolution, religion has been an important variable throughout Europe, not just in the Basque Country. As Aracil (1983: 35) clearly states, for a long time the church was the only strong, long-lasting institution with a mandate over a broad area. So it was a major force conditioning sociolinguistic reality at the time: "The initial scheme was very clear. National vernaculars were used in ordinary life at a more or less local level. And, for centuries, Latin has

fulfilled a vital integrative function at the level of supra-local communication— at a time, that is, when the church was the only robust and efficient supra-local institution”. Nor should it be forgotten that for many centuries the church had a role in delivering justice and administration in addition to its present-day religious function. In this respect, we come across a problem central to this entire sociolinguistic taxonomy: to what extent must we specify and develop this classification, to what extent summarise it? When positioning events – and to the extent to which we have taken the current administrative structure to be the main system – it is clear that we have to give ecclesiastical administration a lesser role. Within that institution, however, the organization of the dioceses has been particularly influential. Because of that, we have deliberately included the names given to the eighteen dioceses which have existed in the seven Basque provinces at different periods. In addition, we have also added the term *district of religious order*, to be able to mark up quotations reflecting the positioning systems of religious orders appropriately.

### 2.3.2.3. *Other*

This last term (*other*) is a superordinate term for three further terms. As usual, it has been added to be able to include other minor systems. In this case, it includes *judicial demarcation*, *other demarcation* and *unlocated statement*.

Judicial demarcation positioning system: this system, too, is of civil origin.

The term *other demarcation*, as elsewhere in this Thesaurus, has been added in a catch-all fashion to include options not explicitly mentioned elsewhere. It serves in particular to reflect the positioning systems of other societal institutions.

Finally, the *unlocated statement* label has a special function: marking quotations that cannot easily be linked to a specific place. As with the term *undated statement*, this term is particularly useful in dimension E when examining the opinions of individuals or whole groups. In itself, it does not provide significant information: however, as a place must always be marked, this option has been added to help with mark-up work. It must be taken into account that an *unlocated statement* is made in a specific place or by a specific person (that person being from a specific place). If a quotation goes undated, where its content was expressed and by whom should also be marked, if the information is available.

## 2.4. ECOLOGICAL DEMARCATION

What we have called the *ecological demarcation* can be taken as an intermediate term-set: these terms have a geographical side to them, but their contents are by no means exclusively geographical; nor are they connected with established plac-

es: they refer, above all, to traditional lifestyles, habitual ways of life. So they are principally concepts to be applied to traditional society, although there are some surviving modern equivalents. They do not fit into *geographical position*, nor into *socio-functional position*. The concepts under this heading are divided into four main groups. As we will see, these variables are also common in international sociolinguistic research and this is why we include them in our taxonomy proposal.

The first two terms (*sedentary lifestyle* and *mobile lifestyle*) constitute a subset in their own right. The speakers who take part in the events we are trying to classify can have one of two types of lifestyle: living lifelong in the same place with no major breaks; they can spend a large part of their lives away from their place of origin without returning as in the case of diaspora; or moving away from (and returning to) their usual place of residence for various reasons and in a fairly cyclical manner. In short, the differentiating criteria between the two are: a) how long they spend away from their place of origin: hardly any time, longer or shorter periods (during each yearly cycle) or (almost) forever; b) whether that move away is cyclical or random.

#### 2.4.1. Sedentary lifestyle

Two main sets of situations that are relevant for HSL (Historical Sociology of Language) can be linked to a sedentary lifestyle. On the one hand, a sedentary lifestyle can be without noticeable migration movement – it is probably the most common; on the other hand, it can be linked with a migratory movement. In this last case, immigration movements and emigration/diaspora movements are long term migrations. We included the following concepts in our taxonomy to take these differences into account:

##### 2.4.1.1. *Sedentary lifestyle without noticeable migratory movement*

In the traditional way of life, most people did not move far from their place of origin. They might at most move from their birthplace to the nearest central place or to one of the surrounding villages, primarily for work, getting married or attending festivities. Until fifty years ago in the Basque country (perhaps, in the case of men, with the sole exception of military service since it came into existence), it was not at all unusual to find people who had never gone 30, 50 or 100 km from their place of birth in their entire life: they had what we are calling a *sedentary lifestyle without noticeable migratory movement*. The use of this concept means that the people involved in the linguistic interaction that we are analysing are sedentary and are not linked to any migratory movement; it does not mean that in the society they are living in there is no migratory movement.

### 2.4.1.2. *Sedentary lifestyle with migratory movement*

In some cases, which are usually of particular interest for SHL, a sedentary lifestyle can be linked to or can be the result of a migratory movement. Two migration types are to be taken into account: emigration/diaspora and immigration. As in many other geographical contexts, diaspora is of particular interest: the term is used to refer to people (and their descendants) who, although being part of a society by birth or upbringing, spend most of their life, at least their adult life, away from that homeland. This is the case of many Basques who went to North or South America, or, additionally in the northern Basque Country, of those who moved to Paris, Bordeaux or Pau in search of work. Research on diasporas is a much-loved topic in sociolinguistics internationally (Haugen 1953, Fishman *et al.* 1976 and Fishman (ed) 1978). In both cases, emigration/diaspora and immigration, there can be a retention of the language of origin or a more or less substantial ethnolinguistic assimilation and transethnization into the new sociocultural environment. The different possible cases are summarized in table 7.

**Table 7: Migration types and their consequence in the ethnolinguistic realm**

Migration type	Consequence in the ethnolinguistic realm
Emigration / Diaspora	A) Basque retention without learning/using the host language
	B) Basque retention plus learning/using the host language
	C) Full ethnolinguistic assimilation, full debasquisition
Immigration	A) Language retention without learning/using Basque
	B) Language retention plus Basque learning/using
	C) Full ethnolinguistic assimilation, full Basquisition

It should be noted that migrations have occurred through the Basque Country between Basque-speaking areas to non-Basque-speaking areas or in the other direction, from non-Basque-speaking areas to Basque-speaking areas. In the case of immigration, in Basque history, many times during at least the last two hundred years, the immigrant has arrived in a bilingual area where Basque and Spanish or French are present, and s/he is usually a speaker of one of the two languages spoken there (Spanish in the south of the Basque country and French in the north). In

the case of emigration of Basque speakers, full maintenance of language without any kind of learning/using of the language of the new area is impossible in the long term if there is contact with people of the new area, but it is completely possible in the case of immigration. In this case, for instance, the Spanish immigrant arriving in a bilingual Basque/Spanish setting is fully able to retain only their own language without any kind of learning/using Basque.

#### 2.4.2. Mobile lifestyle

While the sedentary lifestyle was the most common in traditional societies for centuries, for different reasons there have always been people who have temporarily left their original ‘sedentary’ communities, some of them time and again. With regard to the Basque world, we have taken five typical motivations into account: *transhumance* or, perhaps more often, *transtermitance* or intermittent, more local transhumance (above all working as shepherds); *long-distance trading* (for instance, Basque speakers who settled temporarily in Seville to take part in trade there); *sea and land transport*; moving somewhere for *higher education* (for Basques, Salamanca was particularly important in this sense); and *temporarily working away* (for instance, as stonemasons in Castile or fishermen in Newfoundland or elsewhere).

As in the Basque Country, in other places, too, there have been many substantial sociolinguistic events generated by temporary human movements back and forth motivated by the requirements of one’s job. Those comings and goings have often been particularly important in terms of their influence on the development or survival of languages (i.e. of the groups of speakers constituting the human base of those languages). There are some other cases which, without being so widespread in the Basque Country, are fundamental in other contexts (Blanchet 1992: 16, 113): movements connected with grape and wheat harvests, and so on (there have been some such cases in the Basque Country, too: for instance, the Biscayan *gaztela-mutilak* – ‘Castile Lads’ –, Bustintza 1980). Tabouret-Keller (1968: 107-118) analyses many of the variables we mention here when comparing situations in Europe and Africa. This author addresses two dichotomies also picked up by SHB: *sedentary lifestyle vs migration* (in the article, Tabouret-Keller mentions daily and once-and-for-all migration), and also the *urban vs rural* dichotomy.

On the international importance of transhumance and transtermitance as sociolinguistic variables, see Trudgill (2002: 134), for instance: “In historical times, they [the *vlachs*] have traditionally been transhumant shepherds in relatively remote areas, which would explain their resistance to Slavicisation, with the largest concentration in Greece today lying in the Pindus mountains, focusing on Metso-

vo, today the major town which is Vlach speaking”. On transhumance, see also Blanchet (1992: 16, 113). On transtermitance, see Corbera (2013). On temporary migration for trade see, for instance, Thamin (2011): nowadays the phenomenon has a more complex structure.

### 2.4.3. Urban/rural dichotomy

This term and the following one (*ager/saltus*) can be viewed as special cases of a sedentary lifestyle. In both cases, there is a sociocultural relationship in addition to the geographical one. This variable has been relevant in sociolinguistic research.

A fundamental distinction must be made, in the first case, between the street (urban residence and ways of life) and the isolated farmstead. And, in specific cases, between the (capital) city, the village and the farmstead: the domains and, above all, the opportunities for specific role relationships are different for each residential zone (Hamilton 2001; Tabouret-Keller 1968). Behaviour can be quite different from one zone to another during the same period. All this is reflected in the language behaviour of individuals and groups. Nowadays, this distinction has largely disappeared from the Basque Country. Lifestyles in town, village and isolated farmhouse are increasingly alike: ease of movement and new communication technologies are levelling the playing field. The distinctions, however, have not been completely erased.

Furthermore, these distinctions do not only apply to speakers of Basque. Under one name or another, such a geo-cultural classification has been found useful in many parts of Europe when describing the urban/rural divide in the past (rather less so, today).

### 2.4.4. *Ager/saltus* dichotomy

In Europe, in the old Euro-Mediterranean world and later in Atlantic Europe, there is a much older distinction, that of *ager* and *saltus*. It is a distinction that dates from when Rome controlled most of Western Europe: many historians have made use of the dichotomy, adapting it to their needs and giving it varying degrees of prominence. Simplifying it somewhat, for these historians *ager* is the area where land cleared for farming predominates. In general, the *ager* was highly Romanized, both in the Basque region and elsewhere. *Saltus*, on the other hand, is the land predominantly used for pasture: wooded and mountainous areas whose territorial organization was very different from that of the European-Mediterranean model on the rise at the time (and from the urban life it brought with

it), and where Romanization was relatively scarce or non-existent. Some authors have interpreted this division in almost black and white terms. Others, however, see the two as being complementary. A third group would like to avoid the terms altogether, viewing them as unfit for analytical purposes. However, if one does without the two it is not clear how the differences which did exist between the two spheres should be conceptualised (Larrañaga 1999; 2008). Montanari, for instance, states that “Roman culture, like Greek culture, did not have a high regard for the uncultivated nature. (...) It was rather the true antithesis of civilisation (...). An antithesis also to an artificially created order. (...) The Latins called the totality of the cultivated land *ager*, which they strictly distinguished from *saltus*, the virgin, uncultivated soil.” (Montanari 1997a: 35). Later, but without specifically naming *ager* and *saltus*, Montanari gives more information about this question (1997b: 169): “the contrast between these poles of the natural and the cultivated, when it does appear, is the fruit of an ideological decision rather than a real contrast. Moreover, the line between the use of cultivated and uncultivated land, between ‘wild’ and the ‘tamed’ economic system, is much less sharply drawn than one might think.” Whatever the precise borderline may be, the distinction between *ager* and *saltus* seems to be one that SHB must take into account.

## 2.5. SOCIO-FUNCTIONAL POSITION

In this section, one of the most critical for sociolinguistics, we are primarily going to examine socio-functional space, a term that reflects what a language is used for in specific domains or spheres of use within relationship networks, groups of speakers or entire speech communities (Fishman 1965b). Here are a couple of examples of socio-functional space: a) written use of language in public administration; b) the dominant informal, spontaneous language behaviour at village festivities, local pilgrimages and similar festive events in the province of Gipuzkoa in the 19th century.

After positioning an event of obvious sociolinguistic interest in terms of time and place, we also need to define it in terms of its socio-functional position. To define socio-functional space (*socio-functional position* in SHB’s terminology), we develop three concepts in the following subsections: domain, role relationship and language status.

### 2.5.1. Domain

What is the sociocultural context where the use of the language takes place? More precise or more general answers can be given: the *role relationship* discussed in the following section offers a more detailed response, whereas the con-

cept of *domain* provides a more general answer. As far as we are aware, Joshua A. Fishman is the author who has used this term most profusely and profoundly in the field of the sociology of language. Summarising his contribution (Fishman 1991: 44), we can say that the concept includes exchanges or relationships which are embedded in one major societal institution or another; it includes both topic and situation.

Fishman (1965b: 73) had years before offered a broader definition of domains: “[domains] are defined, (...) in terms of *institutional contexts or socio-ecological co-occurrences*. They attempt to designate the *major clusters of interaction situations that occur in particular multilingual settings*”. Fishman (1972c: 82) also offered the following definition: “a domain is a socio-cultural construct abstracted from topics of communication, relationships and interactions between communicators and locales of communication in accord with the institutions of a society and the spheres of activity of a culture in such a way that individual behaviour and social patterns can be distinguished from each other and yet related to each other”.

When defining domain, importance is normally conceded to societal institutions: family, religion and so on. However, we should not forget the physical space itself (*locales of communication*, in the previous quotation). Specific domains often have their own physical spaces: for instance, most activities connected with the church appear in places connected with religion. These are mostly churches, shrines, cathedrals, seminaries and convents, although not exclusively so (for instance private homes, when grace is said before lunch or supper).

It should be stressed that domains have no intrinsic, permanent structure: the domain set to be applied may change considerably from one place to another and, particularly, from one century to another. Fishman has also stated on occasion that the number and classification of domains need not be unique. On the contrary, each socio-cultural context must be given a bespoke classification (Fishman 1965b: 73): “We can safely reject the implication encountered in certain discussions of domains that there must be an invariant set of domains applicable to all multilingual settings. If language behaviour is related to socio-cultural organization, as is now widely accepted, then different kinds of multilingual settings should benefit from analyses in terms of different domains of language use, whether defined intuitively, theoretically, or empirically” (see also Fishman 1972a: 81). For this reason, we have tried to establish a set of domains that will be useful over a fairly long period. Finally, as domains are primarily to be applied to material from the 18th, 19th and 20th centuries, the following set seems appropriate for the work we are undertaking: nine wide-ranging domains have been chosen, although we are well aware that the weighting and contents of each

domain vary according to the lifestyle of the time. The contents of the *religion* domain, for instance, have changed noticeably over the centuries depending on the varying degree of power wielded by the institution, having less influence on the lives of most contemporary Basques now than it had on those of a century or two ago. The list of the nine main domains appears in table 8.

In any case, “functions of language behaviour” and “domains of language behaviour” should not be treated as mere equivalents. As Fishman (1965b: 75) says, “‘Functions’ stand closer to socio-psychological analysis, for they abstract their constituents in terms of individual motivation rather than in terms of group purpose”. Fishman (1972c: 116-117) has provided more detail in another article:

The proposed functions have been advanced to help answer the questions “why did he speak and say it the way he did when he did?”. The proposed domains are oriented more toward macro-societal normative regularities than toward individual purposes, although these two levels should be commensurable with each other. The list of “functions” varies widely from one author to another. For example, Karl Bühler (9): *Auslösung, Kundgabe, Darstellung*; Roman Jakobson (48): referential, emotive, conative, poetic, phatic, metalingual; Dell Hymes (47): expressive, directive, poetic, contact, metalingual, referential, contextual; Edward Sapir (70): communication, socialization, cultural transmittal and accumulation, individualization; George Barker (4): group-defining functions (coordinating group activity, symbolizing group membership, transmitting patterns of thought and behaviour), group-relating functions (relating the individual to the group, relating one group to another). Additional functional categories particularly related to utterances have most recently been reviewed by Ervin-Tripp (16b). Other lists of functions have been proposed by Kenneth Burke, J. R. Firth, C. K. Ogden and I. A. Richards, Bruno Snell, and a host of others interested in language, literature or life. While a mere enumeration cannot pretend to do justice to the historical relationships between the several systems of functions listed here, it should be noted that all of the lists have in common “an interpretation of the factors of the speech event in terms of motive or purpose” (47, p. 30)

Domains of language behaviour have been included in this section whereas the functions of language behaviour will be included in the section on language behaviour.

Table 8: SHB domains

Name	Notes on contents
Authorities and administration	Domain related to public authority and administration. Includes all levels of authority and administration: both territorially-specific (village councils, provincial councils, parliament) and general (security forces, health services etc.).
Leisure and sport	Domain related to free time. Present day: all types of sport (participants and spectators), travel and other leisure activities (cultural trips, NGOs etc.); contexts more important in the past than now: religious celebrations, village festivities.
Religion	Domain related to religion. For example, church ceremonies, seminary training and, in general, the church's relationships with people and between people in a religious context.
Home and family	Domain related to language behaviour at home and in the family. This domain has shrunk considerably over the last century: there are now fewer people in a household and their relationships are not so intensive.
Neighbourhood: friends and acquaintances	Domain related to the network of intimate interlocutors, the neighbourhood or friendships. Apart from the family and, in some cases, work, the group of people with whom face to face relationships are most intensive.
Mass media	Domain related to the media, both in terms of information distribution and people's habits and ways of consuming information. For instance, the activities of the town crier in the past or present-day television and newspapers.
Education	Domain related to education, independently of educational level or institutional ownership. For instance, primary school, secondary education and university. Over recent decades, evening schools, Basque language schools for adults and so on have to be included here.
Work sphere	Domain related to the world of work, both in terms of its contents and relationships between workmates and owners or other decision-makers.
Trading	Buying and selling in themselves and, at the same time, the transport of the goods involved. Also, more recently, financial institutions.
Other	To be used when it is not possible to assign a quotation to any of the above categories either because the text does not specify the domain or mentions one not included above.

These sweeping categories cannot always be applied without overlapping. Let us suppose, for instance, that we have to classify a 17th century church court case: the quotation can be classified as part of the *religion* domain and as part of the *authorities and administration* domain and, so, must be marked as both. In the same way, relationships between customers and workers in any company belong to the domains of both *trading* and the *work sphere*, depending on the perspective adopted. To give a further example, if a language interchange takes place daily

at a local shop or at the market, the information must be classified not only as *trading* but also as *neighbourhood: friends and acquaintances*.

### 2.5.2. Role relationships

While macro-analysis of socio-cultural context is carried out by domain, role relationship is a tool for micro-analysis. In an article first published in 1964, Fishman (1972c: 82-83) describes the ins and outs of role relationships (Afendras 4-6). He chose a specific domain as an example: “Home and family”. Obviously, this domain is constituted by people and a list of them can be drawn up for examination; subsequently, in each case, those people’s language habits can be defined. For instance, in the family domain, the following people are likely to be participants: father, mother, sons and daughters, etc. Some authors consider (Gross 1951) such a list to be insufficient and that pairs must be established: father and mother, mother and son, son and mother, etc. In this case, a) there is a distinction between speakers and listeners, in other words, the first person in each pair is a source of production and the second person a recipient; b) the role relationship is taken into account, as Fishman (1972c: 82) says: “[family participants’] language behavior may be more than merely a matter of individual preference or facility but also a matter of role-relations”.

The role relationship variable is to be found in all domains. Let us now connect the two levels of social context – domains and role relationships – by the examples provided in table 9.

**Table 9: Domains and role relationships related**

Domain	Some significant role relationships
Authorities and administration	Institutional members with each other Institutional member with individual citizens, face-to-face Institutional members in public announcements
Leisure and sport	Sports players with each other Sports players with other interlocutors Sports players with trainers Leisure activity participants with each other (playing cards etc.) Leisure activity participants with other interlocutors
Religion	Religious and clergy with each other Religious and clergy with churchgoers in liturgical activities Religious and clergy with churchgoers, outdoors or in other non-church settings (for example, sports)

Home and family	Husband and wife with each other Parent(s) with child(ren) Siblings with each other Relatives with each other
Neighbourhood: friends and acquaintances	Young people with their friends Young people with adults, adults with young people Adults with adults In the street with strangers
Mass media	Reading: the press, magazines, novels etc. Listening: the radio, CDs Watching: television, cinema
Education	Teachers with each other Teachers with pupils/students Pupils/students with each other
Work	Workmates between themselves Workers with managers Workers with customers
Trading	Buyers and sellers at a market Sellers with distributors and transport agents
Other	Role relationships lacking an appropriate place in the above domains

In some of the examples in table 9, in addition to the role relationship, the domain is also defined. For instance, “Religious and clergy with churchgoers, in liturgical activities” and “Religious and clergy with churchgoers, outdoors”. So three variables have to be distinguished: domain, role relationship and topic of conversation. This takes us into a realm of considerable complexity, familiar enough in the field of sociolinguistics: in the work domain, for instance, a particular way of speaking may be used when the boss and the workers talk about work, and another when they engage informally.

These examples do not cover all role relationship possibilities: depending on the period, the documentary source and the research topic itself, there may be a need to specify relationships further. Because fixed groups of role relationships valid for all historical periods cannot be established, SHB has decided to create a single *role relationship* label. This term is used to mark up quotations with information about role relationships, but the label does not tell us exactly which role relationship is involved. The fact that it is not possible to specify role relationships with this label does not mean that they cannot be specified at all: see the *Dominance configuration table* in cell 1A and, in general, other tables with

similar formats (in cells 1B, 2A, 2B, 4A, 4B, 5A and 5B). There is, clearly, in all of these, sufficient opportunity to specify the role relationships under discussion. In addition, if distinctions have to be made between roles in a particular piece of research, the software application can be adapted to do so. The same can be done with the taxonomy, adding the pertinent entries.

### 2.5.3. Language status

Information about the relative statuses of languages in contact in diglossic situations is of particular interest to sociolinguistic research (Ferguson 1959). This term has a direct relationship with social stratification and research on overt and covert prestige. The full name given to this term in the SHB model is: *status: H/L*. A process of change may be described as resulting from a change from above or from below; when not linked to a planning process, this kind of information can be marked here. If such information is linked to a planning process, it should be marked in dimension 6. Diglossia is also specifically included in the taxonomy in the parts dedicated to language behaviour analysis.



### 3. GENERAL STRUCTURE OF SOCIOLINGUISTIC CLASSIFICATION

The model developed by SHB to classify the sociolinguistic aspects of quotations will be explained in this chapter and the following. To set up this classification model, we took the theoretical constructs which are habitual in the sociolinguistic field into account and have aimed at creating the most compact and robust methodology and classification possible. In addition to taking international sociolinguistic categorizations and theories into account, we have also tested and trialled the resultant classification on practical cases to confirm its significance and applicability. These tests and trials led us to adjust many points in the initial structure. What we are going to present in these chapters has thus been shaped by both this theoretical reflection on methodology and its practical application. The result is a classification model useful for SHB which can provide a taxonomy for the historical sociology of language.

The objective of SHB is not to make a mere collection of books or articles but, rather, to examine and present the social history of Basque in a systematic way, based on a unified methodological backbone. The discipline closest to the project is sociolinguistics, more precisely, sociology of language. It is from there that SHB has taken most of the theoretical basis for defining the project's methodological model.

The principal contribution is derived from the work of one of the founding fathers of sociolinguistics, J. Fishman. The following authors have also been very much taken into account: M. and U. Weinreich, C. A. Ferguson, M. Halliday, E. Haugen, H. Kloss, D. Hymes, J. Rubin, C. H. Williams, R. L. Cooper, W. E. Lambert, L. Milroy, A. Tabouret-Keller, B. Jernudd, R. B. Kaplan & B. Baldauf, B. Spolsky, H. Giles etc. In addition to taking classic works of sociolinguistics into account, the increasing contributions from the social history of language over recent years have also been borne in mind. The following publications are especially worthy of mention: Aquino-Weber *et al.* (2009), Gimeno (1995), Conde (2007), Willemyns & Vandenbussche (2006), Burke (1993), Jahr (1999), Hernández & Conde (2012) and Nevalainen & Raumolin-Brunberg (2003). For a more complete list, see the historical sociolinguistics bibliography on our project's website. Furthermore, classic contributions to the social history of given languages have also been examined: for instance, Spolsky (1983), Weinreich (1953), Jenkins (ed) (2001) and Kloss (1952). Naturally, works about Basque have also

been examined and taken into account: Prince Bonaparte and Ramón Menéndez Pidal, Julio Caro Baroja and José María Lacarra, Aingeru Irigarai and Anselmo de Legarda, Koldo Mitxelena and Fernando González Ollé, Jose Maria Jimeno Jurio and Ricardo Ciérvide, Alfonso Irigoyen and M<sup>a</sup> Teresa Echenique, Joseba Intxausti and Patxi Salaberri, Joaquín Gorrochategui and (most recently) David Peterson, among others.

In this chapter on SHB's sociolinguistic labels, the basic matrix will be explained: 'the forest of all the trees', to use a simile. In the second, on the other hand, the nature ('trunks') and internal structures ('branches') of each of the cells of the matrix – there are 30 of them altogether – will be presented. Thus, we will explain the basic structure of this sociolinguistic classification step by step in this chapter until we complete the whole matrix. To start with, the columns or, to use our terminology, dimensions of this matrix will be defined and, after that, its rows or analytical parameters. Finally, combining these dimensions and analytical parameters, we will be able to explain the general structure of the whole of the matrix. As we are examining sociolinguistic data from a historical point of view, we must not forget that, in addition to the classification explained below, the labels reflecting the socio-historical and geographical setting, i.e. where and when each piece of data is from, physically and socially, must also be applied to the quotations, as explained in the previous chapter.

### 3.1. THE DIMENSIONS OF SHB: AN OVERALL PERSPECTIVE

We will present five *dimensions* in the following paragraphs. SHB's dimensions bring together the different topics habitually discussed in sociolinguistics and, in particular, the sociology of language. We have coded these five dimensions A to E: *language use* (= Dimension A); *language competence* (this concept includes both knowledge of languages and speakers' levels of competence) (= Dimension B); *language structure* (sociolinguistic data provided by, or which could be extracted from, the structure of linguistic information – or its evolution – on vocabularies, morphosyntax, pronunciation and, on occasion, semantic make-up) (= Dimension C); *societal features* (any social characteristics other than language which nevertheless may be related to it: in particular, demographic, econotechnical, sociocultural and political-operative processes which sustain society and are sources of innovation) (= Dimension D); people's *opinions-attitudes-behaviours* towards languages, speakers and the use of one language or another (= Dimension E). Each dimension can be examined along with six different analytical parameters. The intersection between each matrix dimension and analytical parameter is called a *cell*; hence the matrix contains 30 cells in all.

### 3.1.1. Dimension A: language use

The social use of language is the fundamental dimension of SHB and of any taxonomy of sociology of language. That is precisely the function of Dimension A: to examine language use in the most systematic way possible. In other words, to describe speakers' language behaviour at a particular time and place. So it is to that column (to one of the six cells in that column) that quotations containing information about language use are assigned. So all documentation, above all face-to-face information, about language use is the prime raw material of SHB. The line of research Fishman (1965b) mentioned, with the classical "who speaks what language to whom and when?", is SHB's central concern too. That perspective is the core of Dimension A. SHB records mentions of the use of languages in society, in order to facilitate explanation within a structured framework and to be able to draw conclusions topic by topic.

In this dimension, language behaviour data's characteristics are more fundamental than in the others: in each quotation reflecting the use of one or another language, we wish to register several features. More precisely, when we are examining what language behaviour happens/happened at particular places and at particular times, we wish to distinguish the following features, among others: *media* (Fishman 1965b: 78; 1971b: 304 and 1991: 43-44), *overtiness* (Fishman 1971b: 304 and 1991: 44), *style* (Fishman 1965b: 70-71 and 1966: 427), *dominant language* (Fishman 1966: 434-438) and *language variety* (Fishman 1971b: 226-228). As Ayres-Bennett (2004: ix) has mentioned concerning French: "It is [...] clearly fallacious to assume homogeneity of usage, whatever the nature of the speaker, register, location or context, for any period in the history of French"; usage varies in terms of those five variables (Nevalainen 2006: 565). We must define those five features a little further: the examples we give below refer to the description of language use, the first analytical parameter. When we say *media* we are asking which language skill has been realised (Zalvide & Muñoa 2006: 231): was use spoken or written, or was the text read? When we mention *overtiness*, what we want to find out in each case of language use is to what extent it was public. Are we dealing with inner speech, reading in silence or the involvement of a group of people? With regard to *style*, we must deal with a continuum that goes from considerable formality to intimacy. Authors have divided that continuum up into many different ways. Ervin-Tripp (1969: 38-43) distinguishes two main levels (*formal* and *informal*); Hymes (1964) three (*formal or polite*, *colloquial* and *slang or vulgar*); and Joos (1968: 188) five (*intimate*, *casual*, *consultative*, *formal* and *frozen*). SHB has selected three: *formal*, *informal* and *intimate*. When we ask for the *dominant language*, normally what we want to know is the relative weight of languages that are used face-to-face (or side-by-side), in the situations defined by the features mentioned above. Next, *language*

*variety* defines which language or dialect is being used. Finally, the five parameters listed above must be crossed with a further two: *domain* and *role relationship* (Fishman (ed) 1976; Fishman 1991). We have already presented these two parameters when discussing the socio-functional setting of a piece of data in the context of its socio-historical setting. For all these features, pieces of data can be coded individually or, for specific places and moments, individually coded data can be grouped and tabulated. The resultant tables will be dealt with in greater detail in the discussion of the cell corresponding to each of them: see, in particular, 1A (*language use related dominance configuration table* [Fishman 1965b: 79-81]), 2A, 4A and 5A.

### 3.1.2. Dimension B: language competence

The second dimension (dimension B) examines speakers' *language competence*. In this case, what we are interested in is not who uses or has used each language but, rather, which language they know (or do not know) and, if they do, how far their knowledge of the language extends (in speech or in writing), according to the data gathered or inferred. In this dimension too, as in the previous, the precision of data available is highly variable: at one extreme, above all in the distant past, at best we can determine that a speaker or group of speakers knew one language or another (or not). In modern times, however, other details, expressed in terms of the four-way division of skills – listening, speaking, reading and writing – habitual in language psychology and language pedagogy, can also be obtained on occasion. That group of four, furthermore, is usually subdivided into two sets of contrasting pairs: on the one hand, 'active' (or, better perhaps, productive) skills and 'passive' (or receptive) skills and, on the other, oral and written skills. Work over the last fifty years, however, has added further segments to this classic formulation of skills: cultural skills, pragmatic competence, communicative competence, and so on (Goullier 2007: 15-17; CEFRL 13-14; CEFRL: 7-12; Canale 1980, Hymes 1972, Ek & Trim 2000). Unfortunately, SHB cannot take everything pedagogues have defined into account in detail: to achieve the objectives of sociolinguistic analysis, it often suffices to use simpler categories, even though the sciences of language learning have gone much further. In addition, as Fishman (1991: 43-44) clearly states, we are dealing with an implicational series here: if skills are listed as listening, speaking, reading and writing, each element on that list implies knowledge of its antecedent(s), but not the other way around. For instance, somebody who writes also knows how to read, speak and understand spoken language, at least in their mother tongue. On occasion, this implication table can help us deduce more information from the data available, but concerning L2, and above all when the second language has been learned at school, writing and reading skills do not necessarily imply oral skills. In any case,

within each pair of skills (in other words, oral and written skills), the implicational rules established by Fishman are fully valid.

Furthermore, knowing what language competence people have at a particular moment in time is no more than a part of what SHB is interested in: often, it is just as important to examine how that competence has evolved throughout life as a new language is acquired or, equally, when a language once known is lost.

As far as acquiring language competence is concerned, several analyses have been developed with the aim, among others, of guaranteeing more effective learning processes: changes by age in learning ability have been examined, there has been in-depth research into the influence of the order of languages learned (mother tongue and one learned later), work has been done to establish the phases of language learning, motivations have been categorized (distinguishing, for example, between integrative and instrumental motivation, internal and external motivation – Amorrortu *et al.* 2009: 35-37; Joly & Uranga 2010: 183-228), routes to learning have also been differentiated (was the language learned at home and in the neighbourhood, or in a place of learning specifically established for that purpose?). SHB cannot take all these aspects into account. For its objectives linked to the sociology of language, in general, distinguishing between ways of learning is sufficient: have people acquired the language in question informally in their daily life or through formal education? Concerning Basque, its being taught (or not) at school has often been linked with its survival and decline. Distinguishing routes to language acquisition is indispensable if one wishes to evaluate the validity of that link.

The last of the three subsets, marking a loss of language competence, is not usually of interest to pedagogues. SHB, on the other hand, is particularly interested in this third branch: did speakers lose their communication skills at a particular moment? In which language did they lose it? When somebody who learned Basque at home loses it and also when someone loses a language learned later (whether Basque or some other), knowing how this happened is a fundamental piece of information, as important as data on acquiring language competence.

In the Basque case, it is clear that data on language use must often be collected indirectly (in our terminology, by *inference*) because in many cases there are no documents with direct pieces of information available. When an old document states that in a village or district most speakers were monolingual (in a language other than Basque or, especially, in Basque), in addition to telling us about the language competence of those speakers the text is also casting light on language use there: if all or the vast majority of speakers at a particular place were monolingual Basques, it is clear that only Basque (to be exact: almost only Basque) was used in that district at that time. To put it another way, the language

*competence* of speakers (individuals or particular groups) is also fundamental data for SHB when it comes to clarifying the nature of the *use* of Basque or other languages (and, hence, of Basque) at a particular time and in a particular place.

### 3.1.3. Dimension C: language structure

Among the data involving the language itself, a third dimension must also be taken into account: that provided by intra-linguistic testimony. In theory, any branch of linguistics is potentially informative in sociolinguistic terms. However, some specialist areas (including disciplines closer to sociolinguistics and history of language) may be particularly fruitful for the social history of languages. So SHB must also consider these disciplines, to clarify the current sociohistorical situation and, above all, to be able to throw more light upon and further define situations from the past, especially the distant past.

What types of parameters must be distinguished in this dimension? Initially, we believed that there were three areas that could not be ignored: onomastics, dialectology and the linguistics of language contact. However, as we worked on the classification of specific examples we had collected, we came to a broader formulation, distancing ourselves on occasion from the conceptualisations habitual in linguistics. It must be stressed that SHB's objective is not to check linguists' contributions. Nor, in general, is it to examine objects from linguists' perspectives (or to use their tools). Rather, SHB aims to make use of descriptions and research from linguistics to the extent those contributions can provide information that will help to clarify the social history of Basque. Here, then, are the five areas which we now differentiate: global descriptions and special contributions from synchronic and diachronic linguistics; the results of language contact; internal uniformity of language or lack of it (dialects, etc.); power and solidarity indices; and, lastly, other significant sources. We will now explain what we classify in each case and why we are distancing ourselves from linguists' usual categories.

- When examining *global descriptions* and special contributions, the first group includes sociolinguistic data derived from drawing up a general synchronic language description and/or the historical evolution of its components.
- In the case of the *results of language contact*, we have avoided the term “contact linguistics” because our work is not usually linguistic: interferences, loans and code-switching are all things we are interested in, of course, but not in themselves, only to the extent to which they throw light on the sociolinguistic situation. When a word is accepted into one language from another, a new cultural concept, too, is often accepted. In

the Basque case, we ask: where do words and the concepts linked with them come from, where do they go to and when did they arrive? Who (from which part of society, in which activity?) introduced the word, and how widely was it later used? These questions provide another (if roundabout) way of obtaining sociolinguistic information. In short, in this parameter, sociolinguistic information is obtained from the consequences of relationships between languages.

- We have called the third parameter *internal uniformity of language* because it is not exactly dialectology that we are dealing with. The data field we are interested in is broader than dialectology and, in the final analysis, we are interested in it for reasons which have nothing to do with dialectology: the information which dialectology can provide us, along with that given by efforts to create a standard language, informs us about a language's degree of dispersion or unity. The dispersion or unity of that internal structure accompanies, or is a consequence of, the degree of dispersion or unity of the social forces accompanying those features. In this sense, SHB takes a particular interest in the degree of internal cohesion.
- Fourthly, particular attention has been given to *power and solidarity indices* (cf. Brown & Gilman, 1960): it is well-known that the social configuration reflected in a language's pronoun systems may be highly significant. In this respect, the use of Basque '*hitanoa*' verb forms should also be taken into account: it is a clear example of evolution in what is (has been) socially meaningful.
- Lastly, the *significant source* group, too, is broader than the traditional onomastics which forms its basis. In addition to place-names and personal ones, names of social groups, languages and objects may also be of use to us. There is no doubt, however, that toponyms and anthroponyms are central for SHB, indeed extremely important when no other documentary source or data for making inferences is available.

### 3.1.4. Dimension D: societal features

Fourthly, we must mention a very different type of dimension which, unlike the previous three (and therein lies its distinguishing feature), does not have a specific linguistic aspect: *societal features* or social matrix. This fourth dimension, however, is fundamental for the SHB project. The connections which *the social organization of language behaviour and language use* usually has with sociocultural processes make it essential to study their mutual influence or, at

least, their covariation. This dimension is analysed many times in works on sociolinguistics (see for example Raumolin-Brunberg 1996: 21-24). Auer (Auer *et al.* 2015: 8) has explained how interesting it could be for historical sociolinguistics to examine various changes in the social matrix: “historical sociolinguistics is also concerned with the roles that the architecture of modern society and the institutional modern (nation) state have played in the historical development of languages and varieties. Especially the linguistic consequences of urbanization, industrialization and the verticalization of society have been of particular interest, as they help us to understand the development of the varietal spectrum of modern speech communities (e.g. Salmons 2005a, Salmons 2005b)”. We have thus established this fourth dimension to be able to reflect the processes linked with the social situation of languages. Fishman (1972a: 152) stresses that connection: he believes that we should very much take into account “[the] psychological, social, and cultural processes that are associated with ascertained changes in habitual language use”. To put it another way, language and society are not completely dissociated from each other, as each person and social group moves within a particular social matrix, individuals and speech communities develop and adapt their use of language, skills, habits and opinions according to that social atmosphere. Therefore, when the social matrix changes to any extent, changes of different degrees can take place in the social organization of language behaviour, in speakers’ language competence, in a language’s structure and also in opinions about languages and their speakers. The same is true even in cases of language decline (Dorian 1989). As a result, changes in societal features must be appropriately recorded: to understand the situation of a language, knowledge of the relevant social norms is essential. When wishing to write the social history of a language, the “human/societal” component cannot be overlooked. This component, furthermore, has given sociolinguistics its meaning and *raison d’être* (Calvet 1999). So SHB inevitably needs to reflect this component in its global taxonomy and in the project’s methodological framework. By way of example, in the field of history, too, when underlining the importance of the social organization of space, García de Cortazar (2004: 292-295) has pointed out the changes and innovations occurring in the language.

The field covered by the social matrix, in itself, is broad, much broader than that of language: potentially, we could include the whole of history in dimension D. Boundaries, then, must be established if we are not to be swamped by the broad scope of the task. Let us stress, therefore, what is of most interest to us: it is not just any type of social event, nor any type of transformation in the structure of society, but, rather, the facets of the social matrix which may be related to sociolinguistic events in some way (by cause, effect or covariation). Data on the societal features we are interested in is completely situational, depending on the

population, the period, the place and, when appropriate, the domain under study. Take, for instance, language changes in the Basque Church from 1960 to 1980: there is no need for us to provide information about the substantial technological changes which took place in the iron and automotive industries at the same time and, so, there is no need to take them into account. Not, at least, in the same way as if we were researching how language behaviour evolved in the small town of Lesaka between 1960 and 1980 on account of its large sheet metal factory. The celebration of the Second Vatican Council in Rome at that time, on the other hand, is extremely relevant to language use in the Basque religious domain.

In the light of the previous approaches to this topic, societal features have been divided up into four components: the demographic, the econotechnical, the political-operative and the psychosocial and sociocultural. Mackey (1968: 563-565), for instance, lists the following for describing bilingualism: economic, administrative, cultural, political, military, historical, religious and demographic variables. Raumolin-Brunberg (1996: 21-24) describes the following variables: demography, political life, economy, social order, family and kinship, culture. See also Fishman (1972c), Mackey (1973, 1976, 1979) and Cooper (1989). As we will see later in this book, most of the variables determined by those researchers are included in the four components of our taxonomy.

### 3.1.5. Dimension E: language opinions, attitudes and behaviours

People usually have their opinions, attitudes and behaviours concerning the dimensions mentioned above. They may also have opinions about other people's opinions, attitudes and behaviours: with what type of mentality or perspective do people who have experienced (from within, alongside or from the outside) that language evolution regard it? What type of discourse or narrative do they create? When drawing up SHB's analytical scheme, the need for this dimension was never questioned: as Lasagabaster (2006: 1) stresses, attitudes are studied in many scientific disciplines. Agheyisi and Fishman (1970: 137) also underline the importance of this topic for sociolinguistics: "Though attitude studies have not yet attained such prominence in the relatively young field of sociolinguistics, the relevance of attitude studies to such sociolinguistic topics as language choice in multilingual societies, differential allocation of codes, dialect differences and mutual intelligibility – to name a few – is obvious". Fishman always pays particular attention to the issue of attitude (Garcia *et al.* 2006: 29-37). Auer (Auer *et al.* 2015: 8) has underlined that in historical sociolinguistics, too, it is an indispensable topic of research: "any language history remains incomplete unless we take into account not only the social variation of language but also the (conscious or unconscious) ascription of values to linguistic forms and registers by society or parts of it". This

dimension of attitudes and representations should not be undervalued, as it exercises considerable influence on everyday sociolinguistic reality. Hunt (1989: 7) while plumbing the epistemological depths of the topic, reminds us of the importance of representation by quoting Chartier (1982: 30): “The representations of the social world themselves are the constituents of social reality”, it is not the reality of the behaviour that is the most important to understand social reality and social behaviour, but the way that people appropriate this reality, its representation.

This dimension’s name in itself indicates which three parameters must be differentiated. Let us try, then, to explain the difference between language opinions, attitudes and behaviours, making use of some examples given by Baxok when putting together a questionnaire.

- If I express agreement with the sentence *Nowadays all children should study Basque*, I am giving my opinion.
- If I answer the question *If you had children at school, would you like them to study in Basque or in two languages?* I am expressing my attitude.
- Finally, if I answer the question *In which language did you receive your first year of education?*, I am giving information about my behaviour or, perhaps, that of my parents.

Those opinions, attitudes and behaviours may be recognised and explicit, or unnoticed and unconscious: the latter are often the most significant for understanding language use.

The third parameter, behaviour, is directly connected with the first dimension (language use), which is, when it comes down to it, the description of an action. This dimension E, on the other hand, serves to examine whether attitude and action are coherent. From the sociolinguistic point of view, it is a highly significant piece of data when somebody (an individual or a broader social group) says one thing and does another: when studying sociolinguistic situations of language conflict, one inevitably enters a world of cognitive dissonances. In addition, there is a need to distinguish theoretical attitudes and the attitudes and reasons influencing action (July 2004a: 297-301). Finally, another issue is that of defining the connection between attitudes and language competence. It is often stated that people with a more favourable attitude learn Basque better, but one could also ask: is their attitude not better because they learn the language better? All of the above issues, then, are relevant to this dimension.

About this dimension, another important topic must be examined: what is an opinion, and what is not? To make this dimension operative, the boundaries of opinion must be defined. “Opinion” cannot be understood in an excessively broad

sense because, otherwise, anything could be seen as opinion: the Trinity is an absolute truth for Catholics, as reincarnation is for traditional Buddhists; but both are no more than personal opinions in the view of atheists. Clearly, it is not easy to define where opinion starts and finishes. Taking the project's sociolinguistic perspective into account, it is worth clarifying the question from the perspective of sociolinguistics and scientific laws. Not all authors' evaluations and statements are necessarily opinions.

When writing the social history of a language, the following five points are of interest with regard to opinions. Readers will immediately observe the connection between these points and SHB's five dimensions. Quotations providing data about these five points must be classified in dimension E:

1. Opinions about usage: for instance, in the case of cell 1E, in given places and at given times (in 1940 in Biscay and Gipuzkoa and in the Spanish "Siglo de Oro", for instance), saying that using language A or B is good, bad, ugly, desirable, and so on.
2. Opinions about language speakers or their skills: for instance, again in the case of cell 1E, in given places and at given times, saying that Basque speakers (or speakers of other languages) were good, ugly, evil, admirable, lazy and so on. Being in favour of or opposed to learning Basque is also to be situated here. Thus, the two aspects directly connected with dimension B (being competent and acquiring competence) are covered here: for instance, "Basque speakers are stubborn/simpletons", or "people learning Basque are nice/real fools".
3. Opinions about languages: saying that in given places and at given times Basque (or another language) is beautiful, ugly, new, old, local, foreign, capable or incapable (of expressing something or fulfilling a particular function), traditional, derived from another language and so on.
4. Opinions about ethnicity: in given places and at given times, saying that speaking in Basque (or another language), not speaking it, knowing it, not knowing it and so on is a necessary condition to be Basque (or a member of another ethnic group). This fourth point also has a collective dimension, which can be divided into three categories, in terms of the following questions: 1) Which language does the speech community use?; 2) What are its ethnocultural characteristics (ethnicity)?; 3) Where are the people from (territorial definition)?
5. Opinions about language attitudes: saying that, in given places and at given times, people having a certain attitude to language (for instance, having linguistic consciousness or not) is good or bad and so on.

The main lines of research on attitudes habitually mentioned in sociolinguistics dovetail with our categories. Agheyisi and Fishman (1970: 141) recorded three that are reflected in our taxonomy proposal: “1. those dealing with language-oriented or language-directed attitudes; 2. those dealing with community-wide stereotyped impressions toward particular languages or language varieties (and, in some cases, their speakers, functions, etc.); 3. those concerned with the implementation of different types of language attitudes.”

Even having defined these five areas of interest, we need to clarify the boundaries between reality or action and opinion. The project has taken a clear decision in that respect: it pursues neutrality, taking what is said to be a fact. To stop people classifying the data from becoming judgemental, and to avoid disagreement between researchers, in SHB we have tried to classify information dispassionately. In this way, neutrality is guaranteed. Subsequently, each researcher will extract from each piece of information the conclusion they see fit. For instance, if an author were to write that “The Spanish monarchy has done a lot of work to make Basque more widely known and protect its everyday usage”, that statement would not be classified as an opinion: we would treat it as if it were objective information even if we well know that it is not the case. Furthermore, in the methodological field, what some of us may take for a fact other authors may see as opinion. In the latter case, too, it has been decided to classify it as fact. In short, opinions reflecting a fact are taken to be fact. Indeed, the objective of the database is not to judge the information but, rather, to collect it, give it structure and classify it.

To continue with the previous example, if author X were to make such a claim about the Spanish monarchy, we would include the quotation in cell 6A on status planning. At the same time, if another author were to say that “the statement made by author X is not correct: it is no more than an opinion without basis in fact”, that statement too would be included in cell 6A and not in column E. In short, we have taken the original information (from author X) to be a fact; so what the second author takes to be “opinion” is “fact” as far as we are concerned. Actually, although confirmations and denials of fact are not themselves fact, they do strengthen or weaken the fact.

### 3.1.6. Summary of the dimensions

SHB uses the five dimensions listed in table 10.

Table 10: *Dimensions*

Code	Name	Contents
A	Language use	Social use of language (or, when appropriate, languages) at given times, in given places.
B	Language competence	Speakers' language competence (in Basque and, when appropriate, in languages other than Basque) at given times, in given places.
C	Language structure	Testimony which the language itself provides us with through its internal structure and gives information about the sociolinguistic situation.
D	Societal features	Features of the social matrix and/or, to put it another way, societal features lacking direct language-related content.
E	Language opinions-attitudes-behaviours	Opinions, attitudes and behaviour relating to Basque and languages other than Basque, at given times, in given places. Their subject matter can be data from any dimension.

## 3.2. SHB'S ANALYTICAL PARAMETERS: OVERVIEW

Taking the usual branches of sociolinguistics research into account, we have included six analytical parameters: the *descriptive*, *kinetic*, *dynamic*, *prospective*, *contrastive* and *prescriptive* parameters.

### 3.2.1. The descriptive (or first) analytical parameter

The descriptive parameter examines primarily how the language situation stands. In other words, how things stand at a given time and in a given place with regard to language: how things stand with respect to language use; how things stand in terms of the language competence of individuals and (by derivation or perspective, of groups of speakers); how language itself stands at a given time as a result of its historical development (what matters are commonly dealt with in that language and, so, what it is capable of expressing, what it is not so fit to express; whether a standard language is available or not etc.); in what type of social matrix all that takes place; and, lastly, the opinions, attitudes and behaviours the different actors display concerning the languages or

speakers in question, as well as topics such as the use of language A in relationship-network X. The descriptive parameter takes all of this into account. Fishman (1972a: 3) divides sociology of language into two main areas, and one of those is descriptive, summarising its objective as follows: “descriptive sociology of languages seeks to answer the question ‘who speaks (or writes) what language (or what language variety) to whom and when and to what end’. Descriptive sociology of language tries to disclose the norms of language usage –that is to say, the generally accepted social patterns of language usage and of behaviour and attitude toward language– for particular social networks and communities, both large and small”. The second main section of the sociology of language in Fishman’s opinion (1972a: 3) includes the kinetic and dynamic sociology of language (discussed below).

The descriptive parameter includes historical synchronic research, the description of the sociolinguistic situation of a particular historical period. Historical diachronic research (examining the historical evolution of a feature) is included in the second analytical parameter.

### **3.2.2. The kinetic (or second) analytical parameter**

The kinetic parameter analyses primarily how things are changing. Whether the languages used are changing or not, to start with. And if, as often happens, they are changing, what is the nature and extent of that change. Change, in general, is a normal occurrence in society, open as a society and its structures are. Change is usually a way of facilitating the survival of social structures and of adapting to the conditions of a new environment. In line with Ibañez, Malaina (2008: 15) summarizes the normality of change in this way: “In turn, Ibañez defines society as an open system, ‘open to change’, which ‘reproduces itself by changing’”. The point or place where change is occurring is of particular importance for the kinetic parameter: where in physical-geographical space, where in functional space and where in social space? Which social groups, which elites and exactly which type of common people have set that behavioural change in motion? Changes in the principal patterns of language use do not occur in all places and domains or functions simultaneously, nor to the same degree.

The kinetic parameter takes into account the various possible evolutions at the sociolinguistic level; it is important to underline that language maintenance and shift are included within that evolution. In fact, maintenance is a kind of evolution, especially in some particular situations: when there is a change in society or in the societal matrix but there is a maintenance in the sociolinguistic configuration of the society.

### 3.2.3. The dynamic (or third) analytical parameter

The dynamic (or causal) parameter analyses primarily why things have changed or why they are changing. This is the field of research where the founding fathers of sociology of language have dedicated the greatest effort to the conceptual elaboration and, even so, it is still where most work is required. The use of a language is neither strengthened nor weakened by chance. It happens for a reason. A similar thing happens to individuals: there is always a reason why speakers lose their mother tongue and learn another; why some monolinguals become bilingual; and why some bilinguals become monolingual. This dynamic parameter can be applied to all the dimensions that historical sociolinguistics addresses. It is probably, along with language planning, the sociolinguistic parameter which has attracted most attention from researchers. In any case, one of the main areas of interest of this social science has been to try to clarify why sociolinguistic changes and innovations of one sort or another happen. The motivation for this interest is evident: by knowing the reason, it is possible to understand more clearly where that reality has come from, to predict the future to some degree and, also, to try to change it through planning. It is precisely those reasons which are the object of research in the dynamic sociology of language. What we have just stated in an unsophisticated form has also been affirmed with more elaborate terminology in a number of the main texts of the sociology of language: according to these texts, the fundamental task of the dynamic field of research is to examine the degree and manner of covariation of the social organization of language behaviour (and attitudes and behaviours with regard to languages and speakers) with earlier, simultaneous, subsequent or exceptional socio-cultural processes.

To conclude, we should mention that for Fishman the dynamic parameter was the second main section of the sociology of language. Fishman (1972a) divides the sociology of language into two main areas: *descriptive sociology of languages*, mentioned above, and *dynamic sociology of language*. Fishman (1972a: 3) summarises the objective of the dynamic parameter as follows: “*-dynamic sociology of language-* seeks to answer the question ‘what accounts for different rates of change in the social organization of language use and behaviour toward language?’ *Dynamic sociology of language* tries to explain why and how the social organization of language use and behaviour toward language can be selectively different in the *same* social networks or communities on two different occasions. Dynamic sociology of language also seeks to explain why and how once similar social networks or communities can arrive at quite different social organizations of language use and behaviour toward language”.

### 3.2.4. The prospective (or fourth) analytical parameter

The prospective parameter tries to answer the question if things remain/ evolution continues the way they are, where will we end up? There is not, as far as we know, a specific section in the international technical bibliography dedicated to this analytical parameter, even if it is latent in much language planning. Concerning Basque, however, substantial attention has been paid to it from the 17th century onwards. The prospective parameter takes a particular interest in calculating where the waters of language change are likely to ferry us. Between the present moment and some point in the future (for instance, in the next generation, in fifty years etc.), should one expect the use of the language to have extended (language spread) or become more restricted (language decline, shift, loss, death)? In which places, functions and to what degree? This is the main topic of research in the prospective sociology of language. Additionally, this field includes many other topics: to what extent a speaker, over their lifetime, might be expected to master language A or language B increasingly well or increasingly poorly; what breadth is to be expected in terms of the set of varieties of the language in the future: whether the language is heading towards a unified standard or not and, finally, in terms of interference and code-switching, what the main results may be in given relationship networks and domains; what speakers' opinions about, and attitudes towards, their own language and that of others may be in the future.

### 3.2.5. The contrastive (or fifth) analytical parameter

The contrastive parameter, among other topics, examines the following question: is the *current situation* of a language or languages (or their projection into the future) *to the taste or not* of their speakers? Do they agree or disagree with the situation? As the name itself indicates, this fifth field of research usually compares and contrasts two elements, normally explicitly, occasionally implicitly: on the one hand, the current situation of a language or languages (or a projection about their future) of interest to a speaker or group of speakers. On the other, the situation which they would like that language or set of languages to have at present or in the future. To put it another way, this fifth field of research asks: where are we headed and where should we be headed? Where should we be and where are we now? In this respect, it is not important whether this reality has already happened or is just foreseen. What is important is that we contrast this apparently objective present or future reality with our wishes. So in this field of research, there are always two aspects at play: on the one hand, current or foreseen reality; on the other, a desired or affective aspect.

That contrast has a familiar source, of course; let us start from the definition which Weinstein (1980: 56) gave of language planning and its objectives:

“Language planning is a government authorized, long-term, sustained and conscious effort to alter a language’s function in a society for the purpose of solving communication problems”. The objective, he believed, was to solve communication problems. Let us compare that definition with the definitions of language planning given in two further formulations. Jernudd and Das Gupta (1971: 211) define language planning as follows: “political and administrative activity for solving language problems in society”. Fishman (Fishman (ed) 1974: 79), on the other hand, believes that language planning can be defined as: “the organized pursuit of solutions to language problems”. In these two definitions, the objective of planning is to solve “language problems in society”, a broader objective, therefore, than Weinstein’s. Communication problems may be the object of language planning, but not necessarily so, as the other two definitions make clear.

Whether this is a social problem or not, and whether one is aware of that problem or not, is closely connected with each individual’s ideological make-up. When one studies the contrast that is central to this parameter, it usually turns out that the ideal or affective prong of that contrast proves to have an ideological basis. A given problem will arise (or not) depending on the dominant ideologies in society and, as far as we are concerned, on the ideologies of the authors who provide testimony on the language. If an author does not agree with a particular linguistic situation, in the belief that the situation should be otherwise, that author has made an evaluation grounded in a particular sociolinguistic ideology, which sometimes has its origins in a more general ideology.

Effecting that evaluation or contrast has a specific result or consequence. The person making the contrast may see a substantial difference between the two elements, a small difference, or think that there is none at all. After making that contrast, if the members of a speech community are roughly in agreement with the current or foreseeable situation, they may do nothing about it: they have measured the situation and agree with the results obtained from the contrast. Nothing is arising from the contrast which might lead to new initiatives. On the other hand, if they observe a lack of fit between the desired situation and the current (or foreseeable) one, they may see a “problem” of lack of coherence needing to be resolved. In such cases, making use of language planning has been the typical solution. To put it another way, if a lack of cohesion or fit is detected between the two aspects in this fifth parameter, it becomes a bridge or trampoline towards the sixth, a source of motivation for solving the “problem” which has arisen.

### 3.2.6. The prescriptive (or sixth) analytical parameter

If it is believed that some facet of the current linguistic situation is inappropriate, and, as a consequence, one wants to achieve a different configuration, what

should be done to that end? The prescriptive parameter analyses *what could be done and what has been done to achieve that objective or end in a particular situation at a particular historical moment*. This sixth field of research has been called applied sociology of language (Fishman 1991). As an academic discipline it follows on from the applied linguistics of old, but it has grown considerably over the last forty years in particular and has also developed its own conceptual schemes. The famous distinction of Heinz Kloss (1969), between language *status* and *corpus* planning, has won new heirs since then. Among more recent developments, *language acquisition planning* (Cooper 1989) has been the most widely used. These three types of planning correspond to the first three of the dimensions mentioned above: status planning dovetails with the plane of language use; *language acquisition* planning with the plane of individual speaker competence; and the third, *corpus* planning, with the internal structure of the language itself (vocabulary, in particular) and graphization concerns. To the extent to which the social matrix is planned, almost any type of planning could be included in the fourth dimension: family planning, industrial planning, health planning etc. However, they are not all of equal interest for SHB. We are nevertheless particularly interested in identity planning, since this type of sociocultural and political operative planning tends to be closely connected with language matters. Finally, about the fifth dimension, efforts to influence language opinions, attitudes and behaviours are of particular interest. All these types of planning are not necessarily from the present day: many initiatives from the past can also be included in this field, even though the denomination of language planning was neither known nor used.

### 3.2.7. Summary of the analytical parameters

The data which the SHB project is gathering are classified into five dimensions and six main parameters. In summary, the first line of research, the descriptive parameter, examines things as they are; the second, the kinetic parameter, looks at how things are changing; the third, the dynamic or causal parameter, analyses why things have changed (or why they are changing); the fourth, the prospective parameter, aims at gathering explanations which try to foresee where we will end up if we carry on the way things are going; the fifth, the contrastive parameter, examines whether we are comfortable with the situation we are in or are likely to find ourselves in, and the language opinions and attitudes we develop as a result; and, lastly, the sixth, the prescriptive parameter, looks at what can be done, when, how and using what means to improve the current situation and get as close as possible to achieving our desired objective. Table 11 provides a summary.

Table 11: *Analytical parameters*

Code	Name	Contents
1	Descriptive	How things stand
2	Kinetic	How things are changing
3	Dynamic	Why things are changing
4	Prospective	Headed the way we are, where will we end up?
5	Contrastive	Whether we are at ease with the situation we are in, or with the future we believe we face
6	Prescriptive	What can be done, when and how, using what resources, to improve the current situation and achieve our desired objective What has been done in the language planning field

### 3.3. SHB'S MATRIX OR EXPLANATORY SCHEME

As we have seen in the previous two sections of this chapter, after much experimentation we decided to make use of six research parameters (the descriptive, kinetic, dynamic, prospective, contrastive and prescriptive fields of research, referred to in abbreviated form using the numbers 1 to 6), and to distinguish five dimensions along each of those parameters (language use, language competence, internal language structure, social matrix and language opinion-attitude-behaviours, referred to in abbreviated form by using the letters A to E). In total, then, a 30 cell matrix has been created, combining the six analytical parameters and the five dimensions. In the interests of clarity and easy reference, each cell has an alphanumeric code. The alphanumeric cell-codes take the parameter into account first, and then the dimension: for instance, 1B, 3A or 5E. The following tables present a summary of the thirty cells of the matrix, explanatory table or framework and show them in graphic form.

Table 12 shows the standardised names for dimensions, analytical parameters and cells. These terms have usually been formulated in a fairly compact manner, although the underlying conceptualisation is often complex. To facilitate interpretation, we also present a second table, table 13, which clarifies which question each analytical parameter and even each cell tries to answer.

Table 12: Names and codes of *dimensions, analytical parameters and cells*

		DIMENSIONS				
		<b>A: Language use</b>	<b>B: Language competence</b>	<b>C: Language structure</b>	<b>D: Societal features</b>	<b>E: Language opinions- attitudes- behaviours</b>
<b>ANALYTICAL PARAMETERS</b>	<b>1 Descriptive</b>	1A - Describing language use	1B - Describing language competence	1C - Describing language structure	1D - Describing societal features	1E - Describing language attitudes
	<b>2 Kinetic</b>	2A - Change in language use	2B - Change in language competence	2C - Change in language structure	2D - Change in societal features	2E - Change in language attitudes
	<b>3 Dynamic</b>	3A - Dynamics of change in language use	3B - Dynamics of change in language competence	3C - Dynamics of change in language structure	3D - Dynamics of change in societal features	3E - Dynamics of change in language attitudes
	<b>4 Prospective</b>	4A - Expected future language use	4B - Expected future language competence	4C - Expected future language structure	4D - Expected future societal features	4E - Expected future language attitudes
	<b>5 Contrastive</b>	5A - Language use contrasted with ideal	5B - Language competence contrasted with ideal	5C - Language structure contrasted with ideal	5D - Societal features contrasted with ideal	5E - Language attitudes contrasted with ideal
	<b>6 Prescriptive</b>	6A - Language status planning	6B - Language acquisition planning	6C - Language corpus planning	6D - Planning for societal features	6E - Planning for language attitudes

**Table 13: Fundamental questions answered by analytical parameters and cells**

		DIMENSIONS					
		<b>A: Language use</b>	<b>B: Language competence</b>	<b>C: Language structure</b>	<b>D: Societal features</b>	<b>E: Language opinions- attitudes- behaviours</b>	
ANALYTICAL PARAMETERS	1	What is the situation at a certain place, at a certain time?	With regard to language use	With regard to language competence	With regard to language structure	With regard to societal features	With regard to language opinions-attitudes-behaviours
	2	How have things evolved?	With regard to language use	With regard to language competence	With regard to language structure	With regard to societal features	With regard to language opinions-attitudes-behaviours
	3	Cause: Why is it happening, why has it happened? Effect: What is the consequence of each evolution on the second parameter in the other four dimensions? Covariation: Covariation, co-occurrences and other covariation phenomena	With regard to the evolution in language use	With regard to the evolution in language competence	With regard to the evolution in language structure	With regard to the evolution in societal features	With regard to the evolution in language opinions-attitudes-behaviours
	4	What type of future do we expect?	With regard to language use	With regard to language competence	With regard to language structure	With regard to societal features	With regard to language opinions-attitudes-behaviours
	5	Where are we headed (4) and where would we like to be headed? (Where would we like to be and where are we (1)?): <i>(dis)agreement between the two</i>	With regard to language use	With regard to language competence	With regard to language structure	With regard to societal features	With regard to language opinions-attitudes-behaviours
	6	What must be done, to protect what is right or correct what is wrong? What has been done?	With regard to language use	With regard to language competence	With regard to language structure	With regard to societal features	With regard to language opinions-attitudes-behaviours

### 3.3.1. The limits of the matrix

The objective of the SHB project is to clarify the social history of Basque, as its name indicates. To that end, it makes use of the tools provided by the sociology of language. So it is wholly immersed in the functioning and complexity of society. Reflecting that complexity conceptually and making it operative in an appropriate way is a defining characteristic of the project. More than one reason leads us to this complexity: the complexity naturally involved in examining reality, the complexity involved in analysing time and the complexity added by the project being a trail blazer in this discipline. Of course, we are not the first in the field of sociolinguistics to stress this complexity. Wodak (2000: 4), on presenting her *Discourse-Historical Approach*, specifically described this characteristic and underlined the need for a robust methodological basis to achieve the aim she had set herself: “In investigating complex social problems, we need a theoretical framework, which labels, systematizes and explains our ethnographic experiences which first form a kind of ‘symptomology’. Our task as critical scholars is, *inter alia*, to relate relevant ‘symptoms’ and ‘phenomena’ with each other and to offer theoretical explanations for such relationships”. Wodak (2000: 4-5) also believes that the gap between understanding and explaining must be bridged: “The difference between ‘*verstehen*’ (understand) and ‘*erklären*’ (explain) is important. In my opinion, we cannot aim at any kind of mono-causal explanation in the sense of the Natural Sciences. Social phenomena are much too complex and historically embedded to be explained in such uni-directional ways”, and stresses the need to contemplate multiple causes when understanding events: “Thus, I assume, that the complexities of modern societies can only be grasped by a model of multicausal, mutual influences between different groups of persons within a specific society” (2000: 7).

#### 3.3.1.1. Systemic complexity

The complexity paradigm has become indispensable in the second half of the 20th century to capture and study reality. Until then in Western research only the object was taken into account; now the subject has also become part of the research, a change formulated in the observer’s paradox. According to this paradox, the subject (observer) must be taken into account as part of the research. That being so, it is stressed that the way to apprehend reality is through representations: the only reality we can perceive is a represented one. As Schrödinger (1992 [1958]: 122) wrote, “Every man’s world picture is and always remains a construct of his mind and cannot be proved to have any other existence”. Researchers are subject to this rule, like all humans, although, as Jaspers (cited in Watzlawick 1978: 44) said, “To be sure, when doing scientific research there is in us the con-

stant impulse of looking at the world as if I, the recognizing agent, were not in it and with it; we would like to explore the world by excluding the fact that it is we who take cognizance of it". To put it another way, there is no objective reality (or, at least, humans cannot access or get close to that first-degree reality). So the world is something represented: as Abric (1994: 12) says "in principle, there is no *a priori* objective reality, (...) all reality is represented, in other words, appropriated by the individual or the group, reconstructed in their cognitive system, integrated in their value system depending on their history and the social and ideological context surrounding them".

After object and subject have become part of research, and the importance of representation has been stressed, the research field of sociology (in our case, of sociology of language) is wholly integrated into the complexity paradigm. We will not specifically deal with that complexity, as it is not, in fact, a specific feature of our project, being rather an indispensable component in any research into reality. Representations are fundamental when researching the configuration of society, its evolution and what are assumed to be the underlying reasons. As Guimelli (1994: 106) writes, "It is not the objective reality of the situation which allows us (...) to understand (social facts), but, rather, the way in which groups appropriate it". Moscovici, too, has underlined the importance of complexity in research methodology: he contrasts two research methods in his introduction to social psychology. His objective is to open up a new phase in social psychology, breaking with the previous, out-of-date approaches (Moscovici 1976: 5). He recommends side-lining the uniform social psychology which examines society from the perspective of the majority, of those who dominate, and moving towards a bolder, more critical form of psychology. In other words, changing to a perspective and a paradigm that recognises the dynamic, changeable nature of reality (Moscovici 1976: 6). Here is how Moscovici (1976: 6) distinguishes these models (the first, traditional, model he calls "functionalist", and the second, the one he wants to promote, "genetic"):

In order to highlight the differences between the functionalist and the genetic models, we could say that one views the social system and the environment as *givens*, while the other views them as *products*; one stresses the *dependence* of individuals on the group and their social *reaction* to it, while the other stresses the *interdependence* between individuals and the group and the social *interaction* in the group. Finally, for the one, the people and the group seek and tend to *adapt*, whereas, for the other, their endeavour is to *grow*, that is, they seek and tend to develop the capacity to assimilate selectively and to create new ways of thinking and doing, to redefine and reconstitute their boundaries by combining old and new, internal and external, to modify the environment and expand the network of social relations, and to participate in the creation of new groups and subgroups.

Research has typically been an initiative that attempts to explain reality using words. To an extent, this attempt, however, seems to be in vain, in that reality is not unique or lineal while language, on the other hand, is and, therefore, cannot reflect reality in its entirety. To quote Glasersfeld (1984: 37), “Language inexorably forces us to present everything as a sequence. The three sections of this essay, thus, will have to be read one after the other, but inevitable succession should not be understood as a logically necessary order”.

### 3.3.1.2. *The complexity paradigm and the SHB matrix*

A desire to analyse and describe sociolinguistic and historical reality involves plunging into the complexity paradigm. In order to approach the object we are examining most appropriately, reality has to be grasped in all its complexity. Morin (2005: 21), for instance, has compared the complexity with a piece of tapestry: “What is complexity? Firstly, complexity is a tissue (complexus: that which is woven together) of heterogeneous elements which are inseparably associated: it is paradoxically one and multiple at the same time”. To make a comparison, Morin (2005: 113) gives contemporary tapestry as an example: it is made up of threads of many different types and colours. To get to know that tapestry entirely and in depth, it is not enough for us to study the distinguishing features of each thread. Being familiar with each thread is not enough to become acquainted with the tissue which makes up the new reality nor does it give us information about the shape of the tapestry or about its entire composition. So the simplification inevitably implicit in each methodology must be taken into account: they are tools for approaching reality, but not reality in itself. Even if each thread is thoroughly examined, attention must be paid to the form of the entire tapestry, too. As Morin (1973: 229) says, “No theory, even a scientific one, can get to the bottom of reality and enclose its object in its paradigms”.

In the social history of Basque, too, each analytical parameter and dimension can be examined separately, to obtain a superficial analysis of each thread of the sociolinguistic situation. However, an all-encompassing perspective has to be pieced together subsequently, taking all the dimensions and analytical parameters together into account. Normally, something of greater depth and breadth than the sum of the dimensions and analytical parameters will be brought into being via this second phase. After presenting *descriptive sociology of language* and *dynamic sociology of language*, Fishman (1972a: 3) remarked on something similar: “These two subdivisions taken together, i.e. descriptive sociology of language plus dynamic sociology of language constitute the sociology of language, a whole which is greater than the mere sum of its parts”. This kind of phenomenon is common in science; it is called emergence and is also linked to complexity. In

recent years, research about language has been using statistical techniques that give rise to these kinds of parameters (Solé, Corominas, Fortuny, 2013).

SHB's methodological model and the combination table, or matrix, attempts to take all of these paradigms into account. The objective of the combination table is to serve as a tool for deconstructing the historical reality of society. To analyse reality, it seems essential to start by simplifying (analysing each thread in itself). The combination table offers an excellent opportunity to do just that by defining five dimensions and six analytical parameters. Furthermore, the matrix and the computer database created to work with it are useful for classifying and saving the deconstructed material. When all the threads have been examined, the analysis of complexity and the whole begins. In other words, after deconstructing, reconstruction work is required to establish the whole once again. And that is the researcher's task. So there are four main phases: 1) gathering information about a situation (reality); 2) differentiating and classifying that information (deconstructing); 3) analysing the information classified in terms of the sociology of language (reconstruction of each thread/part); 4) recreating the whole (reconstruction by the researcher).

So the matrix has a double function: for one thing, it is a tool for classifying information provided by witnesses and reporters for each period; for another, it serves to classify all that information in terms of present-day scientific parameters and, carrying on from there, to carry out a basic analysis. Let us see how what we say can be applied, with the help of an example. Jimeno Jurio (2004: 89), in his publication on the historical decline of Basque in Navarre, quotes the following passage found in the Pamplona/Iruñea diocesan archive (c/262, nº 2, f. 23):

... the parish congregation, or most of it, is made up of livestock farmers and herders and they usually and habitually take their animals down to the Ribera [outside the traditional Basque speaking area, in the very south of Navarre] and other parts, and do not return to their homes until the end of June, and because all or most of them only speak Basque, they cease to make their confessions and take communion until they go back home, and then they fulfil the Church's precept in their parishes.

The passage reflects answers given by some parish priests to the diocesan prosecutor. Leaving aside the question of whether the information is reliable, it contains very valuable information for the SHB project: the shepherds taking part in the transhumance were monolingual Basque speakers. That information has to be classified in SHB's matrix. It must be included in the language competence dimension: 1B (descriptive parameter + language competence) and in the language use section: 1A (descriptive parameter + language use). In the same way, an initial classification can be carried out thanks to the matrix (and, in

particular, its subsections). Classifying the information in cells 1A and 1B is the first step in analytical classification, then: when describing any sociolinguistic situation, one basic set of distinctions is that of knowledge, use and attitude. In addition, the influence of transhumance and mobility in the survival of minority languages has often appeared in sociolinguistic research. Hence, the topic of transhumance has been included in its own right in one of the cells of the taxonomy within the terminology-chain ‘location/ecological demarcation/mobile lifestyle/transhumance’ discussed in 2.4.2. So when researchers attempt to describe and analyse reality, they will be able to use the conceptual framework to find the data and will receive the data once it has passed through the initial methodological filter.

## 4. DESCRIPTIVE PARAMETER

In chapters 4 to 9, the nature and internal structure of each cell of the combination table which constitutes the general historical-sociolinguistic structure of the taxonomy we propose will be explained. These explanations will be given cell by cell, going from top to bottom, and, within each analytical parameter, examining the dimensions from left to right: in other words, from 1A to 6E. To follow this explanation concept by concept and cell by cell with greater ease, we recommend the reader takes a look at the full taxonomy listed at the end of the book.

Before giving this cell by cell explanation, however, a couple of points must be made, one about terminology repetition and the other about the *inference* label.

Firstly, as the reader will realise very quickly, the internal configuration of the cells on the same parameter or dimension is often repeated, either partially or, in a few rare cases, entirely. In the same way, the terminology itself is often repeated, literally or (depending on the topic of the cell in question) with appropriate changes. Those repetitions are deliberate and fulfil two functions: to make it easier to master the whole scheme and to offer a more explicit signal of the connections within parameters and within dimensions. There is no risk of confusion as even identical terms belong to different terminological chains which always begin with a mention of the corresponding cell code.

Table 14 provides a summary of the five dimensions for the first analytical parameter.

Table 14: *Cells on the descriptive parameter*

Code	Standardised term
1A	1A - Describing language use
1B	1B - Describing language competence
1C	1C - Describing language structure
1D	1D - Describing societal features
1E	1E - Describing language attitudes

#### 4.1. 1A - DESCRIBING LANGUAGE USE

What is the social use of language(s), at given times and in given places, or in general? To put it another way, the labels in cell 1A respond to this question: what are things like at a given place and at a given moment in time concerning the use of language(s)? Before specifying how SHB has organized this cell, let us examine how others have.

There is a wealth of bibliography on this topic worldwide. One of the main concerns of the sociology of language is to describe language use at specific moments; as we have already mentioned, Fishman (1972a: 3) states that one of the objectives of the sociology of language “is concerned with describing the generally accepted social organization of language usage within a speech community (...). This part of the sociology of language – *descriptive sociology of language* – seeks to answer the question ‘*who speaks (or writes) what language (or what language variety) to whom and when and to what end*’” (emphasis added). This is precisely the question that this dimension wants to answer.

Rubin, for her part, mentions several variables in order to understand the choice of language. Therefore, when describing language use, these are variables that we may need to take into account. Most of them are included in our taxonomy and we have seen them in the second chapter of this book. Rubin (1968: 514-515) states:

The literature discussed above has suggested several variables which are operable in linguistic choice. These may be grouped as follows:

1. The relationship between two or more persons involved in conversation. This would be considered from the speaker’s point of view and his estimate of the relationship. In this group, one could include Brown and Ford’s intimacy and status variables. I would add that sex might be a separate variable. Regardless of intimacy or status, members of the opposite sex might with each other use forms different from those used with members of the same sex.
2. The attributes of either the speaker or the addressee. Here one might list class level and origin. (“Origin” specifies the area a person comes from – specifically, rural, town or urban.) Even though great intimacy exists, certain classes might prefer different reciprocal forms.
3. The aspects of the situation. Here one could include Stewart’s formality-informality and public-private variables. Another variable might be the location of the situation, i.e. rural, town or urban. A final variable might be the degree of seriousness of the situation. Many informal situations may obviously be quite serious.

To a large extent, Rubin's distinguishing characteristics concord with the variables defined by Fishman (1965b), when explaining how multilingual sociolinguistic situations should be described. After confirming that choice of language in multilingual situations follows specific norms, Fishman describes the factors which influence it. Fishman (1965b: 67-68) writes: "(...) habitual language choice is far from being a random matter of momentary inclination (...) only *one* of the theoretically co-available languages *will* be chosen by particular classes of *interlocutors* on particular *occasions*". Such factors are, indeed, what must be studied to describe specific linguistic situations where more than one language is involved. Fishman specifies the following specific variables:

- a) Group membership (Fishman 1965b: 68) includes both objective physiological membership (age, gender, race, religion and so on) and/or subjective membership. Of subjective membership Fishman (1965b: 69) says that: "(...) the very existence of certain reference groups (e.g. club member) seems to depend largely on location, setting or other environmental factors (...), rather than on group-consciousness or group-experience as such".
- b) Situation has five main components (Fishman 1965b: 69): "Ervin (7) observes that various situations (settings) may be restricted with respect to the *participants* who may be present, the *physical setting*, the *topics* and *functions* of discourse and the *style* employed".

To describe multilingual sociolinguistic situations, Fishman drew up dominance configuration tables. These tables will be explained in section 4.1.4.

This cell, then, is concerned with measuring the social use of language (and, when appropriate, languages) in specific places and at specific times. When one turns to the social history of Basque, and using data from this cell, the first aim is to answer the question: at given times, in given places, what has the use of Basque and languages other than Basque been like in the principal domains and in the (oral and written) production of local communities, in their relationship networks?

In short, all such information needs to be recorded in cell 1A in a structured manner. This, in our opinion, makes it necessary to take at least the following facets of the data into account: a) level of data precision (to what extent have we gathered data corresponding to all the parameters identified by sociolinguists); b) data generalisation strength (in other words, to what extent does the case we are examining concern a unique individual or reflect the usage of a whole collectivity); c) the details which must be provided on the degree of reliability of the data; d) the degree of stability of the situation being described, when recording general

data about a group; e) the reasons given to explain each situation; and, lastly, f) as with all other dimensions, the degree to which data is explicit.

*a) Data precision*

Depending on the quantity and wealth of data provided by the sources we need to distinguish between three possible approaches:

1. In the simplest cases, dichotomies such as *yes/no* (in other words, *Basque / non-Basque*) have to be used: for example, according to many documents, during the second half of the 18<sup>th</sup>-century farmers in Donostia living outside the city walls spoke only Basque. These dichotomic formulations are simple, and they do not provide the options for precision the approach we examine next does. However, they should not be written off. As Fishman (1991: 53-54) puts it, “Minimal solution to the problem of estimation [of language use:] to rate whether Xish or Yish ‘is the most frequently used language’. [...] [A] grid [...] provides a structured and uniform approach for collecting such opinion from various specialists and for comparing such opinion from one specialist to the other and from one time to the next”.

2. In the most sophisticated cases, tables (in the terminology of SHB, for cell 1A: *language use related dominance configuration tables*) combining sociology of language concepts such as media, overtness, domain (of language use) and role relation can be used, depending on the degree of precision of information about language use both from explicit sources and from inferences teased out from more implicit content. In other words, language use at a given place and time can be specified by media (listening, speaking, reading or writing), by overtness (depending on whether communication is for oneself, a known person or a group of unknown people etc.), by domain (at home, in the neighbourhood or village friendship group, at work, in religious contexts etc.) and, in each domain, by role relationships (in the family, for instance, between husband and wife, or parents with children, or siblings amongst themselves, etc.).

Domains have no lasting “intrinsic” structure: the structural model to be applied may change considerably from one place to another and, particularly, from one century to another. Because of that, the structural model chosen needs to be valid for fairly long periods of time. Table 15 provides an initial example.

**Table 15: Example of a language use related dominance configuration table**

Media	Domain	Role relationships	Most used language
Speaking	Family	Husband-wife Parent-child Grandparent-grandchild Siblings (at home) Others (parents' generation) Others (children's generation)	
	Neighbourhood	Friends Acquaintances	
	Sports / leisure	Coach-player Player-player	
	Education	Pupil-teacher Pupil-pupil	
	Work	Employer-employee	
	Government	Officer (Civil Servant)-citizen	
	Religion	Praying (at home, in church etc.) Hearing Mass Preaching and listening to sermons Promoting Christian teaching [Sunday school classes]	
	Village life	Public activities Market-day buying and selling	
	Others		

3. Lastly, when sophisticated models cannot be applied, compromise descriptive tools have to be used. Fishman (1991: 49-52) makes the following recommendation: "Language use is somewhat easier to evaluate than attitude and language competence; (...) [M]uch of it is overt and available for others to see and hear. However, its accurate depiction is beset by various difficulties (...). The greatest of these difficulties is finding the proper unit of performance that is to be counted. (...) The usual escape hatch in the rating of observable behaviours, particularly for large-scale studies (...) is undertaken in terms of ratings of 'relative frequency clusters'. Such ratings are technically known as 'Likert-type' ratings

and utilize such designations as ‘always’, ‘frequently’, ‘sometimes’, ‘rarely’ and ‘never’. (...) [W]here greater rating or self-rating accuracy is either unattainable or attainable only at prohibitive costs (...), the response categories used in language surveys are most commonly left undefined, i.e. they are presented as intuitively understandable and interpretable ‘relative frequency clusters’. (...) [T]he responses on self-report Likert-type instruments are significantly related to independently obtained daily behavioural records of a more precise type”.

SHB uses all three systems mentioned above. To reflect the situation of the use of Basque and, in general, of other local languages the labels *in general*, *in an undetermined manner* and *language use related dominance configuration table* and other sets of labels (those grouped under *socio-functional position*, *language behaviour*) must be used, as we will soon see.

#### *b) Data generalisation strength*

Does the information about use which we have documented concern a single person, or does it describe many people’s behaviour? If the data relates to a single person, to what extent is that individual description helpful when defining the behaviour of others? Has the author not cited it as atypical behaviour? Depending on the answer to these questions, data collected from different sources do not necessarily have the same validity in terms of making generalisations. As a result, we must make a fundamental distinction between the three models just mentioned: the *language use related dominance configuration table* is of use for defining language use in a network of relationships or in the whole speech community. If such a table is based on a single person’s experiences or explanations, we will be assuming that that individual experience reflects that of a whole group of people in some way. Generalisations of that sort have often proved to be correct.

#### *c) Data reliability*

Of course, not all data about usage has the same degree of reliability: there is a long *continuum* stretching from a simple “apparently” to a richly documented piece of research. Data from different sources cannot be taken to have the same value.

#### *d) Degree of stability of the situation*

If the situation of use the quotation describes refers to a group, is that situation stable? Or is it conflicted and unlikely to endure? When we are provided with such information, we have the option of two second-level labels to store

it appropriately: *situation stable (language maintenance prevails)* and *situation unstable (some sort of language shift appears)*. As the appropriate use of these two concepts may prove problematic, an explanation of each with detailed justification will be offered in 4.1.2. and 4.1.3 respectively.

*e) Reasons given to explain a situation*

When describing a situation of language use, authors of quotations themselves often explain why the situation is as it is. Such explanations may or may not provide the true cause, but at the very least they need to be recorded; to that end, the label *reason for 1A* must be used, as explained in 4.1.5.

*f) Degree of data explicitness*

There is considerable variation between one piece of data and another: some quotes are explicit, while others are not. When we see that useful information can be derived from a quotation even though it is not stated word for word, we use the *inference* label.

It looks necessary to bear in mind these different facets of the data when dealing with sociolinguistic information. In parallel, each cell has its development in our taxonomy, in the case of language use (1A), we make use of six second-level labels under the heading *1A – Describing language use: general, undetermined; language use without language contact; language use with some kind of language contact; language use related dominance configuration table; reason for 1A and inference*, some with corresponding third level labels. To give a rounded picture, two other groups of labels should also be used: those expressing *socio-functional position* and *language behaviour*. Let us, then, examine one-by-one the basis for, and use of, the labels chosen for our taxonomy.

#### 4.1.1. **General, undetermined (along with language behaviour)**

The term *general, undetermined* is fundamental in this cell. It is used when none of the more specific labels in this cell are appropriate to the language use described in the quotation. As with all other quotes, after using the label *General, undetermined*, *socio-functional position* and *language behaviour* also have to be defined if at all possible.

The use of the first group of labels, that of *socio-functional position*, we have already explained: see section 2.5. Terms from the *domain* set as well as the label *role relationship* may also prove to be useful.

The second group of labels, *language behaviour*, however, requires specific explanation. It involves six different parameters, each embedded in the previous one with its own set of labels (see table 16). The *language behaviour* label can be used in any cell of our taxonomy; it has the same status as *socio-functional position*: it stands outside the cells of our dimensions and analytical parameters so it can be used in conjunction with any of the cells of our model, but it is particularly useful for cell 1A.

Table 16: **Basic organization of *language behaviour***

Label level	Parameter name	Meaning
1	Language behaviour	Group of terms which includes media, overtness, style, dominant language and language variety for each speech act.
2	Media	What is the speaker's activity: listening, speaking, writing or reading?
3	Overtness	To whom is the communication addressed: to oneself, to a known person, to a group of unknown people?
4	Style	What is the style of communication? Depending on the degree of personal closeness or distance suggested by the expression considered, where is the style situated on the <i>continuum</i> between the intimate and the formal?
5	Dominant language	What is the dominant language of communication in the physical and socio-functional space under study? Which language is most used, objectively?
6	Language variety	In the specific communication we are labelling, which language or dialect has been used? It does not necessarily have to coincide with the (main) language(-variety) used in the act of communication under consideration.

The next step is to examine in each level of labelling mentioned the specific labels which can be used.

The first parameter, *language behaviour*, is the root of the five parameters which appear on the following levels.

In the second parameter, *media*, there are seven terms: *general*, *undetermined*; *listening*; *speaking*; *reading*; *writing*; *translation* and *cryptolanguage*. The last two terms, *translation* and *cryptolanguage*, have been included because they were once (and, to an extent, still are) helpful for describing language behaviour in Basque society, even though they are normally not mentioned specifically in academic formulations of *language behaviour*. In the first case, the term is

necessary because of the close contact Basque has had with some other languages over the centuries, contact which has created the need for simultaneous, consecutive and whispered interpreting in oral situations and, in written language, for translations in separate or parallel texts. Leizarraga's work (Leizarraga 1990 [1571]), for instance, which has been exceptionally important in the social history of Basque, largely consists of translations. Bible translations have held similarly important roles in many European languages. Concerning cryptolanguage, Basque has sometimes been used by two people in front of a third, non-Basque speaker to hide what was being communicated from that third party: there are, for example, hand-written communications between Basques in commercial and official settings. They are mostly written in Spanish, but - perhaps because of fear of being reported - some parts are also written in Basque: see also, for instance, the Basque words, expressions and passages which Larramendi included in his Spanish texts, as well as the letters written by Friar Domingo de Lardizabal in 1655 from Palestine (Arce 1967).

Leaving aside the special cases of *translation* and *cryptolanguage*, the *media* parameter has four main subsections (Fishman 1991: 43): *listening*, *speaking*, *reading* and *writing*. A fifth has also been added for cases where there is a lack of precision: *general, undetermined*.

In the third parameter, *overtness*, the question being answered is who produces the message and for whom. The following distinctions may be needed: *listening to known sender* and *to unknown sender* under the heading of *listening*; *speaking for known receiver*; *for unknown receiver* and *inner speech* under *speaking*; *reading for oneself* and *reading aloud* under *reading*; and, lastly, *writing for oneself*, *for known receiver* and *for unknown receiver* under *writing*.

In the fourth parameter, *style*, the degree of formality of language use is clarified: we have already seen (3.1.1.) how various writers have split up the *continuum* which goes between formality and intimacy. SHB, as we have said above, has specified three styles: *formal*, *informal* and *intimate*. Style, register and genre are three important concepts that we may deal with in historical sociolinguistics; they are linked to situational characteristics that Conrad and Biber (2009) studied using seven components: (a) participants, (b) relations among participants, (c) channel, (d) production circumstances; real time/planned/scripted/revised and edited, (e) setting, (f) communicative purposes, and (g) topic. Authors frequently use the terms style and register indiscriminately; in our taxonomy, we use the term *style* which is more usual in Fishman's writings, but it could be interesting in the future to include in this sociolinguistic taxonomy a distinction between these three concepts that could be included in the hyperonym, *text-type*: *register* is a language variety viewed with respect to its context of use (Biber & Finegan

1994: 3), *genre* is linked to the purpose of the text and its content (narrative and so on) and *style* to the specific way an author, a social group and so on express themselves; Coupland defines it as “how speakers draw on their social beliefs and understandings of language differences in order to make social meaning in their talk; an active process of meaning-making (Coupland 2014: 292). The distinction between these different concepts is not easy to make as they are not used in the same way by different authors in sociolinguistics (Ferguson 1994: 15, Lee 2001, Atkinson & Biber 1994: 351); this is just a proposal among other possible options for future developments of our taxonomy. Lee (2001) tried to clarify the concepts and much information can also be found in Biber and Finegan’s book *Sociolinguistic Perspectives on Register* (1994) and Biber & Conrad (2009) *Register, Genre and Style*. For Lee (2001: 38), following Biber (1988), *genre* is linked to external criteria and *text type* is linked to internal (linguistic) criteria. *Style* is essentially linked to the individual’s use of language (Lee 2001: 45), and for him, *register* and *genre* “are in essence two different ways of looking at the same object” (2001: 46). In Biber and Finegan (1994: 4) the definition of *register* is much looser: “broadly conceived, a register is a language variety viewed with respect to its context of use” and for them, the terms *register*, *genre*, *text type*, and *style* have been used to refer to language varieties associated with situational uses of language. For these authors, Hymes’s *verbal repertoire* would also be a synonym of *register variation* (1994: 7). In Biber and Conrad (2009: 31) the definition of *register* would be “a language variety associated with both a particular situation of use and with pervasive linguistic features that serve important functions within that situation of use”. These terms are to be distinguished from the term *dialect* which deals with language varieties associated with groups of users (as determined by geographic region, education, social class, sex, and so on) (Biber & Finegan 1994: 7, Ferguson 1994: 16, for definitions of dialect, register and genre see Ferguson 1994: 18-19, 20 and 21, Biber & Conrad 2009: 11).

The second parameter (media) and the fourth (style) may be connected. Concerning media, there is a continuum between the written and spoken codes. Martineau (2012) examined precisely this topic by comparing the corpuses used by historical sociolinguistics and present-day corpuses, examining the connections between the written and the oral. Following the perspective of Koch and Oesterreicher, Martineau (2012: 112) believes there is a real dichotomy between the phonic and written codes, at the same time as a communicative *continuum* between oral and written language. Moreover, orality is present in certain types of written text, for instance in plays and family letters. In her article, she compares corpuses based on plays, tales and letters, concluding that standard language and literary rules exert greater influence on the corpus based on plays than on the other two. Hemphill (2011: 70-82) stresses this question while giving it a different

focus. When examining orality and literacy in sociolinguistics, she points out that genres can differ markedly from each other along many dimensions of analysis, and written genres may share key features with genres of oral discourse.

The fifth parameter is for signalling the *dominant language*: this can also be called the *dominance configuration*. Both Weinreich and Fishman have used this term, although in somewhat different ways. Weinreich defines *dominance configuration* as a personal attribute of bilingual speakers, whereas Fishman sees it as a characteristic of groups of speakers or speech communities. The two points of view have this in common: where there are two languages present in an individual speaker's or a speech community's language behaviour, this concept signals which of the two is the dominant one, defining certain parameters to that end.

To classify the different uses of languages, SHB has anticipated five basic possibilities: *always or almost always in Basque*, *more frequently in Basque*, *equally in both*, *more frequently in language other than Basque* and *always or almost always in language other than Basque*.

In the sixth parameter, finally, the *language variety* used must be determined. SHB has created a broad set of terms for this purpose, opening up many different levels of possibilities in terms of precision. With regard to Basque, the following language varieties or levels of precision are taken into account: *Basque in general*; *det-Basque*; *dot-Basque*; *dut-Basque* (the three terms refer to the major dialect distinctions); *standard Basque*; with regard to languages other than Basque: *language other than Basque in general*; *Spanish*; *French*; *Latin*; *Gascon*; *Navarre-Aragonese* and *other non-Basque language*. Even though the meanings of the other terms are fairly clear, the last term, *other non-Basque language*, does call for explanation: it is reserved for languages not mentioned in the preceding list: for example, other minor Romance languages, Arabic, languages of the Jews, of Roma and so on, whose presence in the Basque Country has been limited in comparison to the languages mentioned by name.

#### 4.1.2. Describing language use without language contact

If we analyse language use from the point of view of the sociology of language, we can highlight two main situations. On the one hand, one in which only one language is present in the community, that is to say, that there is no language contact. In this case, tensions or changes only occur within the only language used by the speakers. This case is taken into account under the label "LU without language contact". A priori this type of situation is stable until contact with another language is initiated, extralinguistic factors cause internal tensions in the speech community, or intragroup intercomprehension is in decline following dif-

ferent dialectological evolutions. On the other hand, we can draw attention to more complex situations in which there is a certain type of language contact. In the case of SHB, contact between Basque and another language. This second case is dealt with in the following cell.

#### 4.1.3. Describing language use with some kind of language contact

This cell is used to describe situations in which there is language contact. This sort of social situation is usually more complex to describe; it can be stable or unstable, with or without patent or operative conflict. Diglossia is also a concept usually linked to stable situations of language contact, following Ferguson (1959) and Fishman (1967), but as in some sociolinguistic literature and for some authors diglossia can also be unstable, particularly in the case of extended diglossia, we have not included the concept *diglossia* as a sublabel of the cell linked to stable situations. With these considerations in mind, we have created four subcells for the cell about description of language use with some kind of language contact: *general, undetermined*; *situation stable (language maintenance prevails)*; *situation unstable (some sort of language shift appears)*; *diglossia*. Each of the main three situations has been developed as shown in table 17.

Table 17: Describing language use with some kind of language contact

Describing language use with some kind of language contact	General, undetermined	
	Situation stable (language maintenance prevails)	Without (patent or operative) conflict
		With (patent or operative) conflict
	Situation unstable (some sort of language shift appears)	With (patent or operative) conflict
		Without (patent or operative) conflict
	Diglossia	Present
		Absent

Most of the situations cited in the table above are well known in the field of the sociology of language and do not need further explanation, but the terms linked to the extent of stability, *diglossia* and *language conflict*, may do so.

#### 4.1.3.1. *Extent of stability of language contact situation*

Situations of language contact, both from a language-internal point of view, or as a language dominance configuration in terms of societal use, can remain stable during decades and generations or can be unstable or evolve towards instability, with some sort of language shift and changes in the language dominance configuration or in the language structure appearing (Braunmüller, Höder, Kühl: 2014). Stable situations, historically in the Basque country and in many other geo-linguistic areas, are usually linked to diglossic situations in the context of a dichotomic use of language, by using one language for everyday life and another for reading and writing.

The 1A cell is about use of language at a particular historical moment, but it is to be noted that even from a synchronic point of view, the situation can be defined as stable or unstable without comparing one historical moment to another. Furthermore, even if stability and instability can be linked to the comparison of two different historical moments, the contrast is not limited to the time parameter. Societal variables such as social stratification, social network, gender and the different domains of language use among others are also to be taken into account when determining whether a given sociolinguistic situation is stable or unstable across all those variables. In fact, the sociolinguistic situation can be analysed between two points of view: it can be stable or unstable, homogeneous or not homogeneous, over time or over societal parameters. There can be homogeneity in language uses across all those societal parameters, or there can be differences between those variables; those differences can remain stable or be unstable, as well. Normally the differences and the stability and instability are not random, and if they are, they create insecurity for the speaker.

#### 4.1.3.2. *Diglossia*

Diglossia is one of the principal concepts of the sociology of language. When two or more languages (or varieties of the same language) are present in a society or speech community, when each language has its own domain(s) within that speech community, and when that bi- or multilingual configuration is intergenerationally stable (for at least three generations), the speech community in question is said to exhibit diglossia, which in the words of Fishman (1987: 252) is “widespread and stable within-group bilingualism, such that the languages utilized are, on the one hand, consensually functionally differentiated and, on the other hand, consensually accepted as culturally legitimate”. We are not going to give any further explanations about the classic model of diglossia, as the topic is sufficiently covered in the international bibliography.

SHB specifies the presence or absence of diglossia at given times and places for Basque and other local languages according to Fishman's definition (Fishman *et al.* 1976: 286-288; Fishman 1972a: 91-106), using the *diglossia* label. When the quote clarifies whether diglossia existed or not in a given situation, the labels *present* or *absent* can be used. The historian Lacarra (1957: 9) gave a clear example of functional separation of languages in the Basque Country: "But when studying the Middle Ages I have had to use numerous documents from the tenth to the thirteenth centuries which are full of Basquisms and which, in some cases, were written by people who spoke and thought in Basque even though they were writing in another language. On writing the history of the medieval period in the Basque Country, we are continually aware that we are reconstructing the past of a people who write in a language that is not the one it speaks, and whose language leaks out into the documents". This situation is not specific to Basque; such situations are common in international sociolinguistic history and languages like Basque have been called *invisible languages* in the field of historical sociolinguistics (Havinga & Langer 2015a). Havinga and Langer (2015b: 1) for instance "applies the terms *invisible languages* to refer to languages not used in writing or formal discourse and *invisibilisation* to refer to processes aimed at excluding particular languages from written or formal discourse".

It is to be noted that in the Basque case, however, there is a substantial interlinguistic distance between Basque and the languages it has been in contact with. Concepts such as *diaglossia*, which are being used successfully in historical sociolinguistics, with great debates about whether this kind of situation precedes or follows a situation of diglossia (Rutten 2019: 34; 48-50), would have a central place in a general taxonomy of historical sociolinguistics. *Diaglossia* is a situation more complex than diglossia which is characterised by a ubiquity of intermediate variants between the base dialect and the standard in the sociolinguistic space (Rutten 2019: 34). Because of the scarcity of sources in Basque, such a degree of precision is difficult to put into practice in the Basque area; even so, this kind of information, which we consider more linguocentric in nature, can be included in the linguistic dimension (dimension C in our taxonomy).

#### 4.1.3.3. *Language conflict*

Where more than one language is present in a single area, the relationship between those languages can be seen as a conflict rather than *diglossia* or contact. For many authors, there is a close link between language contact and language conflict, as Darquennes quotes (2015: 9): "Given the close connection between (research on) language contact and (research on) language conflict (cf. Nelde 1997), it is hardly surprising that the main areas of focus of research on

language conflict closely resemble those of research on language contact”. The term ‘language conflict’ or ‘linguistic strife’ has been a familiar one in Basque society for the last forty years thanks to Catalan sociolinguistics. Applying this perspective to a quotation, does it examine the situation of use of the two languages present from a language conflict perspective? As in the previous case, as well as mentioning conflict, perhaps the precise situation is described: conflict is judged to be *present* or *absent* in the quotation itself in a situation that can be stable or unstable. To propose a model as inclusive as possible and without judgement or a priori we did not want to enter into the debate to determine whether language contact automatically means conflict (see for example Nelde 1987 with the suggestive article “Language contact means language conflict” or the state of the art on questions of language conflict by Darquennes 2015), so we have included several options (with or without conflict) to describe a sociolinguistic situation as shown in table 17. Let us examine, then, the conceptualisation behind these terms.

It should be taken into account that the mention will often also be linked to the fifth dimension: when authors state that “diglossia is unfair”, they are often implying that the dominant situation in the social sphere (or in the process of becoming so) is not to their liking.

So there are four types of quotation about diglossia and language conflict:

1. Quotations about true diglossia (whether mentioning the word *diglossia* or not).
2. Quotations about conflict (which do not mention the word *diglossia*).
3. Quotations that mention *diglossia* but which in fact are about conflict.
4. Quotations that mention *diglossia*, but where it is not clear whether they are really about diglossia or conflict.

The concept of language conflict is closely connected with past attempts in the so-called Catalan countries at systematizing the concept of diglossia. Catalan sociolinguists have explicitly linked the two concepts. In SHB, on the other hand, we have preferred to keep to the original conceptualisation, believing that diglossia and language conflict should not be seen as synonymous (Zalbide 2011a: 66), even though they may be connected in some cases (Zalbide 2011a: 60-61):

We believe it would be hard to say that Catalan sociolinguistics is wrong about that. From a long-term point of view, not everything is a calm, peaceful atmosphere. Catalan sociolinguists have been quite clear in describing and clarifying the final result of the dynamic parameter. Coexistence is not always peaceful, and disputes

and fights, conflict and struggle are not infrequently predominant. In order to know when the situation is peaceful and when conflicted, the kinetic and dynamic parameters must be taken into account. Without that, the concept of *diglossia* seems weak to them. Many have considered that to be one of the prime contributions of Catalan sociolinguistics. Kremnitz (1981: 65) puts it this way: “by abandoning the purely descriptive and static terminology offered by North American sociolinguistics, by taking into account the internal tensions which hide behind the words, the analysis becomes both more profound and more committed”. Similarly, Boyer (1986: 23) writes: “It is beyond question that the introduction of the concept of diglossia in new contexts, its use and integration in a metalinguistic whole forged in contact with the ‘ground’ has considerably affected its theoretical status. In the face of a static functional representation (Ferguson, Fishman,...), of an idea of a more or less complementary distribution of the functions of two varieties of the same language or of two different languages within a community, of a stable distribution (even if it may be asymmetrical), CSL [Catalan sociolinguistics] and subsequently OSL [Occitan sociolinguistics] are going to contribute a much more dynamic representation: from a neutral sociolinguistic polarity, one shift to a problematic polarity between a *dominant language* and a *dominated language*. There is instability, dissymmetry. There is *conflict* (..)”.

According to this Catalan model, “language conflict has only two possible outcomes: the contextually weaker language is either substituted, or normalized. Hence, the widespread individual bilingualism resulting from language conflict is transitional, as is diglossia or societal bilingualism” (Zalbide 2011a: 62-63).

That conflict may be patent, explicit, conscious or latent, concealed, unconscious according to the Catalan model. Ruiz i San Pascual *et al.* (2001: 76-77) summarise language conflict as follows: “[Language conflict is] the struggle between two **speech communities** whose objective is to occupy **domains of use**. From the conflictual point of view, discussion of language contact and struggle is much the same because two languages cannot live together in harmony. Phenomena of coercion whereby one language dominates another always appear, as a result of the power exercised by the social groups which maintain or reject those languages and which use language behaviour as a **symbol** of a specific political project or **ideology** (Calsamiglia, 1980). **Ninyoles** (1975) used and popularised the term *language conflict* –previously used by **Aracil** (1965)– when researching the evolution of Valencian sociolinguistics. Conflict, according to Ninyoles, is almost continual where there is language contact. In the same way, this author distinguishes hidden conflict (which can create social unease even though there is no awareness of it) and visible conflict (when there is awareness of it and speakers name it as such)”.

SHB’s objective, in these matters, is neither to confirm nor to deny the conflict model. It does not intend even to enter that theoretical discussion: our only

objective is to put forward a methodology for examining and classifying data. That is why one label has been created in the SHB model for diglossia, taking diglossia in its original academic meaning, while language conflict is included in the description of language use in a situation of language contact, both stable and unstable. As a result, some quotations may be included under both headings. We foresee using the language conflict label in two main cases: firstly, for marking up quotations that describe conflicted sociolinguistic situations, in other words, where quotations mention sociolinguistic situations which turn out to be problematic in some way. Secondly, for marking cases where authors analyse the situation in the Basque Country as conflicted (or not). In the latter case, those authors will often mention diglossia, as there has been a considerable tendency in the Basque Country to treat diglossia and language conflict as synonyms. However, one should bear in mind that this type of quotation is only to be found in the last quarter of the 20th century and, so, those descriptions will only appear towards the end of the period under examination. The debates about diglossia and conflict recall the debates about language contact and language conflict. To a large extent, the difference seems to be a difference of point of view. In the Basque Country, even if the conflict was the main point of view about the situations of social bilingualism in recent years, discourses about contact are common nowadays (Juaristi 2018).

#### 4.1.4. Language use related dominance configuration table

One-off examples of the use of a language in a particular physical and socio-functional space, and even in specific domains and relationship networks, can help to clarify which is the dominant language. We have seen this already when describing *language behaviour*. In any case, when many individual language events are codified together in terms of media, overtness, style, domain or role relationship, we obtain a dominance configuration table; in this way, instead of individuals' language use, what we can obtain is group language usage at a given place and time, at least in some cases. It is precisely these cases that the label serves to identify.

The source for these tables is to be found in American sociolinguistics. From time to time, Fishman has chosen a specific case to give kinetic and dynamic descriptions of sociolinguistic situations. Take, for instance, the situation he found in his Yiddish speech community (Fishman 1972a: 92) (see table 18): "Intra-group Yiddish-English maintenance and shift in the United States: 1940-1970 summary comparisons for immigrant generation 'secularists' arriving prior to World War I'".

**Table 18: Fishman’s dominance configuration table**

Media	Overtness	Family role-rels. 1 2 3	Neighb. role-rels. 1 2	Work role-rels. 1 2 3	Jew Rel. / Cult role-rels. 1 2
Speaking	Production Comprehension Inner				
Reading	Production Comprehension				
Writing	Production Comprehension				

Elsewhere Fishman (1965b: 81) had used a more detailed categorisation, as can be seen in table 19.

**Table 19: Fishman’s more precise table**

Sources of variance			Domains of language behaviour					
Media	Role/ overtness	Situational	Family	Friends	Acquaint- ances	Mass media	Jewish organiza- tions	Occupations
Speaking	Inner <sup>1</sup>	Formal	X	X	X	X	X	X
		Informal	Y, E	Y, E	Y, E	E, E	Y, E	E, E
		Intimate	Y, E	Y, E	Y, E	E, E	Y, E	E, E
Speaking	Comp.	Formal	X	X	E, E	E, E	Y, E	E, E
		Informal	E, E	E, E	E, E	E, E	Y, E	E, E
		Intimate	Y, E	Y, E	X	X	X	X
Speaking	Prod.	Formal	X	X	E, E	X	Y, E	E, E
		Informal	E, E	E, E	E, E	X	Y, E	E, E
		Intimate	Y, E	Y, E	E, E	X	X	X

<sup>1</sup> “For ‘speaking-inner’ combinations, the domains imply topics as well as contexts. In all other instances they imply contexts alone.” (Footnote to original text.)

Reading	Comp.	Formal	Y, E	X	X	X	Y, E	X
		Informal	Y, E	X	X	X	Y, E	X
		Intimate	E, E	X	X	X	X	X
	Prod. <sup>2</sup>	Formal	Y, E	X	X	Y, E	Y, E	X
		Informal	Y, E	X	X	Y, E	Y, E	X
		Intimate	E, E	X	X	E, E	X	X
Writing	Prod.	Formal	X	X	X	X	Y, E	X
		Informal	E, E	E, E	X	X	Y, E	X
		Intimate	E, E	E, E	X	X	X	X

To describe intergenerational language maintenance and shift, Fishman (1972a: 92) developed a different table (see table 20). He gives a more detailed explanation of *role-relations* there.

**Table 20: Fishman’s table for describing language maintenance and shift**

Media	Overtness	Domains	Role-relations	Summary Ratings	
				1940	1970
Speaking	Production	Family	Husband-wife	Y	Y
			Parent-child	Y	E
			Grandparent-grandchild	–	E
			Other: same generation	Y	Y
Other: younger generation	E		E		
Neighbourhood	Friends	Y	E		
	Acquaintances	Y	E		
Work	Employer-employer	E	E		
	Employer-employee	E	E		
	Employee-employee	E	E		
Jewish Rel. / Cult.	Supporter-writer, teacher, etc.	Y	Y		
	Supporter-supporter	Y	Y		

<sup>2</sup> “For ‘reading-production’ combinations, the distinction between ‘family’ and ‘mass media’ domains is also a distinction between reading to others and reading to oneself.” (Footnote to original text.)

Even if there is no need to mark up tables such as this separately in our methodological framework, the possibility of doing so has been made available. Adding this possibility gives the system considerable flexibility: the person establishing such a table does not necessarily have to follow the outline described in point 4.1.1. Parameters which are irrelevant for their research or are not available can be left unmentioned. On the other hand, other parameters, for instance that of role relationships, can be developed in greater depth. Lastly, someone else could create another scale or set of terms. As can be seen in the tables by Fishman presented above, dominance configuration tables do not have to be all exactly the same. They can examine different domains and role relationships, and so on.

Let us stress just how powerful a tool such a table can be when it comes to describing language use: dominance configuration tables provide an exceptional opportunity for casting light on particular periods and places, gathering loose pieces of data from point 4.1.1. in a single place and offering a much more general panorama. For an example relating to Breton of an applied use of dominance configuration tables, see Broudic (1995: 341-342); for the Basque situation see Joly & Zalvide (eds) (2023: 407-499).

#### **4.1.5. Reason for 1A**

Sometimes, as well as presenting a speech act, or instead of doing so, a quotation explains what the (true or supposed) reason behind it is (or might be). This label, then, points to the existence of the reason for using a particular language, which is a key point for SHL.

This label for showing that the reason has been stated in a quotation must be differentiated from quotations that appear in the dynamic parameter. When applying our classification scheme to a text, we may tend to think that all motives and reasons should be marked for the third analytical parameter. That is not so: the third parameter is for annotating the reasons behind changes and evolutions recorded along the second analytical parameter, nothing else. In this case, the (true or supposed) reason for language use at a particular moment is being discussed.

#### **4.1.6. Summary of terms**

A summary of all the terms of this parameter and the full taxonomy is available at the end of this book in the appendix. The structure can be fully and more clearly seen there; it will be the same with each parameter described in this book: a summary of the terms of each cell is reflected in the full taxonomy in the appendix. The whole structure in its complexity and organization is reflected there.

## 4.2. 1B - DESCRIBING LANGUAGE COMPETENCE

The topic under discussion in the first cell (1A) was language use. In this second cell (1B), we analyse speakers' language competence. While the sociology of language has focused most on language use and attitudes to language, in this second cell the contribution of psycholinguistics (and, on occasion, psycho-sociolinguistics) is fundamental. The information recorded in 1A has implications for 1B and vice versa. Thus, we should bear in mind that sometimes data obtained from historical records is explicitly presented and, at other times, more frequently, it has to be derived from implicit information. Use (1A), for instance, calls for a certain minimum standard of skill. The opposite is also true: a certain level of skill necessarily implies a given use: in general, practical skills do not exist without activity. For example, when an inhabitant of a particular place, at a particular historical moment, is said to be a monolingual Basque-speaker, this means that he only uses Basque in ordinary, everyday activities in that place, although in some special activities (for instance, before a court) he may use only Spanish if he knows it, but almost certainly in those cases there will be a translation thanks to the mediation of an interpreter.

Cell 1B is divided into three specific subsections: *level of language competence*, *language competence acquisition mode* and *language competence loss mode*. In addition to these three main branches, we have included four further second-level terms: speaker's *linguistic repertoire*, *language competence related dominance configuration table*, *reason for 1B* and, as usual, *inference*.

The subsections of cell 1B must not be confused with *change in language competence* (cell 2B). The focus of 1B is synchronic, describing the language competence of a person at a given time, the sort and extent of language competence acquired and, perhaps, if such data is available, how he acquired that competence (at school, through ordinary daily use, after losing his mother tongue, etc). In 2B (*changes in language competence*), on the other hand, we are concerned with an evolution: the evolution in the number of Basque and non-Basque speakers between different dates, for instance. For further discussion of this distinction, see also cell 2B.

### 4.2.1. Speaker's linguistic repertoire

We are dealing here with people's or individual's linguistic repertoires, their ways of speaking, the repertoire of varieties they use (Fishman 1965b: 71). Those varieties may be from different languages. They may also be made up of dialects, sociolects, technolcts, ethnolects or any other type of variety, including standard language, taken from a single language. We use this label when we record information about collections of varieties or ways of talking.

#### 4.2.2. Level of language competence in Basque and other languages

There are many possible ways of describing people's language competence. In any case, the basic question for SHB is: what degree of language competence has been achieved in Basque and in the other language or languages by the individuals or broader groups of speakers we are examining at any given moment?

In principle, we must try to answer three main sets of questions here:

- a) Are the speakers monolingual or bilingual?
- b) What linguistic skills (listening comprehension, speaking, reading, writing) have they attained?
- c) What level have the speakers achieved in each skill?

##### a) *Are the speakers monolingual or bilingual?*

The first point to clarify is whether speakers are monolingual, bilingual (or multi-lingual). Although this appears to be a simple issue, it is not, in fact, quite so clear, particularly in descriptions from certain periods. What, in fact, is the meaning of '*euskaldun*' (literally *Basque speaker*) for the speaker that uses this word?

- Knows Basque (too)?
- Uses Basque (too)?
- Only knows Basque and, so, only uses Basque?

When answering these points, three levels of precision may be taken into account, depending on the type of historical data available:

- In many cases in the Basque country, sources from the distant past mention *euskalduna*, meaning a monolingual Basque speaker or, at the very least, hint that this is the case. In many documents, it is clear that the Spanish word *vascongado* or *bascongado* is being used to mean *monolingual Basque*. It does not mean "knows Basque" but, rather, "knows only Basque". In such cases, and concerning language competence, it may often be appropriate to divide speakers into two broad categories: *euskaldunak* (in other words, monolingual Basque speakers) and all others (monolingual speakers of languages other than Basque, speakers of a mother-tongue other than Basque who also know Basque and speakers of Basque who also know another language).
- This dichotomy may be enough for dealing with cases from the distant past, but it is likely to be inadequate for reflecting the situation over

the last two hundred years. In such cases, using *dominance configuration* style tables, often employed in sociolinguistics (at least since Uriel Weinreich's time), is the best approach bearing in mind SHB's objectives and its sources of information. For our purposes (for instance, to explain speakers' language competence 150 years ago in the province of Gipuzkoa) attempts have already been carried out at applying the *dominance configuration* scheme. We believe that the resultant table has a positive side: it can help us obtain an accurate picture of a situation at a particular moment and in a particular place. However, it also has a serious limitation: in many cases, it turns out to be impossible to fill in such a table, either because of a lack of information, because the categorization it provides is too detailed, or because it may be cumbersome when it comes to reflecting the situation in another place and time. But where there is enough information available, the resultant table is called a *language competence related dominance configuration table* (see 4.2.3.).

- Between these two extremes, a graded scale such as the following can often be used for speakers: *monolingual Basque*, *Basque bilingual* (a person who speaks Basque with greater ease, in a more natural, spontaneous, flexible way than languages other than Basque), *balanced bilingual*, *non-Basque dominant bilingual* (a person who speaks a language other than Basque with greater ease, in a more natural, spontaneous, flexible way than Basque), *monolingual non-Basque speaker*, *multilingual Basque speaker* and *multilingual non-Basque speaker*. As we are concerned with sociohistorical research, and not just sociolinguistics, this half-way scale will often be useful, as long as one bears in mind that it serves primarily for listening comprehension and speaking. In other words, reading and writing should be dealt with separately in parallel: in historical documents Basque bilingual speakers will appear as literate only in another language, or it is clearly apparent that they find it easier to write and read a language other than Basque. In just a few cases, however, there is evidence, apparently, of literacy only (or primarily) in Basque (Oihartzabal 1996: 39; Axular 1643 in Villasante 1977: 50). Clearly, in such cases, a double classification must be used: one for oral skills and one for written skills. In addition to the seven terms mentioned at the start of this paragraph, there are four more *unspecified* terms, to be used where sufficient information is lacking. Within each term, a fourfold distinction can potentially be made with regard to language skills: *listening*, *speaking*, *reading* and *writing*.

*b) How many active skills do speakers have in each language?*

This section attempts to clarify whether speakers know how to use each language orally and in writing: whether they only have receptive skills for each (listening comprehension/understanding, reading) or whether, in addition, productive skills too (speaking, writing). Altogether, the following skill configurations may be taken into account:

Language competence in Basque:

- Oral (understanding what has been said; speaking);
- Written (reading; writing).

Language competence in language or languages other than Basque:

- Oral (understanding what has been said; speaking);
- Written (reading; writing).

Finally, when it comes to differentiating between skills, as stated above, SHB has chosen a fourfold distinction – *listening*, *speaking*, *reading* and *writing* – to seek a balance between precision, practicality and ease for working purposes. Using these headings, we can know the degree of literacy of a speaker.

*c) Level achieved in each type of skill*

What level of skill do speakers have in Basque at a given time and place, with regard to listening and speaking? And with regard to reading, or writing, how competent are they? What level of skill do they have in the language (languages, if they know more than one) other than Basque? What level of skill do they have in listening, speaking, reading and writing?

All this makes it possible, as we have said, to present the language competence of a group of speakers at a particular historical moment and at a particular place. In summary, the terms which SHB has chosen for this purpose are the following: *general, undetermined; unspecified Basque speaker; unspecified non-Basque speaker; unspecified bilingual speaker; monolingual Basque; bilingual Basque speaker; balanced bilingual speaker; non-Basque dominant bilingual speaker; monolingual non-Basque speaker; multilingual Basque speaker and multilingual non-Basque speaker*. Within each term, of course, the four skills listed above may be taken into account.

### 4.2.3. Language competence related dominance configuration table

The language competence related dominance configuration table can be used to define the language competence of a single person or a language community. As with the language use related dominance configuration table (4.1.4), there is no need to use only the options and categories listed in the previous paragraph: researchers can design each table according to the data available or the needs of their research.

That being so, let us now give a simple example of this, obtained by using specific conceptualisation options. It seems, according to this, that most Basque speakers in the 17th century had the skill sets shown in table 21 (Joly, Zalbide: 2023).

Table 21: *Language competence related dominance configuration table (example 1)*

Skill	Monolingual Basque speakers, 17th century	
	Basque	Language other than Basque
Listening	Yes	No
Speaking	Yes	No
Reading	No	No
Writing	No	No

As has been mentioned above, there were other types of Basque speakers, a minority, in that century: see table 22.

Table 22: *Language competence related dominance configuration table (example 2)*

Skill	Monolingual Basque speakers, 17th century	
	Basque	Non-Basque
Listening	Yes	No
Speaking	Yes	No
Reading	Yes	No
Writing	?	No

#### 4.2.4. Language competence acquisition mode in Basque and other languages

Following the usual patterns used in language acquisition and learning, four questions may be answered in this section:

- When and how were L1 and, where applicable, L2 acquired?
- Of the languages known, which is L1 and which L2?
- Through which media have L1 and, where applicable, L2 been acquired?
- To what extent have L1 and, where applicable, L2 been mastered?

##### *a) When and how were L1 and, where applicable, L2 acquired?*

At least three main language competence acquisition modes must be taken into account:

- The usual, natural language acquisition mode: as children, at home and locally, in the neighbourhood and on the street, in local acquaintances and in the habitual friendship group.
- The secondary language acquisition mode: as children, young people or adults, as a result of interacting with L2 relationship networks. For instance, to give an example familiar to Basques, sending Basque-speaking children to Castile for them to learn Spanish.

- Acquiring L2 at school: as children or, more often, as young people, in a second language class, or as a result of studying in one or more languages other than Basque in secondary or tertiary education, learning one or more L2.

In SHB's terminology, the first two modes are called *acquisition via ordinary daily use*; the third, on the other hand, is defined as *learning via education*.

*b) Of the languages recorded, which is L1 and which L2?*

To draw up the social history of language in depth, both for the individual and for a group of speakers, one must never forget which language is L1 and which L2: did the speaker start out from a language other than Basque and subsequently learn Basque? Or was the journey the other way around? Or did he learn both languages at home? To answer these questions appropriately, four terms have been created: *speaker of indeterminate L1*, *L1 speaker of Basque*, *L1 speaker of language other than Basque* and *L1 speaker of Basque and a language other than Basque*. In this way, we define the linguistic starting point of a speaker or group of speakers, clarifying what their mother tongue or tongues are.

*c) Through which media was L1 acquired and, where applicable, L2?*

The four skills must be taken into account:

- Oral (listening comprehension; speaking);
- Written (reading; writing).

SHB uses these five terms to answer the above question: learning *language competence in general* (when there is little precise information), learning *listening competence*, learning *speaking competence*, learning *reading competence* and learning *writing competence*. We also include some variants according to the speakers' L1 linked to the linguistic registers. For instance, learning *speaking (or listening) competence in an everyday, informal register*, when the speakers acquired the language at home; and learning *listening (or speaking) competence as L2*, when speakers learned the language at a school and not at home or in the street. Speakers who have Basque as L1 can learn speaking (or writing) competence in formal registers at school if they are schooled in a Basque medium education model. This way, L1 informal linguistic skills can be completed and fully mastered with formal skills through schooling.

*d) To what extent have L1 and, where applicable, L2 been mastered?*

When considering the degree of acquisition of L2, at least four levels of achievement must be taken into account:

- Zero level in L2;
- Masters L2, but less than L1;
- Masters L1 at the same level as L2;
- Masters L2 better than L1.

SHB has not attempted to delve into the level of acquisition of L2: in most cases, that would be asking too much of the texts available and it would complicate this cell too much.

#### **4.2.5. Language competence loss mode in Basque or other languages**

SHB has organized the labelling of loss of language competence in the same way as its acquisition. So this area, too, is divided into four fields:

- When and how were L1 and, where applicable, L2 lost?
- Of the languages recorded, which is L1 and which L2?
- Through which media have L1 and, where applicable, L2 been lost?
- To what extent have L1 and, where applicable, L2 been lost?

In general, the organization of this section is similar to that of 4.2.4 but, in this case, speakers have lost rather than acquired the language. We are not going to repeat previously given explanations here (for details, see the full taxonomy in the appendix and Zalbide, Joly, Gardner 2015: 316-317).

#### **4.2.6. Reason for 1B**

In some cases, as well as presenting information on language competence, the quotation also explains what the (true or supposed) reason behind it is. This label, then, points to the existence of that reason. The information may be about the reason for having a given level of language (in)competence or about why that competence was achieved or lost.

In the table included in the appendix, the language acquisition mode is described exhaustively; in the following table 23, a simpler one is also proposed. It

is easier to use when marking real pieces of historical texts, but more simplistic from a theoretical point of view.

**Table 23: 1B - Describing language competence simplified**

1B - Describing language competence	Language competence acquisition mode	Mother tongue	Basque
			Language other than Basque
		Acquisition via ordinary daily use	Basque
			Language other than Basque
		Learning via education	Basque
			Language other than Basque
	Literacy	No	Basque
			Language other than Basque
		Yes	Basque
			Language other than Basque
	Style	Formal	
		Informal	
Intimate			

#### 4.3. 1C - DESCRIBING LANGUAGE STRUCTURE

Several branches of linguistics may be used as sources of information to define the social dimension of relationships between Basque and other languages and, in this way, throw light on the social history of Basque. As with the other parameters of our taxonomic proposal, the same can be said for other languages and geographical areas, for the social history of language in general. A focused study of the covariation of the social organization of language behaviour and language use with the linguistic production of particular moments can yield rich results. One of the consequences – not the only one, but certainly a fundamental one – is the possibility

of researching into how features of that linguistic production presuppose a given type of societal organization. Many authors and schools of thought have explained the connection between those two aspects. See, for instance, Siguán (1998: 738): “In Uriel Weinreich’s work *Languages in Contact* it is made clear that linguistic phenomena arising from language contact cannot be explained without taking into account the social situation in which these contacts take place”. Fishman made the same point time and again. Closer to the Basque country in geographical terms, finally, Bidart (1980: 95) is even clearer about the issue: “The state of the language provides information about the state of the whole social system”. That connection has been even more broadly established historically in theses about the connections between language and culture (or language and thought).

Consequences which can be derived from toponymy and anthroponymy, dialectology and language contact (above all, from the realms of interference and code-switching) are of use when drawing up the social history of Basque. So SHB must also consider these areas. Many examples could be given of the raw materials that anthroponymy, toponymy and dialectology can provide SHB with.

Although we have paid special attention to interference, code-switching, proper names and loan words so far in this cell, there is no reason why we should limit our perspective to these particular fields of linguistics when pursuing sociohistorical conclusions. The linguistic system itself is a topic of research here, the internal configuration of the language(-variety) which particular speakers or in general the language community have instanced at particular times and in particular places.

This cell’s second-level organization is threefold. Ordinary descriptive data derived from linguistic sources are collected under the heading *data derived from language structure* and this is the very heart of this cell. In addition to that main section, there are two further labels of a sort regularly used along this first analytical parameter: *reason for IC* and *inference*.

#### **4.3.1. Data derived from language structure**

Six language areas are distinguished in this main section: *global description*, *result of language contact*, *internal uniformity of language*, *power and solidarity indices*, *significant source (onomastics, paremiology and etymology)* and *other*. Each term’s meaning and use will be discussed in the following paragraphs.

##### *4.3.1.1. Global description*

This section has two main parts: a set of labels for *basic linguistic features* and *interlinguistic distance*.

The *basic linguistic features* set has been based on linguists' habitual categories: *phonetics*, *morphosyntax*, *lexicon* and *semantics*. We aim to collect data under these headings as long as it serves some sociolinguistic purpose.

At the same time, when describing a language, sociolinguistic data can sometimes be derived from its proximity or distance from some other language (on all levels of analysis: phonology, morphosyntax, vocabulary, semantics etc.). In fact, referring to the *interlinguistic distance* between Basque and its neighbouring languages is commonplace: on many occasions, rightly or wrongly, consequences have been drawn that are of interest to SHB. To be included under this heading, for instance, are the not infrequent affirmations on the survival of Basque and about the difficulty of learning it, when based on arguments of linguistic distance.

#### 4.3.1.2. *Result of language contact*

In this section, there are also two main parts: *interference and loanwords* and *code-switching*. Data from the language contact field is of use for throwing light on sociohistorical situations at particular moments in time, above all concerning interference and code switching in the speech of local bilinguals. This kind of data may give important information to enlighten the sociolinguistic situation of a particular place in a particular time and its evolution (Schendl 2012). The nature of the interference can be defined following the typology established by Uriel Weinreich (1953). The intensity of code switching can serve as a measure (on a scale such as continually/often/occasionally/very seldom) and also as an approach to the topic of who uses what language, with whom and to what purpose. It is difficult, of course, to find much historical documentation about interference or code switching in the Basque case. However, what has already been collected is by no means insignificant. See, for instance, Legarda (1953). There are reasons for believing that there will be opportunities to gather further testimony, particularly from the 18th century until the present day.

We believe it is worth taking into account in this section the scale proposed by Thomason and Kaufman (1988). Their scale seems to be appropriate for researchers working in the field of the social history of languages. The basis for the distinctions made by these two authors is the results of language contact, and serves to measure the degree of its impact. How a language changes is defined according to the intensity of contact. Fennell (2001: 86-88) summarises Thomason and Kaufman's scale as follows:

1) **Casual contact: lexical borrowing only.**

*Lexicon*: Content words. For cultural and functional (rather than typological) reasons, non-basic vocabulary will be borrowed before basic vocabulary.

2) **Slightly more intense contact: slight structural borrowing**

*Lexicon:* Function words, conjunctions and various adverbial particles.

*Structure:* Minor phonological, syntactic and lexical semantic features. Phonological borrowing here is likely to be confined to the appearance of new phonemes with new phones, but only in loan words. Syntactic features borrowed at this stage will probably be restricted to new functions (or functional restrictions) and new orderings that cause little or no typological disruption.

3) **More intense contact: slightly more structural borrowing.**

*Lexicon:* Function words: adpositions (prepositions and postpositions). At this stage, derivational affixes may be abstracted from borrowed words and added to native vocabulary; inflectional affixes may enter the borrowing language attached to, and will remain confined to, borrowed vocabulary items. Personal and demonstrative pronouns and low numerals, which belong to the basic vocabulary, are more likely to be borrowed at this stage than in more casual contact situations.

*Structure:* Slightly less minor structural features than in category (2). In phonology, borrowing will probably include the phonemicization, even in native vocabulary, of previously allophonic alternations. This is especially true of those that exploit distinctive features already present in the borrowing language, and also easily borrowed prosodic and syllable-structure features, such as stress rules and the addition of syllable-final consonants (in loan words only). In syntax, a complete change from, say, SOV to SVO syntax will not occur here, but a few aspects of such a switch may be found, as, for example, borrowed postpositions in an otherwise prepositional language (or *vice versa*).

4) **Strong cultural pressure: moderate structural borrowing.**

*Structure:* Major structural features that cause relatively little typological change. Phonological borrowing at this stage includes: introduction of new distinctive features in contrastive sets that are represented in native vocabulary, and perhaps loss of some contrasts; new syllable structure constraints, also in native vocabulary; and a few natural allophonic or automatic morphophonemic rules, such as palatalization of final obstruent devoicing. Fairly extensive word-order changes will occur at this stage, as will other syntactic changes that cause little categorial alteration. In morphology, borrowed inflectional affixes and categories (e.g. new cases) will be added to native words, especially if there is a good typological fit in both category and ordering.

5) **Very strong cultural pressure: heavy structural borrowing.**

*Structure:* Major structural features that cause significant typological disruption: added morphophonemic rules; phonetic changes (i.e. subphonemic changes in habits of articulation, including allophonic alternations); loss of phonemic contrasts and of morphophonemic rules; changes in word-structure rules (e.g. adding prefix- in a language that was exclusively suffixing or a change from flexional toward

agglutinative morphology); categorial as well as more extensive ordering changes in morphosyntax (e.g. development of ergative morphosyntax); and added concord rules, including bound pronominal elements.

This otherwise robust explanation omits semantic interference: the contact of Basque with Celtic languages, for instance, resulted in the word *otsail* (February), counting in twenties and the ordering of loan words for months; contact with Latin resulted in the loans *txorta(n egin)* and *larrutan egin* ('have sex'), and, from the word *integritas*, the similar concept of *osasun* ('health' and, literally, like the Latin term, 'wholeness').

We have divided the *interference and loanwords* section up into the usual four linguistic categories: *phonetics*, *morphosyntax*, *lexicon* and *semantics*.

#### 4.3.1.3. *Internal uniformity of language*

In this section, among other things, we collect data that can be derived from dialectology. Our perspective, however, is somewhat different as we tend to ask: to what extent is there a unified language? This question can be interpreted in more than one way: about the *degree of fragmentation* 'how far is that language fragmented, normally without any specific planning, in a geographical sense (data about dialectology can be included in *geographic fragmentation*) or a social one (*social fragmentation*)?' and, about the *degree of standardisation*, 'how far has that language been standardised, normally as the result of specific planning?'. Information linked to what is called in historical sociolinguistics *sociolinguistic space* is to be included here. Rutten defines *sociolinguistic space* as "the complete varietal spectrum from base dialects to standard or hyper-standard that language users have at their disposal at a given place and time" (Rutten 2019: 33). In the same way, information about *diaglossia* is also to be included in this cell (see here 4.1.3.2. and Rutten 2019). Axular in 1643 claimed the lack of standardisation in this example: "If as many books had been written in Euskara (Basque) as in Latin, French, or other foreign languages, Euskara would also be as rich and perfect as they are, and if this has not happened, it is the Basques themselves who are to blame, not Euskara." (Pedro de Axular 1643: 224).

One can also observe that different *degrees of standardisation* and *types of standardisation* are possible; Briggs brings us a valuable example of two different types of standardisation in the sociolinguistic history of language: "England, unlike France, did not have an Academy, so that 'codification' in France was more authoritarian, formal and centralised than in England" (Briggs 1986: 182).

#### 4.3.1.4. *Power and solidarity indices*

“The Pronouns of Power and Solidarity” of Brown and Gilman (1960) is extremely productive when applied to highlight certain features of Basque historical social behaviour. Their work explains how and for what the T/V distinction (in Basque ‘hi/zu(ek)’ along with the third person ‘berori’) has been used. Giving detailed answers to these questions, several pieces of sociological data have been obtained (see, in particular, Alberdi 1993, 1994, 1996).

#### 4.3.1.5. *Significant source (onomastics, paremiology and etymology)*

To denominate several other relevant meaningful areas of language, we have used the label *significant source (onomastics, paremiology and etymology)*, distinguishing these three elements: *naming, paremiology and etymological explanations*.

The term *naming* includes the onomastics field of linguistics in its entirety: *place names* (toponomastics) and *personal names* (anthroponomastics). The linguistic data from these fields is of use for defining and enriching knowledge about situations in the past (particularly in the distant past). From what we know at present and taking into account the historical reality of the Basque Country, the field of onomastics cannot be ignored, even though its original objective was different. We stress once again that we are not interested in onomastics *per se*: that is a field for linguists. The results they obtain, however, are of considerable interest because of the opportunity they give us to draw sociolinguistic conclusions.

Data for sociolinguistics, however, can proceed from at least five areas of naming: in addition to the two we have already mentioned (place names and personal names), other potentially appropriate sources of information include *ethnonyms, glottonyms* (including names of language varieties) and *names of things* (for instance, names of particular tools or technologies). In short, several other categories must be added to the two categories commonly used by linguists. In all of them, and in addition to linguists’ habitual analyses, two further approaches can be of particular interest: examining word formation and comparing the evolution of specific sets of names (particularly of place names) over time.

Secondly, *paremiology*, too, must be taken into account. As Intxausti (2007: 241) has clearly stated, paremiology is one of the topics examined by the social history of language: see, for instance, Obelkevich (1987: 43-72). It is thanks to Urkixo (1920: 18), for instance, that we have a specific mention of bilingual code switching between the principal Basque nobles (*ahaide nagusiak*) from Biscay in the Middle Ages, based on a local saying. As for sources, furthermore,

the first Basque paremiologists should not be overlooked: Garibay, Oihenart, Voltoire and Sauguis.

We have named the last branch in this set *etymological explanations*. As in the other cases, we are interested in it to the extent etymologies (whether real or imagined) yield up sociolinguistic data.

#### 4.3.1.6. *Other*

As usual, this catch-all term is for cases not covered by any of the previous terms on the list or which are too general to be more precisely labelled.

#### 4.3.2. **Reason for 1C**

As in the other cells of the first analytical parameters, in 1C, too, we include a label for recording the reason given for it. As we have already mentioned the purpose of this term (see 4.2.6, for instance), we will not repeat the explanation here.

### 4.4. **1D - DESCRIBING SOCIETAL FEATURES**

Strictly speaking, Column D does not directly record any linguistic content. It is essential, however, for relating data about the language and, above all, the changes in the data (or lack of them) occurring over the years, generations and centuries to the phenomena of societal evolution and development. See section 3.1.4. for further details. The nature, direction and extent of these links have given rise to many different types of reflection: for specific moments and places see, for instance, Hartig (1981).

Cell 1D, specifically, takes into account the elements required to provide basic descriptions of the social matrix. This cell offers an opportunity to introduce in a structured way what the various fields of study which also embrace language often refer to as external factors. The organization of the cell's second level is threefold: ordinary descriptive data are grouped under the heading *data relating to societal features*. In addition to that main section, a further two labels have been included: *reason for 1D* and *inference*.

#### 4.4.1. **Data relating to societal features**

Five basic labels have been created for the explanation and description of the social matrix: *general/undetermined*, *demographic features*, *econotechnical features*, *political-operative features*, *psychosocial and sociocultural features*.

In both this analytical parameter and in the following, we must examine what is the main question each label addresses, to distinguish between those terms and facilitate the use of this terminology.

Bear in mind that these questions are completely contextual. The population, period, place and, when appropriate, domain under examination must be carefully considered.

#### 4.4.1.1. *General, undetermined*

As usual, the *general, undetermined* label must be used when a piece of data, in this case, one related to societal features, cannot (for whatever reason) be assigned any other label or, if appropriate, labels, or when it is too vague.

#### 4.4.1.2. *Demographic features*

Demographic features are one of the most important variables to understand the sociolinguistic evolution of a speech-community. Any change in this field can bring about dramatic effects in a sociolinguistic situation. This is why the demographic features of a given geographical area must be recorded. In this field, for instance, demographic information about the presence of foreigners in the Basque region of Gipuzkoa during the 16th and 17th centuries, as stressed by Irixoa (2012) is of great practical interest to clarify the sociolinguistic situation of the area at that time. To the general and habitual information about immigration, emigration, birth rate, death rate etc., other more particular details can be added as an answer, for example, to the following questions linked to the *proportion and number of speakers* concept of our taxonomy (see 2.2.2):

- How many people live, or how many people are we considering, in the geographical area covered by our work?
- What is the degree of concentration of that group of people, considered internally? (Internal group analysis: to what extent does the set of people we are examining live side-by-side in a particular place, with opportunities for face-to-face interaction? To give a fictional but illustrative example, it is not the same thing to say 100,000 Basque speakers lived in Argentina around 1900, packed into a single district the size of Gipuzkoa province, or that they were very widely dispersed throughout the whole of Argentina).
- What is the density of that set of people considered externally? (External group analysis: what is the size of the set of people we are examin-

ing, in comparison with an external group or in the context of a broader universe including speakers of other languages?)

For the task of categorizing data for demolinguistic purposes, a substantially more detailed filter can be added to these three questions in some cases (Veltman 1983).

#### 4.4.1.3. *Econotechnical features*

Econotechnical features (economical and technological features) are also an important variable to understand changes in particular sociolinguistic situations. As is well known, a new organization of rail or road networks can bring new languages to remote geographical areas. An endless list of questions can be linked to econotechnical features, for instance:

- How do people earn their living? From livestock or arable farming, mining, fishing, the sea, trade (wholesale, retail, bargaining etc.), industry (ironwork, shipbuilding, building houses, carpentry and tool making, crafts etc.), service sector employees or overseers, municipal employees (forester, municipal secretary, teacher, soldier etc.)?
- How many people work in each sector?
- Where is each set of people situated in the social hierarchy? What economic rights and obligations do they have?
- What technological procedures does that set of people possess? What for? Who leads the work process?
- What type of property rights are in force: communal exploitation (village lands, grazing and woods) or private property?
- What is the main type of production: subsistence and saving, or the promotion of extensive production and consumption?
- What is the work perspective: workmates, owner, communal neighbourhood work?
- What technological innovations are there (for instance, the invention of the printing press)?

#### 4.4.1.4. *Political-operative features*

Like other external factors, political-operative set-up and its evolution can seriously impact the sociolinguistic situation of a given community. Changes

in status, laws etc., which have no direct link with language can bring deep changes in society and in its sociolinguistic panorama. As in the previous case, an endless list of questions can be linked to the *political-operative features* label, among others:

- What type of basic authorities are there: lineage-based; neighbourhood, village or valley-based? What more formal political organizations are above them? What internal and external ecclesiastical authorities? Are those authorities geographically close or far away?
- External and internal points of tension: what are they like, why do they exist, what are they for?
- What sort of participation is there: by right or obligation?
- How is decision-making organized: in broadly based groups, by representatives, individually?
- What are the means of coercion: what are they like, how many are there, who controls them?

#### 4.4.1.5. *Psychosocial and sociocultural features*

Finally, the last variable linked to societal features which can influence sociolinguistic reality includes the psychosocial and sociocultural features of the society. ‘Psychosocial features’ means data on or relating to processes or factors that are both social and psychological in origin. Sociocultural features can be difficult to define but are ultimately linked to the traditions of a society and the way of life of people who are part of that society. Even if in scientific research both psychosocial and sociocultural aspects can be identified, when treating sociolinguistic data both are commonly linked. For example, when Febvre (1947) in his *Le problème de l’incroyance au XVIème siècle* claims that it was almost impossible to be an unbeliever in the French society of the 16th century, the link between psychosocial and sociocultural levels is clear: one perpetuates the other, and it is hard to determine which came first: it is probably the phenomenon Morin has called recursion (2005). Frequently there is an interaction between both levels that makes it hard to assign the data to just one of the two levels of analysis: this is why we decided to include both parameters under the same heading.

In the case of psychosocial features, our interest will depend on the topic of our research, but the following topics can be considered of special interest in the case of Basque:

- Politeness, courtesy, ethical code. Take for example this rough translation of a traditional Basque observation: “Kristauak hori egin!” (“How could a Christian do such a thing!”).
- Demonstrations of faith and belief: in general, not private. Living belief and faith vs. daily religious practices (prayer, fasting etc.) vs. respecting public demonstrations of faith.
- Mechanisms connected with the urban/rural dichotomy (including *Gemeinschaft/Gesellschaft*).
- The value of giving one’s word/decisiveness of written documents.
- Dimensions of “we”: by lineage, by local district, by *dot/det/dut* dialect distinction, by province (*uskaldun/manex* etc.), Basque<sub>1</sub> (by speech)/ Basque<sub>2</sub> (by descent)/ Basque<sub>3</sub> (by territorial unity), subjects or servants of a monarchy/citizens of a nation-state etc.

In the case of sociocultural features, here are some examples of questions of interest:

- Features of ordinary everyday life: how people dress, clean themselves, brush their hair, adorn themselves; what and how they eat and drink; daily work activity: working hours and leisure time.
- Occasional large-scale events and other types of celebration: betting on sports; dancing, singing, theatre, improvised sung poetry, ‘modern’ sporting events.
- Special days at particular times of the year: village festivities, minor religious celebrations, local fair days, festivities and holidays of the ‘more modern’ world; what to do and how to behave.
- Once in a lifetime events: birth (marriage, having children, breaking up or being widowed) and death.
- Paths to socialisation: home, friends, school, work.
- Status and role in the home, in the neighbourhood, in the village and in broader areas of life.
- Family-internal organization: type of family (extended / nuclear etc.); what corresponds to who; how family wealth is divided up amongst heirs.
- Neighbourhood life: overtness of relationship networks and strength of neighbourhood ties.

#### 4.4.2. Reason for 1D

As in the other cells of this first analytical parameter, in 1D, too, we include a label explaining the reason for it.

### 4.5. 1E - DESCRIBING LANGUAGE ATTITUDES

Cell 1E is for recording opinions, attitudes and ways of behaving with regard to Basque and other languages, to their speakers, and to using those languages at given times and places. Research about language attitudes and opinions is a pretty large and complex field of inquiry. The link between what peoples think in reality, what they think and claim to think in a theoretical situation and what they do in fact is a challenging field of research (LaPiere 1934 in Joly, Uranga: 2010) linked to cognition and psychosocial research; and many paradoxes and contradictory pieces of information occur, sometimes linked to cognitive dissonance and adaptation (Festinger 1957), but providing a wealth of substantial information about the sociolinguistic situation of a language (Joly 2004a). This book tries to present a taxonomy for research in historical sociolinguistics, but we cannot present all the theoretical debates and theories linked to each concept included in our taxonomy and in this field of research. It would have been interesting to present here the numerous debates about linguistic ideologies (Beacco 2001), speech community (Bloomfield 1933, Fishman 1971a, Gumperz 1971, Labov 1972, Mackey 1972, Hudson 1982), linguistic identity (Tabouret-Keller 1997), dichotomies such as mentalist vs behaviourist point of view about attitudes (Agheysi and Fishman 1970, Cooper and Fishman 1974, Fasold 1984), internal motivation versus external motivation and integrative attitude/motivation versus instrumental attitude/motivation (Lambert and Gardner 1972), covert versus overt language attitudes, etc. Most of these questions are very interesting and offer great perspective and fruitful avenues in research, both internationally and in the Basque area (see, for instance, all the books already mentioned in this paragraph and Baker 1992, Lasagabaster 2003, Sanchez Carrion 1991, Amorrortu 2009, Joly 2017, Joly and Uranga 2010, etc.), but in historical sociolinguistics there is a clear lack of sources to answer all these questions, many of which are very theoretical, such as establishing the components of attitudes, how to influence attitudes etc. (see Ajzen 1988, Agheysi and Fishman 1970, Cooper and Fishman 1974). These questions are interesting for language planning, but are hard to answer in the field of historical sociolinguistics because of the lack of congruent sources. All in all, even if establishing the link between opinions, attitudes and behaviour from a theoretical point of view is not central in our historical research, gathering information about attitudes, opinions and behaviour is essential for determining the sociolinguistic situation of a language. Particularly, contradictions between opinions, attitudes and behaviour provide valuable information about the reality of a situation. In the field of historical

sociolinguistics, questions about language ideologies, language prestige, linguistic purism and so on are linked to this cell (Hernández & Conde 2012: 571-654).

#### 4.5.1. Attitude about what?

This is the main part of cell 1E. Here we can state the subject of the opinion, attitude or behaviour that opinion-givers have expressed. From a sociolinguistic point of view, six fields of interest have been determined. The opinion can be about: 1) *language use: A*, 2) *speakers and their language competence: B*, 3) *languages: C*, 4) *ethnicity: D*, 5) *language attitudes: E* and 6) *other*. The letters included in the first five labels (A, B... E) are to link them with the dimensions SHB uses.

##### 4.5.1.1. *Language use: A*

This label, then, is for classifying all information on opinions about, attitudes towards and behaviours relative to language use. Among other things, connections between language use and attitudes can be marked in this section (Zalbide, Joly, Gardner 2015: 342-345).

Opinions, attitudes and behaviours involving the use of different languages can be of interest for SHB: to reflect that, the subterms *Basque* and *language other than Basque* have been distinguished.

##### 4.5.1.2. *Speakers and their language competence: B*

This label is for marking all information on opinions given about speakers and their language competence (both on the level attained and their efforts to strengthen it), that is to say, about dimension B.

##### 4.5.1.3. *Languages: C*

This label is for marking all information on opinions about languages themselves and their intralinguistic features (in other words, about dimension C). Amongst other things, this section includes statements about what constitutes good and bad Basque, if Basque is useful or not for modern life and so on. Ideologies linked to the place of language in the national model, the different kinds of representations linked to language in itself, folklorisation of the non-standard-language and so on are central questions in historical sociolinguistics that are linked to this cell. As we can see, in each cell of our taxonomy a whole field of research can be opened up; Rutten, for instance, offers a substantial development of this question when analysing the situation of the Netherlands between 1750 and 1850 (Rutten 2019).

#### 4.5.1.4. *Ethnicity: D*

This label is for marking all information on opinions about ethnicity (in other words, dimension D).

Such opinions may be given about all ethnic groups: *Basque ethnicity* and *Non-Basque ethnicity* subterms have been distinguished to reflect this diversity. Strong connections have been found, in many cases, between ethnicity, language, representation and identity. The different prejudices and preconceived judgements have occasionally been debated by historians. For Basque identity in the Middle Ages see, for instance, Larrea (2002).

#### 4.5.1.5. *Language attitudes: E*

This label is for marking all information on opinions about attitude to language (in other words, dimension E). Opinions about opinions, attitudes and behaviour can be marked in this section. Much information about the linguistic awareness of the population investigated, for example, can be included in this cell.

#### 4.5.1.6. *Other*

As usual, we have added the usual catch-all category to reflect data about opinions, attitudes and behaviour which do not fit into the previous five categories.

### 4.5.2. **Reason for 1E**

As in the other cells of this first analytical parameter, in 1E, too, we include a label explaining the reason for it.

## 5. KINETIC PARAMETER

The descriptive parameter provides a “snapshot” of a specific place and moment. The kinetic parameter, on the other hand, aims to examine the changes which have happened from one moment to another in a particular place, more of a “video” than a “still” (Fishman *et al.* 1985; Lewis 1971; Leopold 1959; Withers 1984, 1986).

In this chapter, we use the commonly used term “change”, but in SHL the description of this kind of diachronic point of view may not always suppose a change: a sociolinguistic situation may remain the same for generations, and this kind of no change/ lack of change is of particular interest for SHL, especially when the societal features change but language use remains the same. Within this context and for the sake of simplification the word “change” must be understood here as “change + no change”. The same can be said for the term “evolution” in this chapter. Our interest is in change or lack of it, evolution or lack of it when meaningful.

The following examples are about the kinetic parameter: have there been changes with regard to the use of Basque between moment A and moment B (in other words, over 25 years, 100 years, etc)? Is there a difference between the language competence of the group of speakers at moment A and moment B? Is there a difference between those bilingual speakers’ speaking and writing (above all in oral and written production of Basque) between moment A and moment B, visible in their behaviour in the fields of interference and code-switching? Have there been changes in the features of the social matrix from one moment to the other? And, lastly, has there been a change in language opinions, attitudes and behaviours between moment A and moment B?

Fundamentally, what the kinetic parameter requires are comparison and contrast: directly or indirectly comparing two moments A and B, in a particular dimension (language use, language competence, the language’s internal structure, the social matrix and language opinions-attitudes-behaviours) analysing whether *maintenance* or *change* (sometimes *shift*, other times *death*, on occasion *reversal*) are dominant.

Table 24 provides a summary of the five dimensions for the second analytical parameter.

Table 24: Cells on the kinetic parameter

Code	Standardised term
2A	2A - Change in language use
2B	2B - Change in language competence
2C	2C - Change in language structure
2D	2D - Change in societal features
2E	2E - Change in language attitudes

### 5.1. 2A - CHANGE IN LANGUAGE USE

There is an extensive bibliography on this topic with regard to Basque (Irigaray 1974; Oyharçabal 2001; Reclus 1929 [1867]; Yrizar, 1973b). And even more information will become available from comparing data accumulated in cell 1A. The basic concept in this area is *language shift*. Let us start, then, with the following explanation (Zalbide 2008: 1):

When we say “change of language” we are referring to the phenomenon known as *language shift* since the time of Uriel Weinreich. Its original definition is “the change from the habitual use of one language to that of another” (Weinreich 1953: 68). To put it another way, the *language shift* from language A to language B consists of a group of speakers (or an entire speech community) partially or completely abandoning language A - which they have used until that time in their usual, everyday behaviour - and using language B from then onwards.

“Language Maintenance and Language Shift as a field of inquiry” is what Fishman (1964) called this section around 50 years ago, and, since then, it has become one of the main fields of study in the sociology of language (Fishman (ed) 1978). The concepts of *language maintenance* and *language shift*, in particular the latter, are examined in this section. To do this, it seems sensible to define *when* and *where language shift* takes place with the conceptual tools of the sociology of language. Let us take, for instance, the classic explanation from the book *Reversing Language Shift* (Fishman 1991: 55): “the location of shift in the total ‘socio-cultural space’ of a speech community is an indication of just where the stresses and strains of cross-cultural contact have eroded the ability of the smaller and weaker to withstand the stronger and larger”. Language shift describes a well-recognised phenomenon: that of a shift (and, further down that path, language loss)

of speakers (some, many or all of them) of weakened language A to using language B, the dominant language in the context. This is not a sudden overnight change, but, rather, a gradual, step by step one. The following sequence has been proposed for this downward *continuum*, starting from the slightest weakness and heading to the most calamitous: *language attrition* (which usually presupposes the spread of another language), *shift*, *endangerment*, *contraction*, *obsolescence*, *loss*, *disappearance* and *death*. The languages affected by, i.e. resulting from, these processes have been described using specific terms: *declining*, *endangered*, *threatened*, *obsolescent*, *moribund*, *extinct* and *dead languages*.

Language shift must not be confused with a speaker, or a handful of speakers changing from language A to language B in a specific place and for a specific purpose. They are two different things. Language shift is a macro-sociological event that normally takes place over two or more generations; it is not a micro-sociological process of adaptation affecting a few speakers at a particular time.

This point has often been studied in the Basque region too, and the basic objective is to answer the following questions: “over time, what change has happened in the social organization of language behaviour in a particular place?” In general, has an evolution occurred? To what extent? Where, specifically, in physical or socio-functional space?

Concerning the Basque world, we would particularly like to address three points: how to deal with the distant past, how to deal with more modern periods/points of comparison and the direction of evolution of language use (in other words, language shift). Let us examine these three aspects, then, before looking at SHB’s system for labelling within this cell.

#### *A) How to deal with the distant past*

To answer the questions listed above, in general, one must look for standardised responses and, with regard to the distant past, always or almost always for Basque/non-Basque assessments. This description from the historian Lacarra (1972), for instance, may be seen as such an assessment, matching, as it does, several historical sources, although not fully agreeing with some other experts’ conceptualisations (for instance, Caro Baroja’s):

There is no doubt that by that date there were no traces left of Roman authority in the territories of ancient Vasconia; urban ways of life which the Romans had brought had died out; once many rural property owners had fled or died, the villas and structures created around them had disappeared. We can deduce that the rural Basque world had imposed itself on the Latin superstructure.

Of course, it is difficult to draw precise conclusions about *language maintenance* and (*reversing*) *language shift* from that explanation. The average corollary is clear, however, and matches well with what the scant documentary sources have to say some centuries later. There may be a type of RLS there, with immigration and emigration playing their part in that shift. However, it is not possible to draw out any great detail about the social dimension of Basque from those few facts. Was only Basque spoken in that new situation? Did Basque and other languages remain compartmentalised in socio-functional terms, and was a new sociocultural and econotechnical basis for intergenerational transmission of traditional diglossic patterns developed in the Basque region? If that were the case, what position did Basque hold in the new social order, what place did Latin have (above all, in writing), and what was the place of Navarrese Romance (orally)? In which domains was Basque completely dominant, and in which domains were languages other than Basque dominant (particularly, in relationship networks and role relationships connected with political and religious power structures)? In the same way, from around 1250 onwards, when the local Romance languages began to take over from Latin, in the H diglossic function, what was the new shape of the socio-functional compartmentalisation of the H level between Latin and local Romance languages which Mitxelena (2010) mentions? And what type of relationship and division of roles – both in physical and geographical space as well as in the socio-functional space of oral activity – did Basque and the numerous local Romance languages have? These are fundamental questions that have yet to be properly addressed and which the SHB project will be able to clear up (or help to do so) in the future, by collecting data on a large scale and systematically exploiting it.

The Basque speech community provides many examples of bilingual diglossia. In many local areas and relationship networks, in particular, this formulation has lasted for long periods. Testimony about it has sometimes been collected and conclusions have been derived from specific data on other occasions. Martin Haase's essay (1992: 687-698), for instance, should be included in the latter group.

### *B) How to deal with more modern periods/points of comparison*

The information which can be obtained about the coexistence of Basque and other languages over the last two or three centuries is very different in nature. In cases for which there is ample data (for instance, for the last 200 years), the best approach to research is to take the situations at different moments and compare them. This type of research is known as *study in real time* in the English-language sociolinguistic bibliography (Labov 1972, 1994: 43-112, 2001: 75-78; Conde

2007: 86; Hernandez & Conde 2012: 262, 485-486; Mas i Miralles 2003: 3; Turell 2003). Comparison tables such as table 25 could be the right way to approach this.

**Table 25: Classification of domains to show evolution over time**

Media	Domain	Role relationships	Moment A	Moment B
Speaking	Family	Between husband and wife Between parents and children Between grandparents and grandchildren Between siblings (at home) Others (parents' generation) Others (children's generation)		
	Neighbourhood	Between friends Between acquaintances		
	Sports / leisure	Between sports players Between dancers		
	Education	Between pupils and teachers Between pupils Between teachers		
	Work	Between workmates With customers and suppliers With boss		
	Authority	Between council departments With people in council area In chartered institutions In jurisdiction of kingdom At trials		
	Religion	Praying (at home, in church etc.) Hearing Mass Preaching and listening to sermons Promoting Christian teaching		
	Village life	Public activities Market-day selling and buying		
	Others			

In many cases, this way may turn out less productive than expected: for one thing, lack of data is a serious obstacle. However, we are going to have more and more data available, and that is not the main handicap of this approach (Fishman 1991: 52-54).

Unless we are mistaken, the main weakness of this approach will turn out to be that comparable situations cannot be documented, or only with great difficulty.

Another approach, one which, seemingly, may be easier to apply to data from the last fifty years, is the following: examining at a particular place and time the language behaviour of young or very young people and comparing it to that of adults or old people, as there are noticeable differences between the two. This approach, with all its limitations, is by no means to be scorned and such testimonies are sometimes available in historical documentation. This type of research is known as *study in apparent time* in the English-language sociolinguistic bibliography (Labov 1972, 1994: 43-112, 2001: 75-78; Conde 2007: 86; Hernández & Conde 2012: 262, 485-486; Mas i Miralles 2003: 3; Turell 2003, Nevalainen & Raumolin-Brunberg 2003: 53-100). This approach has provided notable results in the sphere of linguistics, and could well prove appropriate in the sphere of sociolinguistic information for social history. For evolution in a district of Bilbao see, for instance, Gaminde (1994). However, this approach does have its limitations: the age variable may be meaningful in the socio-functional compartmentalisation of languages: age-based contrasts may be stable in some situations. In such cases, the age-based differences do not indicate a historical evolution. In some pieces of research work, researchers have first used *apparent time* and, some years later, *real time*. Sankoff, for instance, took research projects in *apparent time* and compared them with *real time*. According to Sankoff (2006: 9), four different types of development can be seen: “Since 1995, we have seen an increasing number of real-time studies (most frequently, re-studies of sociolinguistic or dialectological research of the 1960s and 1970s). Many of the original studies made apparent time inferences, and for researchers carrying out restudies, it has been tempting to treat these inferences as predictions. However, we should note that there are, in the historical sense, not two but four possible further developments to be observed in the subsequent studies. First, if the original age distribution is repeated at the same level, we interpret the outcome as static age grading. Second, when we note a repeated age gradient at a higher level of the change, we interpret the result as a real time change. The third possibility is that all age groups display the same high level of the variable, which we interpret as the last phase of change going to completion. In this case, the trend study should show no further increase on the part of a new generation of young speakers. Since eventually all changes are completed, it may be unreasonable to think that the absence of continuing change constitutes a “failed prediction”. The fourth possibility is that change is reversed, usually as the effect of stigmatization from above”.

The points of comparison used in the previous two paragraphs to detect evolution are comparing one moment in time with another and comparing the language behaviour of two or more generations at the same moment. As Labov

mentions, it must be borne in mind that a change may be a *generational change* or a *communal change*.

For generational changes with regard to grammar, see Weinreich *et al.* (1968: 144-146). Labov clearly states the relationship between *apparent time* and *real time*, and also defines *generational change* and *communal change* within that context. It is worth looking at what Labov has to say about this. The reader should take into account that Labov's specific objective is to examine the evolution of the internal structure of the language: "(1) If the behavior of individuals is stable throughout their lifetimes, and the community remains at the same level, there is no variation to analyse, and we have *stability*: the stable, invariant, homogeneous situation that was once considered optimal (...). (2) If individuals change their linguistic behaviour throughout their lifetimes, but the community as a whole does not change, the pattern can be characterized as one of *age-grading*. (...) (3) *Generational change* is the normal type of linguistic change that we have been considering so far – most typical of sound change and morphological change. Individual speakers enter the community with a characteristic frequency for a particular variable, maintained throughout their lifetimes; but regular increases in the values adopted by individuals, often incremented by generations, lead to linguistic change for the community. (4) The converse of this pattern is *communal change*, where all members of the community alter their frequencies together, or acquire new forms simultaneously. This is a common pattern of lexical change, as Payne (1976) found in her study of speakers entering the Philadelphia community. It appears to be a basic pattern for syntactic change as well, as Sankoff and Brown (1976) found in the development of Tok Pisin relatives and as Arouad (1980) found in the development of the English progressive." (Labov 1994: 83-84)

Other types of points of comparison can also be established, of course: for instance, what a single generation tells us about its childhood gives us a point of comparison if we compare that with its current practice, in order to distinguish between use then and now within a single lifetime and, as a result, to become aware of the change (its direction, breadth and depth) that has occurred from childhood or youth to adulthood. In a similar way, what is happening in one place (a valley, a village etc.) can be compared with what is happening in another. We will probably be able to establish other types of points of comparison too, although they may be less frequently used.

### C) *Direction and extent of changes in language use*

Finally, in addition to the features already mentioned in this overview of changes in language use, we must also give some definition of the **direction of change**. Simplifying, if we exclude stable situations where there is no language

shift, there are only two possibilities at a particular moment: use is increasing or decreasing. In terms of defining those movements, data can be classified using three factors or criteria (Hornberger 2010):

- a) *Starting point*: we are starting from a position of strength, a medium position, a position of weakness etc.
- b) *Final conclusion*: in processes of language spread, languages end up in a healthier position than before, but without achieving natural intergenerational transmission; or, again, they go beyond that. During processes of decline, languages become weaker than before, but maintain intergenerational transmission; or natural, intergenerational transmission breaks down along with the decline in language use.
- c) *Procedure*: how factors have influenced evolution: in processes of spread, by increases in demographic concentration, by broadening and strengthening socio-functional compartmentalisation, via authoritative *top-down* planning, by RLS-style initiatives. In processes of decline, on the other hand, by physical, demographic or social dislocation etc.

All this, of course, can give rise to extraordinary diversity. Even if we consider only the *final conclusion*, the number of potential alternative situations is vast. For the sociolinguistic processes of spread and decline in general, see Fishman (1991 and 2001); for a summary of their application to the situation of Basque, see Zalbide, Joly, Gardner (2015: 357-358).

As we have briefly examined these three aspects of the direction of change, we will now analyse SHB's approach to structuring the resulting information. Cell 2A contains five second-level labels: basic evolutionary data are labelled *evolution of language use*. In addition to that main section, a further four have also been included: the *type of comparison* can be specified; as can diglossic evolution (*diglossia: yes/no*); *evolution of language use related dominance configuration tables* also have their place, as does the habitual final label along these analytical parameters, *inference*.

### 5.1.1. Type of comparison

What are we comparing with what? In point 5.1. we defined several options and gave each of them a label. Thus, if the comparison is between one moment in time and another, we use the *from moment A to moment B* label. However, if the comparison is between two age groups at the same moment in time, the *between generations* label is appropriate (Broudic 1995: 355-356). In some cases, the evolution of language use can be clearly observed by examining a single

generation: for such cases, the *older people speaking of their childhood* label is used. Fourthly, evolution occurring in two geographical places can be compared, usually at similar historical moments: *between places*. Finally, there is also a fifth option, *other*, in order to label data that does not fit into any of the previously mentioned types of comparison. An event may be the factor behind this “other”: a revolt or a meeting, for instance, the Second Vatican Council, crucial for the religious domain. In such cases, there is one situation before the revolt or council, and another one afterwards.

### 5.1.2. Evolution of language use

The *evolution of language use* label can be used to define the type of change: if language shift has occurred, for instance, which language’s degree of use has increased and which decreased? Or has the language been maintained from one place or moment to another, surviving without undergoing substantial change? Seven options have been foreseen in order to reflect different tendencies occurring in the Basque world, but they can easily be adapted to fit other international situations: *death of language other than Basque*, *increase in the use of Basque*, *maintenance of the (non) use of Basque*, *decline in the use of Basque*, *death of Basque*, *evolution of language use among languages other than Basque* and *general, undetermined*.

In addition, when the text gives us the chance to do so (and, if it does not, we can use the *general, undetermined* label), we will be able to distinguish between the following:

- *Functions*: in which of the language’s functions do the losses and gains take place? (cf. the gains which Basque has had in H function over the last 30 years);
- *Speakers*: what type of gains and losses have there been in the number of speakers? (cf. the gains which the number of Basque speakers has had over the last 30 years);
- *Place*: in which geographical area did the gains and losses take place? (cf. Basque’s retreat in the eighteenth century in Trebiñu, from the south-west to the north-east, or, over the last 30 years, Basque’s spread in areas outside its 19<sup>th</sup>-century borders).

Other variables such as domains, role-relations, age, gender etc. and media, overtness, style etc. can also be marked and underlined for each quotation by using the socio-historical setting parameters and the language behaviour parameters of our sociolinguistic taxonomy (see chapter 2 and 4.1).

So, leaving aside *general, undetermined*, let us examine the other six options, taking these three parameters into account.

#### 5.1.2.1. *Death of language other than Basque*

Let us suppose that the information collected tells us that a language other than Basque has died out in a particular place, which means that in a geographical area linked to Basque a language that was used has disappeared and nobody knows it anymore (Dorian: 1989). In such cases, we use this label. Language death takes into account the disappearance of the language along three different parameters: (*functions*) for instance, the progressive disappearance of Latin from many administrative texts in the Hispanic Monarchies from the 13<sup>th</sup> century; (*speakers*) the last speaker dying (for instance, the last speaker of Gascon in Pasaia village died in the 1920s); (*place*) disappearing from a particular place (Gascon disappearing from the southern Basque Country).

#### 5.1.2.2. *Increase in the use of Basque*

In the second case, Basque is used more and more. In this case, three things can happen: a) Basque spreads as an additional language (*spread of Basque*: for instance, over the last 40 years or so speakers of other languages learning Basque without abandoning their mother tongue); b) Basque substitutes another language in terms of use, i.e. language shift to Basque occurs from another language (*shift to Basque*); c) the use of a language other than Basque disappears (*disappearance of the use of language other than Basque*). As in all the other cases here, change can take place among functions, speakers or/and places.

#### 5.1.2.3. *Maintenance of the (non) use of Basque*

In this case, when comparing two moments or two places, the level of use of Basque has not changed. So this is a long-lasting situation. The label for it is *maintenance of the (non) use of Basque*.

#### 5.1.2.4. *Decline in the use of Basque*

This label is the mirror opposite of the label signalling increased use: in this case, the use of Basque has decreased rather than increased. As with its opposite, it contains a triple distinction: a) the spread of a language other than Basque in a Basque-speaking area (*spread of language other than Basque*), b) another language replaces Basque (*shift from Basque*), c) the use of Basque disappears but it

is not dead because some people still know it (*disappearance of Basque*). When there is not sufficient data to choose one of these options, the *general, undetermined* label may be used.

#### 5.1.2.5. *Death of Basque*

In the same way, this label is the mirror opposite of the first label in this set: instead of the death of languages other than Basque, our topic here is the death of Basque. Intergenerational language transmission has broken down, the continuity of the language from generation to generation has come to an end, Basque has completely disappeared from a place (district, valley etc.): there are no longer any speakers there, nobody even knows the language.

#### 5.1.2.6. *Evolution of language use among languages other than Basque*

Basque has always been amongst the two or more languages involved in the five cases mentioned above. In this last case, however, although there are two languages involved, neither is Basque. In this case, language maintenance, spread, shift or death are to be taken into account but between languages other than Basque. French substituting Gascon in part of the Basque region situated in France – firstly in certain domains and role relationships, later (almost) entirely – is to be included in this section.

#### 5.1.3. **Diglossia**

In line with the structure of cell 1A, those changes in language use can sometimes be seen most clearly from the conceptual perspective of diglossia. The two options under this heading must be correctly interpreted. The *present* label refers to diglossia flourishing during the period of comparison. On the other hand, the *absent* label states the opposite.

#### 5.1.4. **Evolution of language use related dominance configuration table**

Two dominance configuration tables have been given in sub-section 5.1. This label facilitates the location of any such table. These dominance configuration tables are kinetic versions of the dominance configuration table in sub-section 4.1.4. The explanations of the categories used to make the tables up can be found there. The only novelty in these dominance configuration tables is that of comparison. Instead of taking the situation at a single moment or place into account, two ‘snapshots’ are examined, as shown in table 20 and 25.

## 5.2. 2B - CHANGE IN LANGUAGE COMPETENCE

Cell 2B, created in order to store and classify changes in language competence appropriately, has seven second level labels. Data about evolution are basically pigeonholed in one of the following four categories, as already explained when dimension B was introduced (3.1.2): *evolution in speaker's linguistic repertoire*; *evolution of language competence*, *evolution of route to acquiring language competence* and *evolution of route to loss of language competence*. In addition to these main sections, there are a further three: as throughout almost the entire second analytical parameter, one which allows us to define the *type of comparison*, another permitting us to signal an *evolution of language competence related dominance configuration table* and the habitual *inference* label.

### 5.2.1. Type of comparison

The comparison options used by SHB were discussed in point 5.1.1 above, so they will not be repeated here.

### 5.2.2. Evolution in speaker's linguistic repertoire

We are dealing here with the evolution of people's or an individual's linguistic repertoires, their ways of speaking, the repertoire of varieties they use. For further explanation see 4.2.1.

### 5.2.3. Evolution of language competence

This label responds to the question: in what respect has language competence changed? What has changed in the forms of language acquisition and loss? How has the knowledge of speakers changed in each case? To provide the answer, we usually have to make do with generalizing quotations about language competence if the situation we are examining is way back in the past: in many cases, there is little more than a quotation mentioning that they are no longer '*vascongados*' (monolingual Basques). In modern periods, however, we can find more precise information: what level of qualification (even in which language skills) schools and public bodies have given the new generations (sometimes distinguished by gender) at particular times and places.

Five options are foreseen in this evolution of the language competence sphere, with the aim of reflecting the various changes in language competence individuals (and, even more so, groups) can experience. We have kept one of these options, *general, undetermined*, for quotations that are too general and do not fit into other

options, as usual. With the other four options, we take into account the final outcome and direction of the change, just as in cell 2A. We will look at these four options in the following paragraphs. There is also an option in all cases to state in which language the change has taken place (in Basque or in a language other than Basque).

#### 5.2.3.1. *Improving language competence*

Individuals or groups demonstrate greater ability at the second moment a language was measured than at the starting point or moment we use for comparison. Improving the number of speakers who knows the language is also a topic to be included in this cell.

#### 5.2.3.2. *Maintaining language competence*

There has been no change between the two points of comparison. As with use, this can occur with competence, too; in fact, this is what usually happens in most independent healthy speech communities. In general, the situation we are describing is a stable one. Both the quality of the language competence and the number of speakers are included.

#### 5.2.3.3. *Decrease in language competence*

This essential label is a mirror image of an improvement in language competence: here we are concerned with a *decrease in language competence*. An example of this can be seen in the many Basque speakers in previous centuries who, having learned the language at home, left the Basque Country in order to receive tertiary education, in many cases losing much of their ability in their mother tongue or, at the very least, having it weakened. The number of speakers also has to be contemplated in this cell.

#### 5.2.3.4. *Complete loss of language competence*

This case follows the same direction as the previous one, but taken to an extreme. Such individuals or speech communities have completely lost their language competence, not just a part of it, both in quality and in number of speakers.

### 5.2.4. **Evolution of route to acquiring language competence**

This subsection serves to define whether an individual or a community has altered its route to acquiring language competence. In this case, too, we use the

distinction used in cell 1B: we distinguish between *language acquisition via ordinary daily use* and *learning through education*, as well as providing the opportunity to state in which language these natural or formal learning processes have taken place (*Basque* or *language other than Basque*).

### 5.2.5. Evolution of route to loss of language competence

Just as we can examine how a language has been learned, we can also study the opposite process of loss. When we have valid information about how that loss occurred, we use the *evolution of route to loss of language competence* label. As in the previous case, *Basque* and *language other than Basque* can be distinguished.

### 5.2.6. Evolution of language competence related dominance configuration table

Above, in 5.1, we have given examples of the evolution of use related dominance configuration tables. Similar tables can be drawn up with regard to language competence. Here is an example that compares prototypical Basque speakers from three different centuries in macro-perspective. We have to stress, once again, that there are always a few cases that do not fit into these dominant patterns. Likewise, there may be other sets of prototypes in the same period. Be that as it may, the following three cases were the main ones in their time: this makes it very clear what being a Basque speaker meant over different centuries in terms of language knowledge.

**Table 26: Example of an evolution of language competence related dominance configuration table: Prototypical Basque speakers from three different centuries**

Skill	Monolingual Basque speakers, 17th century		Partly bilingual Basque speakers around 1850		Most Basques in 1980	
	Basque	Language other than Basque	Basque	Language other than Basque	Basque	Language other than Basque
Comprehension	Yes	No	Yes	Yes	Yes	Yes
Speaking	Yes	No	Yes	(Yes)	Yes	Yes
Reading	No	No	?	(Yes)	(Yes)	Yes
Writing	No	No	?	?	?	(Yes)

### 5.3. 2C - CHANGE IN LANGUAGE STRUCTURE

In this section, the main topic to be examined is the evolution over time occurring in internal language structure (including in loanwords, toponymy, anthroponymy etc.) and in the language behaviour of bilingual speakers (above all, in interference, code switching etc.). In other words, the comparison of linguistic data which can be obtained from written documentation about moments A and B. Such information has to be gathered if it provides data on the sociolinguistic situation from the sociology of language point of view, whereas linguistic information without sociolinguistic interest falls beyond the limits of the EHS project. *Change of language structure* means here the changes observable at the phonic, lexical, grammatical or semantic planes of the language system, as well as its orthographic norms. There are three labels in the second level of this cell: a) as in the previous two cells on this analytical parameter, *type of comparison*; b) the highly explicit *Data derived from evolution (occurring) in language structure*, with several sub-categories; and, finally, c) *inference*, as usual. In the following paragraph we will examine the main label (b) above); we have already explained the meaning of the other two labels in section 2A.

#### 5.3.1. Data derived from evolution (occurring) in language structure

This label is the crux of cell 2C. We have subdivided it into six parts altogether, following the model of cell 1C (4.3.): *global structure evolution*, *evolution in the result of language contact*, *evolution in internal uniformity of language*, *evolution in power and solidarity indices*, *evolution in significant source (onomastics, paremiology and etymology)* and, finally, *other*. We believe that the label names themselves make the difference from 1C clear: the focus there is on an event at a particular moment, a single *snapshot*; in this case, on the other hand, we are looking at *videos* of changes that have taken place over two or more situations. As the explanations in 1C are quite clear about each of these linguistic concepts, we will not say any more about these subdivisions. For further information, see Zalbide, Joly, Gardner (2015: 371-374).

We have not included the items in our taxonomy, but in this label, 2C, the *way of diffusion of the change* can be included with the subsequent sub-labels: *geographical (site to site)*, *time*, *bottom-up*, *top down*, *word to word*, *other*.

### 5.4. 2D - CHANGE IN SOCIETAL FEATURES

This section looks at the change that has taken place in the social matrix (specific moments and places). The organization of the second level of the cell is two-fold: data on change is collected under the label *Change in societal features*.

In addition to that main section, a further label has been included in this fourth cell on the second analytical parameter: *inference*.

#### 5.4.1. Evolution in societal features

Five basic labels have been created to signal explanations or descriptions of changes in the social matrix: *general, undetermined; demographic process; econotechnical process; political-operative process* and *psychosocial and socio-cultural process*. As the reader will realise immediately, we are very close to the terms used in cell 1D: we have replaced the static *features* used there with a kinetic *process*. The information explained there about each of the concepts linked to the social matrix is suitable here too, but from a kinetic point of view.

### 5.5. 2E - CHANGE IN LANGUAGE ATTITUDES

In this cell, we compare two opinions (or more), attitudes or behaviours which are linked in some way in order to define their evolution.

As is to be expected, the basic organization of this cell shares many features with the other cells along this second analytical parameter (for instance, via the *type of comparison* group of labels and the *inference* option) and with the previous cell on the same dimension, 1E (see, for instance, the organization of the *attitude about what?* subsection).

This cell makes three distinctions on its second level: *type of comparison, evolution of attitude about what?* and *inference*.

*Evolution of attitude about what?* is the main label and, as with cell 1E, it has been subdivided into six aspects, each related to a specific dimension: *language use: A; speakers and their language competence: B; languages: C; ethnicity: D; language attitudes: E* and *other*. As we have already explained the nature of these aspects in 1E, we will not repeat what we said there. For further information, see Zalbide, Joly, Gardner (2015: 379-381). In this field of inquiry, the work done by Lledó-Guillem on the formation of Catalan linguistic identity between the 13th and 17th centuries is inspiring (2018). In that book, the close link between political history, the evolution of language use and the subsequent creation of the linguistic identity is clearly stated and researched on solid theoretical foundations. Many of the concepts of our taxonomy are stressed in this book.

## 6. DYNAMIC PARAMETER

There must be few areas of the sociology of language studied in such breadth and depth over the last half-century as the dynamic parameter. Examining and trying to determine the sources which influence language maintenance and/or language change (or, to put it more precisely, the social factors which may co-vary with language maintenance or change to some extent and, due to this, may serve as indicators of the reasons for the maintenance and/or change) has become one of the most debated specialist areas.

In this section, starting from Fishman's explanations, we will first examine the reasons or sources of language shift or change. With that initial panorama in mind, we will then look at how we have structured this analytical parameter for SHB. We will explain the taxonomy and notation system we have prepared and, lastly, we will define this analytical parameter's five cells one by one.

### 6.0. RELATIONSHIPS BETWEEN LANGUAGE AND SOCIETY

In Fishman's well-known explanation already mentioned in the previous chapter, "[l]anguages and societies are both highly varied (vis-à-vis others) as well as highly diversified (internally). These variations and diversities reveal many patterns or regularities rather than purely random or idiosyncratic manifestations" (Fishman 1968: 6). Moreover (Fishman 1991: 55), "[t]he location of shift in the total 'sociocultural space' of a speech community (...) is an indication of just where the stresses and strains of cross-cultural contact have eroded the ability of the smaller and weaker to withstand the stronger and larger". He also stated clearly: "language and society reveal various kinds and degrees of patterned co-variation" (Fishman 1968: 5). The causal analysis of this co-variation has usually been what the dynamic parameter examines. This is one of the main sections of SHB; it depends on the previous two analytical parameters (descriptive and kinetic) being correctly defined in conceptual terms and systematically documented. As in all areas of scientific research, it is of course essential not to confuse causality and correlation. This is one of the major elements to guarantee scientific rigor (Wardhaugh 1986:14).

In order to examine motives for the *maintenance* and *shift* of Basque (and, in a wider sense, that of languages other than Basque too), it is worth taking all of the possible reasons for language shift into account and then, as far as possible, looking

at all those which have been documented for the Basque case one by one. Let us look, then, at the well-known typology of possible motives for *language shift*.

### 6.0.1. Types of dislocation

We will use Fishman's explanations (1991: 57-65) as our basis for developing this point. We will examine physical and demographic dislocation, subsequently, social dislocation and, finally, cultural dislocation.

#### 6.0.1.1. *Physical and demographic dislocation*

Physical and demographic dislocation is a noticeable reduction in the number, density or concentration of speech community A (or a group A<sub>1</sub> within it), above all, the concentration of speakers falling noticeably and, as a consequence of that, speakers of language A having noticeably fewer options or less need to communicate in language A with other speakers of language A in everyday life. There can be many types of such dislocation. Drawing up a list that may be used to categorize events around the world and on all occasions, Fishman (1991: 57) distinguishes between the following possible types:

- a) Whole populations or parts of them moving, or being made to move, from one place to another: *population transfer* (or "relocation of populations". In the Basque area, see, perhaps, Aiara in the High Middle Ages, Aquitaine in the distant past and the Ezkarai-Oka-Juarros area). There is no shortage of such examples world-wide. See, for instance, the severe, large-scale migrations after the two World Wars (see, for instance, Goebel *et al.* 1997, in particular the chapter about central Europe).
- b) Whether of their own volition or not, the emigration of many speakers and, hence, the demographic weakening of the speech community in its traditional territory: *voluntary or involuntary out-migration, demographic diminution*. In the Basque case, for instance, take emigration to America, substantial from both the North and the South of the Basque Country. There may be other reasons behind this demographic weakening: considerable reduction in the birth rate (in extreme cases, a complete break). There is a clear example of this in the Basque area: in 1977, 41,000 children were born in the Basque Autonomous Community, including native speakers of both Basque and other languages. That number fell to a mere 16,000 within a few years and, in 2011, the figure had not yet reached 22,000 again. The Basques have had one of the lowest birth rates in Europe since the 80's. While the reduction is small-

er, something similar has happened in the neighbouring Autonomous Community of Navarre where a substantial number of Basque speakers live: in 1977, 8,500 children were born and, in 1992, just over 4,500. In recent years, the annual number of births has only passed 7,000 once. The relevant data is available from EUSTAT, INE and IEN.

- c) Population unable to speak the local language arriving *en masse* (see Fishman 1985: 65-67): the “ $B \rightarrow A = B$ ” phenomenon in the Basque case. In fact, two consequences have occurred and been documented in this process: on the one hand, ( $B \rightarrow A = A$ ); and, on the other, its precise opposite, from around 1880 to the current day (occurring firstly in Biscay province and then in Gipuzkoa). An example of the second type is, on the whole, the massive in-migration which took place between 1955 and 1975 in the Basque and Navarrese Autonomous Communities. Several other cases of contact need to be studied: types of bilingualism and monolingualism during the period of the Roman Empire; the Frankish population in Navarre; Gascons on the coast of Gipuzkoa; see, for comparison, the *Sprachinseln* and *Sprachinselnforschung* of the sociology of language in Germany from the start of the last century (up to the time of World War II).
- d) “[S]evere and recurring famines ([...] a thousand years of famines in Ireland)”; [...] natural catastrophes ([...] floods, earthquakes, major temperature changes, droughts and pestilence of man, beasts or crops”. (...) “When this physical basis [of life] is dislocated, the continuity of life itself becomes threatened” (Fishman 1991: 57). Ausonius’ and others’ worries and complaints about not being able to lead a civilized lifestyle (in Latin, in other words) seem to have been of that type in the so-called *saltus* (and even the *ager?*) *vasconum* (Caro Baroja 1945). So, it seems that the non-Basque speech community suffered from *physical and demographic dislocation* during the last period of the Empire.
- e) Destruction: “[W]arfare, genocide, scorched earth policies of invasion or resistance to invasion, slave-hunting expeditions, population expulsion policies [...], soil exhaustion and mineral or forest depletion, and, most recently, toxic poisoning of air, water, soil, plants, animals or humans” (Fishman 1991: 57).

All sources of language change have similar consequences: the total number of speakers of language A, their density compared with that of speakers of language B and, in particular, the demographic concentration of speakers of language A, is weakened, limited, reduced and, in some cases, wiped out. Hence the best-known consequence of demographic dislocation: if you do not have speakers of your language around you, or if you are part of a minority, you will, of course,

need the other language. In Fishman's words (1991: 57): "[the physical or demographical dislocations] leave the remaining populations demographically, socially and culturally weakened via the direct impact on intergenerational mother tongue transmission within the family and neighbourhood [...], or *vis-à-vis* intergroup cultural influences and contacts (via trade, mass media and even aid efforts)".

#### 6.0.1.2. *Social dislocation*

Even without noticeable physical or demographic dislocation, there is a clear cause for *language shift* affecting small, weaker speech communities or groups: social dislocation. Let us call the members of such communities or groups speakers of language X, and those of large, strong groups speakers of language Y. In short, the mechanism of social dislocation is the following: "Xmen who seek social mobility become dependent on Yish society and are not only co-opted into that society, but try to make sure that their own children gain entry into it at as early an age as possible. Dependency interaction (is) a process in which those Xmen who are most like Ymen are the ones most rewarded by the power structure of Yish. (This) *dependency interaction* continually erodes Xish: its demography, its society, and its culture" (Fishman 1991: 60).

In the Basque country, a dependency relationship pattern has prevailed very often among Basque speakers using their own language and non-Basque speakers using the dominant language. This type of interaction has strengthened and promoted a *social dependency relationship* between Basque and non-Basque speakers. Basque speakers have become aware in such circumstances that if they, or those around them (particularly their children) wanted to get on in society, they had to learn the dominant language well, if possible without any trace of a Basque accent, and they had to use it on many occasions. In short: they needed to use the dominant other language if they did not want to live on the margins of society and wanted to get ahead. There are many direct and indirect Basque testimonies about the dependency relationship patterns imposed by social dislocation. When recording such important data, its nature has not always been correctly reflected. See, for instance, Villasante (1988: 166-167) on the difficulties encountered.

#### 6.0.1.3. *Cultural dislocation*

As a consequence of the events described in the previous point, or along with them, certain groups of speakers, or whole speech communities, tend to have increasing difficulty in transmitting their own cultural heritage to the next generation. The capacity for socio-cultural self-regulation is clearly lost, and, as a result of that mass dislocation, what elsewhere is a normal modernisation process leads to mass accul-

turation and culture shift. In other words, the new generations do not, in the harshest cases of trans-ethnicisation, recognise or feel themselves to be the continuation of their predecessors. That cultural dislocation too has been seen as an explicit cause of language shift around the world (Fishman 1991: 62-65), and it is very easy to gather such explanations (usually, doleful complaints) in the Basque case. In Iztueta's work, and in Campion's "El último tamborilero de Erraondo" ("The Last Drummer in Erraondo") (1918), for instance, it could be easy to find clear statements about, and descriptions of, the sociolinguistic consequences of that cultural dislocation.

#### 6.0.1.4. *A phenomenon that involves more than one type of dislocation: urbanization*

All sources of language change are important. Many of them, furthermore, are not completely isolated independent phenomena in themselves: one type of process often causes another (or most others). Let us examine a specific example of this: urbanization.

Physical and demographic dislocation is not, in itself, limited to the procedures listed above (emigration, immigration, low birth rates, natural catastrophes and disasters caused by humans). In addition to these procedures, there is another cause of dislocation which must be taken into account: urbanization. This has often had profound demographic consequences worldwide. In the Basque Country, when the population which had until then lived in a farmstead environment has moved to urban areas, that change in living environment has often had a considerable influence on their way of life. As Fishman states, "Cultures are dependent on familiar and traditional places and products, as much as they are on familiar coparticipants and on an established consensus among them as to cultural values, norms and processes." (Fishman 1991: 58). From then on, they have had to live among people unlike themselves: often they have lived among people who speak another language (and made them do so too). In many cases, this has involved abandoning the customs they had had until then: amongst other things, their custom of speaking in "their own language" all day and every day.

And, of course, this is not the only rupture brought about by urbanization. Moving from farmsteads to urban areas has also often led to profound social dislocation in addition to demographic dislocation. Socio-cultural dislocation has taken place in numerous areas of ordinary life, to a greater or lesser extent: at work, in the way of dividing up the day and the week, in food and drink, in clothes, in leisure and amusement, in many beliefs and opinions, in knowledge and, in general, in world view and, often, in daily speech. From then on, the farmstead people who have moved to urban areas have had to deal with types of people they had not previously been familiar with: in their new neighbourhood,

at work, at school, when shopping, on transport, in new forms of entertainment and at public ceremonies. Along with that, there has often been more intense, frequent communication than previously: there were fewer people to talk with on the farm, almost always the same people, and there was also a more limited number of topics to talk about. All of that, at the end of the day, has led to a specific result: a decrease in, and weakening of, messages reliant on folk knowledge in the language used until then.

In the Basque case, taking into account situations between 1880 and 1980, moving to urban areas has often had the following consequences: speaking Basque less and less, and talking less and less about “intrinsic” subjects, in other words, a decline in ethno-cultural originality. What was already dominant *lingua franca* in provincial cities and larger towns (Spanish in the Southern Basque Country and French in the Northern Basque Country) expanded in these circumstances. As Basque was weakened, languages other than Basque expanded, increased in strength and spread at the former’s expense. Languages other than Basque, the French and Spanish which had been unfamiliar at first to those who had moved to urban areas, made gains not only at school and in the street, but also began to be used increasingly at home, particularly amongst offspring. In parallel, the strong urbanizing movement implied massive demographic movement of population that led to the weakening of traditional rural areas in which Basque was the sole language.

### 6.0.2. How SHB deals with the dynamic parameter

In any case, and while deciding whether to use Fishman’s typology or not, it has been absolutely necessary to take several domestic studies on this topic into account. Fundamentally, and without waiting for the specific, complex questions which will come up later, it has been necessary to identify the manner of giving direct answers to the following questions, integrating them in this methodological framework:

- Why has Basque survived when many neighbouring (and even distant) languages (apparently, used in wider areas and stronger than Basque) have long ago been lost?
- Why has Basque survived in the context of so many people moving to urban industrialised areas? This question is a subdivision of the previous one. However, as this question has been so central from the perspective of the last 200 years, it deserves specific analysis.
- Why was Basque lost in the places it disappeared from long ago?
- Why has Basque been lost where it has disappeared from over the last 200 years?

- Why have languages other than Basque spread (Latin, Romance languages etc.) in the country?
- Why have some languages other than Basque been lost (for instance, Gascon in Gipuzkoa)?

In summary, why does the social configuration of language behaviour change? It would be difficult to find a single unambiguous reason for this. In other countries, too, when this has been attempted unexpected results not covered by the habitual ‘rules’ (or even contrary to them) have often been found instead of wide-ranging confirmation. There is considerable work to be done in this area if real clarification is to be achieved. Without considering the psychosocial processes, the socio-cultural ones (such as the expansion of Christianity, urbanization), econotechnical processes (industrialisation etc.), the political-operative ones (the consolidation and integrative efforts of the two large kingdoms of Spain and France) and the demographic processes (immigration, emigration etc.) which have occurred before, at the same time as, or after, language shift, and without examining and verifying the co-variation phenomena involving those processes on the one hand and language maintenance or shift on the other, it will be difficult for us to attain meaningful knowledge.

Bearing all this in mind, and by tabulating these fundamental concepts, we will now explain how we have structured this third analytical parameter.

#### 6.0.2.1. *Basic explanation of cells on the dynamic parameter*

Table 27 provides a summary of the five dimensions for the third analytical parameter.

Table 27: *Cells on the dynamic parameter*

Code	Standardised term
3A	3A - Dynamics of change in language use
3B	3B - Dynamics of change in language competence
3C	3C - Dynamics of change in language structure
3D	3D - Dynamics of change in societal features
3E	3E - Dynamics of change in language attitudes

We would like to emphasise the importance of the word change once more: basically, this third parameter is constructed from the changes detected on the second parameter. We must be careful, then, not to include all reasoned or motivated factors in this third parameter because SHB is interested only in factors causing language-related changes, not in others. Other types of reasons, justifications and motivations must be classified elsewhere: this is why the Reason for... label, for instance, exists in the first and sixth analytical parameters. So, in the case of the first analytical parameter, when the text before us explains the reason for language use in a given place and time, we use the Reason for 1A label because the text does not provide a reason for the dynamics of language change.

The greatest influence, apparently, is the influence of the social matrix on language events. However, the opposite is also true on occasion: we also have to take social adaptation influenced by language-based events into account, although there will probably be far fewer of them. Likewise, the four dimensions directly connected to language (A, B, C and E) can influence each other mutually, without even needing to refer to the social matrix. The model which we have drawn up is designed to include all these options.

We will give a simple example to illustrate this. When Sabino Arana came up with and promoted a new catalogue of Basque first names 120 years ago (in other words, when he made substantial changes in personal names in the language), he set in motion a revolution in people's names which has spread throughout society quite recently. Basque speakers have made great use of that catalogue and of other lists which have been drawn up since then (such as that of the Royal Academy of the Basque Language). Often, speakers of other languages, including immigrants from abroad, have done the same when choosing names for their children. As we will now explain, in terms of our annotation this is a C>D change in that an innovation in the language has had a noticeable influence on naming customs in society. Although it is an example from fiction, Orwell's "*newspeak*" in his *1984* novel is a prototypical example of that type of influence (Orwell 2018 [1949]: 421-439), in the real world, we can recall Klemperer's work on the propagandistic use and change of language in the Third Reich (Klemperer 1996, Joly 2019, Hartmann 2008, Joly 2021). In the scientific field of language research, this can be linked to the Sapir-Whorf hypothesis (for an up-to-date overview of the question, see Simpson 2019: 311-351). The evolution of social meaning of relevant labels in order to negotiate conflictive situations, for example, can be another example that can fit the C>D, D>C relationship; this has been studied in the field of historical sociolinguistics (Nevalainen & Tissari 2010, Nevala & Sairio 2017).

### 6.0.2.2. *Basic structure of cells on the third analytical parameter*

The internal structure of this analytical parameter is fairly standardised: there are only slight changes in the organization of these cells from one dimension to another. 3D is the only exception: for reasons we will explain later, this cell is not used. The basic outline is reflected in table 28.

As with all other cells, the criteria which SHB has used for its subdivisions are based on scientific norms. In this case, the sources of change included are sociolinguistic. They reflect the main reasons sociolinguists have stressed when trying to understand sociolinguistic evolution. One should bear in mind that most of the authors who have described the sociolinguistic situations in the Basque Country over the centuries have not been sociolinguists. In addition to that, they were (and are) subject to the beliefs and objectives of their time: their (our) ways of thought were (are) those of that (this) moment and, because of that, they may have given fairly unscientific explanations about evolutions. Take, for example, Kardaberaz's belief that Basque had survived because it was God's will (Kardaberaz 2004 [1761:]: 22). Obviously, SHB's matrix does not include in it such reasoning.

**Table 28: Basic structure of cells of the third analytical parameter**

First level label	Second level label	Third level label
	Relationship between dimensions [ = main dimension as recorded in table 31]	[ = the other dimension in terms of table 31]
3A - Dynamics of change in language use	Detailed source of change – D	General, undetermined
3B - Dynamics of change in language competence		Demographic process
3C - Dynamics of change in language structure		Econotechnical process
3E - Dynamics of change in language attitudes		Political-operative process
		Psychosocial and sociocultural process
	Inference	

The way the first label of the cell-internal second and third levels is used is explained in the following subsection, 6.0.2.3: this *relationship between dimen-*

sions set of labels enables us to express the relationships of influence and co-variation involved in change. On the other hand, the second label of the second level, *detailed source of change – D –* enables us to define a) that D dimension acts as agent (not merely as a receptor of influence) or is in a relationship of co-variation; b) within D which parameter or source of change has exercised its influence.

### 6.0.2.3. *How to assign relationships to cells*

When researching the reasons behind the evolution of sociolinguistic situations, the relationships between cause and effect must be examined. However, in many cases that cause-effect relationship is not clear. Morin, for instance, mentions a recursive process whereby the effect becomes a cause. When describing the paradigm of complexity, he mentions the recursive principle (“principe de récursion”) which is related to the cause and effect dichotomy and, in particular, co-variance. According to Morin (2005: 99), “A recursive process is one in which the products and effects are, at the same time, the causes and producers of that which produces them”. It is a spiral that goes beyond the principle of lineal causality. The product, furthermore, is indispensable if the process is to take place: the effect influences the cause and the cause has consequences, and so on. Morin (2005: 99-100) gives the following example: “One encounters the example of the individual, the species and reproduction. We individuals are the products of a process of reproduction that took place before us. But once we have been produced, we become the producers of a process that is going to continue. This idea is also valid sociologically. Society is produced by interactions between individuals, but society, once produced, acts in turn on individuals and products. If society and its culture, a language, an acquired knowledge did not exist, then we would not be human beings. In other words, individuals produce the society which produces individuals. We are both products and producers. The recursive idea, then, is an idea that contradicts the linear idea of cause/effect, of product/producer, of structure/superstructure, because everything which is produced influences that which produces it in a cycle which is in itself self-constituting, self-organizing and self-producing”.

In a later interview, finally, Morin (2008: 249) summarised this idea as follows: “We owe the concept of *retroaction*, which shatters lineal causality by making us conceive of the paradox of a causal system whose effect echoes back on the cause and modifies it, to cybernetics”.

Because of that, and to ensure the viability and usefulness of our methodological proposal, we have preferred a simpler, practical approach: cause and effect are not distinguished, and we look at each dynamic or relationship only once:  $A > C$  and  $C > A$ , for instance, are labelled  $A > C$ ; in the same way,  $B > E$  and  $E > B$  re-

relationships are labelled  $B > E$ . Here is a step-by-step explanation of this approach set out in three tables.

Let us first draw up a list of all the possible types of relationship patterns between two factors or elements, as follows:

- each letter represents one of the five dimensions;
- the symbol  $>$  means that the first element influences the second and
- the symbol  $//$  means co-variation.

In line with this annotation system, table 29 shows forty different potential types of relationships.

**Table 29: Possible relationships between dimensions**

Relationship pattern	Possible relationships between dimensions
Cause-effect relationships	$A > A, A > B, A > C, A > D, A > E, B > A, B > B, B > C, B > D, B > E, C > A, C > B, C > C, C > D, C > E, D > A, D > B, D > C, D > D, D > E, E > A, E > B, E > C, E > D, E > E$
Co-variation relationships	$A // A, A // B, A // C, A // D, A // E, B // B, B // C, B // D, B // E, C // C, C // D, C // E, D // D, D // E, E // E$

How must this notation be read? Firstly, let us take an example of cause and effect. The  $A > B$  notation, for instance, must be read as follows: a change in language use (for instance, a speaker (or group of speakers) speaking Basque less than before) has had an impact on the speaker's or speakers' language competence. As a consequence of that weakening or lack of language use, the speaker(s) is (are) less skilful in the language than previously (for example, in childhood). In cases of co-variation –  $A // B$ , in other words – this must be read as follows: “changes in language use and language competence co-vary”. Clearly, these relationships can be written the other way around without their meaning changing: writing  $A // B$  or  $B // A$  means the same thing as no priority is being expressed. In order to avoid useless repetition, in our formulation, we have chosen to put the letters in each pair in alphabetical order.

Some notes must be given about the forty potential types of relationship pattern to be found in table 29:

- Several special cases have been found in the two types of relation: in the first, an event in a particular dimension influences another event on

that same dimension (for instance,  $A>A$ ); in the other, two events on that same dimension co-vary (for instance,  $E//E$ ).

- $D>D$  and  $D//D$  combinations are also possible and, consequently, they are included in table 29: one social matrix event influences another, or they co-vary. However, during the following phase, we will leave such combinations to one side because they do not have consequences in language: in other words, they are not of any interest (direct, at least) for SHB. So instead of having to take 40 combinations into account, we will be looking at 38.

Let us examine the second table, table 30. We have decided not to take the direction of influence into account and to group relationships by cell in order to simplify the interpretation of the quotations we are working with in SHL.

**Table 30: Ways of labelling relationships**

Cell	Relationships which are taken into account
3A	$A>A, A>B, A>C, A>D, A>E, B>A, C>A, D>A, E>A, A//A, A//B, A//C, A//D, A//E$
3B	$B>B, B>C, B>D, C>B, D>B, B//B, B//C, B//D$
3C	$C>C, C>D, D>C, C//C, C//D$
3D	–
3E	$B>E, C>E, D>E, E>B, E>C, E>D, E>E, B//E, C//E, D//E, E//E$

This table, too, calls for some notes:

- Cell 3D is empty. The reason for this is clear: Dynamics and relationships involving dimension D must of necessity be placed in another cell.
- The number of cases included in each cell is, inevitably, different. In order to assign relationship patterns to different cells, we have used this order of priority: A, E, B, C. This list allows us to put items in order from the (supposedly) most important (and frequent) to the least.

Finally, in order to make the previous tables easier to read, we can group the information in a different manner: distinguishing the two dimensions in each relationship, table 31 can be drawn up to assign these relationships.

Table 31: **Simplified way of labelling relationships**

Cell	Main dimension	Other dimensions
3A	A	A, B, C, D, E
3B	B	B, C, D
3C	C	C, D
3E	E	B, C, D, E

This table does not specify whether a particular relationship is one of cause and effect or of co-variance; the dimensions involved are simply named in the second and third columns. This table provides sufficient precision for our work, in our opinion.

Before going any further, let us stress that we have expanded the approach which appears in the literature about relationships between dynamics and factors in at least four ways:

- That literature, above all, addresses language shift which has been influenced by breaks and ruptures in the social matrix (in other words, it deals primarily with cell 3A). SHB, on the other hand, stresses that those changes in the social matrix are equally valid influences in the other three dimensions (B, C and E) when it comes to listing the causes behind the outcomes.
- At the same time, the outcome of the influence of the social matrix is not necessarily negative for the language: improving the situation (in the known history of Basque this has seldom happened, but there are, in most experts' opinion, some echoes of this) or leaving it as it is should also be taken into account. As the prime focus of literature about the sources of change in the social matrix has been languages or minority speech communities whose situation is worsening, dislocation and rupture have been discussed at length. However, we should not forget that the results of those dislocations have been positive on some occasions: people from Castile went to conquer North and, particularly, South America, and the resulting demographic process helped spread their language to a remarkable extent. The point of view adopted is highly influential when judging whether events are positive or negative: while the language spread in the Americas was

positive for Spanish, it was harmful to Amerindian languages. In the same way, similar demographic processes affecting Basque people in the Middle Ages apparently spread the use of Basque to parts of the Spanish provinces of La Rioja and Burgos. Because of this, from now on we will talk neutrally about processes rather than only about rupture and dislocation.

- Thirdly, SHB also takes into account the cause-effect and co-variance dynamics between the four dimensions with language content in its annotations (A>A, A>B, A>C, A>E, B>A, B>B, B>C, B>E, C>A, C>B, C>C, C>E, E>A, E>B, E>C, E>E, A//A, A//B, A//C, A//E, B//B, B//C, B//E, C//C, C//E, E//E).
- In the same way, even though such cases are exceptional, the influence those language dimensions can have on social phenomena is also taken into account (A>D, B>D, C>D and E>D).

#### 6.0.2.4. *Detailed explanation of sources of change in the social matrix*

Veltman's theoretical formulations and quantitative research (1983), for instance, must be paid careful attention when examining the sources of change in the social matrix in detail. With regard to languages that are in their terminal phases, we have already mentioned Wurm (1991) and Dorian (1981, 1989). Fishman (and several others in the same vein) have dealt extensively with the motives, sources and accompaniments of language shift. When researching the reason for languages' disappearance, Wurm (1991) places social matrix reasons at the heart of the death of languages. He states that the following are the main reasons why languages (in other words, groups of speakers and speech communities) get lost and disappear: 1) the speakers themselves disappearing (death of all users); 2) changes in the language's ecology (changes in the social and cultural context); 3) cultural contact and clash.

In the case of Basque, many Basque language enthusiasts have long linked its decline with the social matrix, rightly so in our opinion. Seber Altube (1933: 801), for instance, explained the reason for the decline as follows: "There are various causes for this retreat or withdrawal [of Basque], and they almost all stem from political and social events, whose origins date long back in the history of the Basque Country".

When dimension D is involved in a particular dynamic (probably in most cases), we have decided to distinguish between five sources of change within it: these five sources of change are the same ones we have already mentioned

in dimension D and, so, we will not explain them again here (for more information, see section 4.4 in this book and Zalvide, Joly, Gardner 2015: 397-400).

## 6.1. 3A - DYNAMICS OF CHANGE IN LANGUAGE USE

The first cell on the third analytical parameter corresponds to the dynamics of change in language use. The second level labels are *relationship between dimensions, detailed source of change – D and inference*. The first two labels will be dealt with in the following sections.

### 6.1.1. Relationship between dimensions

This group of labels has been explained in section 6.0.2.3., to a large extent. As an example, let us now look at all the types of relationships which involve dimension A: A>A, A>B, A>C, A>D, A>E, B>A, C>A, D>A, E>A, A//A, A//B, A//C, A//D, A//E. A is always one of the parts of these pairs; the other can be any element: the second element is marked using labels A, B, C, D and E.

### 6.1.2. Detailed source of change - D

When the reason for the change is linked to societal features, this option makes it possible to specify which of the four fields of societal features is involved. The functioning of the five labels in this group is explained in detail in section 4.4: *general, undetermined; demographic process; econotechnical process; political-operative process and psychosocial and sociocultural process*.

## 6.2. 3B - DYNAMICS OF CHANGE IN LANGUAGE COMPETENCE

This cell is structured in the same way as 3A (there are three second-level labels: *relationship between dimensions, detailed sources of change – D and inference*) and, so, with the differences to be expected, the explanations given in section 6.1. are also valid for this cell.

### 6.2.1. Relationship between dimensions

Let us now look at all the types of relationships which are involved in dimension B: A>B, B>A, B>B, B>C, B>D, B>E, C>B, D>B, E>B, B//A, B//B, B//C, B//D and B//E. Some of these fourteen pairs, however, have already been

taken into account: pairs  $A > B$ ,  $B > A$  and  $B // A$  have already been explained in cell 3A. In the same way, pairs which include E ( $B > E$ ,  $E > B$ ,  $B // E$ ) will be dealt with in cell 3E, so, we will not repeat them here.

As a consequence of all this, only eight pairs of dimensions are taken into account in this cell. They are the following:  $B > B$ ,  $B > C$ ,  $B > D$ ,  $C > B$ ,  $D > B$ ,  $B // B$ ,  $B // C$  and  $B // D$ . B is always the first element in the pair. The second may be from any of the three dimensions *B*, *C* or *D*.

### **6.3. 3C - DYNAMICS OF CHANGE IN LANGUAGE STRUCTURE, 3D - DYNAMICS OF CHANGE IN SOCIETAL FEATURES, 3E - DYNAMICS OF CHANGE IN LANGUAGE ATTITUDES**

As we have used exactly the same system as for 3A and 3B on the other dimensions (3C and 3E), we won't give any further information, all the labels used in those cells are available in the taxonomy in the appendix. For further explanations, see Zalbide, Joly, Gardner (2015: 403-408) and the English version on the Basque Academy's website.

## 7. PROSPECTIVE PARAMETER

The main topic of research in prospective sociology of language is to determine, from the moment the documentary sources are examining onwards over a given period of time (for instance, during the following generation, until fifty years from now etc.), whether an expansion of language use (*language spread*) or a reduction (*language decline, shift, loss, death*) is to be expected, in what places, in which functions and to what extent. In the same way, whether a speaker or group of speakers is expected to increase its competence (or not) in language A or B during their lifetime, whether orally or in writing: this is also what this field of knowledge examines. And also what is to be expected in terms of language change: the spread of the set of varieties of the languages in the future, whether they are headed towards a unified, standard variety or not and, finally, in terms of interference and code-switching, what the main outcomes may be in given relationship networks and domains. In the same way, it examines the type of transformation or change expected in societal features in the future and, lastly, the type of evolution expected in future opinions, attitudes and behaviours about language. All of this may be taken into account by the prospective parameter. In practice, most prospective research at the sociological level is carried out on language use. But, of course, it could also be carried out in the other dimensions.

Although quotations connected with language planning often also examine the prospective level (in order to present the outcomes of a proposal or to strengthen it), they are not, in themselves, to be included in the prospective parameter: such quotations are to be labelled on the prescriptive parameter. On the other hand, if authors explain their predictions for the future before making a planning proposal, these predictions will be included in the prospective parameter and probably also in the contrastive parameter as we will see in the next chapter.

Table 32 provides a summary of the five cells on the fourth analytical parameter.

Table 32: *Cells on the prospective parameter*

Code	Standardised term
4A	4A – Expected future language use
4B	4B – Expected future language competence
4C	4C – Expected future language structure
4D	4D - Expected future societal features
4E	4E – Expected future language attitudes

### 7.1. 4A - EXPECTED FUTURE LANGUAGE USE

The concern in this cell is with the prognosis for language use: the prediction concerning such and such future date. With things continuing in the present direction, what type of language use is foreseen or imagined? At some point in the future (for instance, during the following generation, fifty years from now etc.), whether an expansion of language use (*language spread*) or a reduction (*language decline, shift, loss, death*) is to be expected, in what places, in which functions and to what extent: this, as we have said above, is the main topic of research in prospective sociology of language.

Six second-level labels have been created for this cell: *general, undetermined; without language contact, with some kind of language contact, diglossia, prospective language use related dominance configuration table and inference*. These labels are not developed in greater detail because these kinds of statements are relatively rare in the historical sources so more distinctions are not necessary or would not be useful. The same can be said for the other dimensions of this parameter. A more exhaustive taxonomy could be prepared by making some developments within these labels using the distinctions made in parameters 1 and 2, even if the result would probably be more theoretical than practical. No extensive explanations are required because we have already seen very similar concepts in cell 1A (for further explanations, see Zalbide, Joly, Gardner2015: 410-411).

### 7.2. 4B - EXPECTED FUTURE LANGUAGE COMPETENCE

Prognosis about language competence by such and such future date: if things continue evolving as they are doing in the social sphere, what type of speakers are

foreseen or imagined? What type of language competence, to what extent and for what purpose, will those speakers have? To put it more precisely, looking forward from one particular moment, could a speaker or group of speakers be expected to increase their competence in language A or B? Orally and/or in writing? Could speakers or groups of them learn the language? This is what this field of knowledge examines.

Five second-level labels have been defined for this cell: *prediction about speaker's linguistic repertoire*, *prediction about competence*, *prediction about acquiring competence*, *prospective language competence related dominance configuration table* and *inference*. From what has already been explained (see cell 1B in particular), it is easy to infer what type of information each label will be used for (see Zalvide, Joly, Gardner 2015: 411-413).

### 7.3. 4C - EXPECTED FUTURE LANGUAGE STRUCTURE

This cell includes the group of labels for prognosis about the language's internal structure: by such and such future date, if things continue as they are, what type of internal language structure is expected? Due to a lack of precedents, it is not easy to say what type of results this cell may contribute to SHB. Its contribution will probably be very limited. As a hypothesis, the following questions may be listed: what would the language-internal features be in the future, what is the expected spread of language varieties, is the language heading towards a unified standard or not and, finally, in terms of interference and code-switching, what are the main outcomes likely to be in given relationship networks and domains? Even if these questions are very common nowadays among Basque sociolinguistic researchers, there has been no such interest in historical documents as this type of interference, code-switching and so on has barely existed.

There are only two labels on the second level: *prediction about language structure* and *inference*. The structure of this subcell is a simplified version of cells 1C and 2C as can be seen in the full taxonomy at the end of this book.

### 7.4. 4D - EXPECTED FUTURE SOCIETAL FEATURES

Quotations mentioning expected future societal features are included in this cell. There are only two second-level labels: *prediction about societal features* and *inference*. As in other cases on dimension D, only quotations that are or that may be relevant to sociolinguistic situations need to be included. This is not always easy: when language is mentioned it must be included in another cell, but there must be some sort of relevance to language in order to be included here.

Choice of quotations to illustrate dimension D, in general, is fairly subjective. It is not always possible to foresee whether a social feature will influence a sociolinguistic situation or not. It is usually only possible to know that after carrying out the research. For the sake of prudence, everything should be included here. Practicality, however, requires the opposite: not everything can be. Due to this, a compromise is usually necessary. It is well known, for instance, that changes in econotechnical features, such as new communications, roads and railways, can have a substantial impact on the sociolinguistic situation of areas isolated until then. These kinds of expected changes in future societal features are the ones to be included here.

### **7.5. 4E - EXPECTED FUTURE LANGUAGE ATTITUDES**

This cell includes labels or terms reflecting expected opinions, attitudes and behaviours. It includes the subsections usually included on dimension E, as can be seen in the appendix.

## 8. CONTRASTIVE PARAMETER

This fifth analytical parameter addresses the following questions: where are we heading and where in our opinion (in other words, according to our fancy) should we be heading? Where should we be, and where are we or where will we be if we continue along the same path? How far and in what aspects is there agreement or disagreement between reality (or prediction) and what is desired?

### 8.0. MEASURING THE CONTRAST

This contrastive parameter thus examines whether different speakers consider the *current situation* of a language (and its future projection) *to be to their taste or not*. This fifth analytical parameter contrasts beliefs or desires with the information included in the first, second and fourth parameters. If a substantial difference is found between situation and desire in this contrast, that difference then leads many groups of people to attempt language planning. Information about those efforts, however, is not included in the fifth analytical parameter, but, rather, in the sixth.

#### 8.0.1. Detailed points of contrast

We are going to look in slightly greater depth at the matter of contrast. As seen in the definition given, there are two main items in the contrastive parameter: A: the current description or the prognosis for the future, supposedly objective; and B: the ideal situation for the present or the future.

Let us look at some examples.

A prediction about the future including an explicit contrast can be seen in this example: “if things do not change considerably, in 100 years’ time Basque will have disappeared and that is undesirable; so something must be done for that not to happen”. In this case, the contrast between the foreseen real situation and what the author would like is clear, precise and explicit.

There is “zero contrast”, on the other hand, in this example: “If things carry on as they are now, Basque will disappear in 50 years’ time, and that will be for the best: it is no more than an annoyance”.

There is also an undeniable contrast in the evaluation of the current situation in the following example: “At town council meetings only Spanish is used, and

that is wrong”. The information included in this cell often also provides other information about the sociolinguistic situation. Because of that, the information needs to be included in other cells too. In this example, for instance, the quotation gives information about use (and hence should also be included in cell 1A): Spanish is used in council meetings. For further explanations, see Zalbide, Joly, Gardner (2015: 420-421).

### 8.0.2. Cells on the contrastive parameter

Table 33 provides a summary of the five cells on the contrastive parameter.

**Table 33: Cells on the contrastive parameter**

Code	Standardised term
5A	5A - Language use contrasted with ideal
5B	5B - Language competence contrasted with ideal
5C	5C - Language structure contrasted with ideal
5D	5D - Societal features contrasted with ideal
5E	5E - Language attitudes contrasted with ideal

### 8.1. 5A, 5B, 5C, 5D, 5E. STRUCTURE OF CELLS ON THE CONTRASTIVE PARAMETER

From what has been explained until now it is easy to infer what information is to be classified in each of the cells (for a more detailed explanation, see Zalbide, Joly, Gardner 2015: 422-431). Concerning the internal structure of the cells, there are two main subsections: *problematic* and *unproblematic*. The names are self-explanatory and the complete list of terms of this parameter is available in the taxonomy at the end of this book.

## 9. PRESCRIPTIVE PARAMETER

The prescriptive parameter serves to classify quotations related to language planning. It is a fundamental concept of the taxonomy for SHL. Initiatives in favour of and against language status, acquisition, corpus and identity planning that allude to Basque are classified in this section. We include both the initiatives in themselves and preparations for them, and the structures, institutions and so on for carrying them out: congresses, conferences, meetings, courses, publications (for this classification, see, amongst others, Paulston & Tucker 1997). This parameter is not at all new worldwide in academic terms. The many definitions of language planning which have been given include the following two: “Language planning involves deliberate, although not always overt, future oriented change in systems of language code and/or speaking in a societal context” (Rubin & Jernudd 1971: 216). Fishman (1973: 24-25), on the other hand, defines language planning as “a set of deliberate activities systematically designed to organize and develop the language resources of the community in an ordered schedule of time.”

Table 34 provides a summary of the five dimensions for the sixth analytical parameter.

Table 34: **Cells on the prescriptive parameter**

Code	Standardised term
6A	6A - Language status planning
6B	6B - Language acquisition planning
6C	6C - Language corpus planning
6D	6D - Planning for societal features
6E	6E - Planning for language attitudes

- Cell 6A includes what is normally called *status planning* (both top-down planning organized or supported by the authorities, and also bottom-up planning, including RLS);

- Cell 6B includes what has been called *acquisition planning* after Cooper (1989: 33);
- Cell 6C includes what is usually called *corpus planning*;
- Cell 6D includes something which does not have a standard name but which authors like Fishman, Eastman (1981) and Pool (1979), either partially or in its entirety, have occasionally called *identity planning*.
- Lastly, cell 6E includes language planning for language attitudes, which is also at least partly connected with prestige planning.

Great efforts have been made to keep the same internal structure from one cell to the next. Given that similarity, we will only explain 6A here, including its subsections. For 6B, 6C and 6E, we will offer briefer explanations (for more detailed explanations, see Zalbide, Joly, Gardner 2015: 434-469).

## 9.1. 6A - LANGUAGE STATUS PLANNING

In language status planning are included the set of strategies designed, measures taken, and evaluations carried out (whether for specific domains or all of them) to render the use of one language or another compulsory, or to strengthen, maintain, limit or prohibit them.

To be able to classify all such material appropriately, ten second-level labels have been created in this SHB cell: *socio-philosophical underpinnings, degree of overtness, goal of language planning, stage of language planning, actor, directionality: top-down/bottom-up, target group, opinion on language status planning, reason for 6A and inference*.

### 9.1.1. Socio-philosophical underpinnings

The reasoning forming the basis for language status planning is the subject of this label. There are basically three main attitudes with regard to a weakened language: a) letting it get weaker and weaker and, finally, letting it die out; sometimes even encouraging that process; b) while not being in favour of the language's disappearance, avoiding taking any measures for or against it; c) being in favour of measures to reinvigorate the weakened language and trying to carry them out. All three attitudes usually have their basis in ideologies outside the language itself. Where there is a desire to influence language use, whether in favour of the language or against it, the ultimate reason for that is not normally purely linguistic: in most cases, that effort is derived from the beliefs and opinions of the

whole or part of society. When the question “What is language planning for?” is addressed, we often hear mention of the social matrix, of definitions of ethnicity and of the will of the people, and, sometimes, of the “objective advantages” of political integration.

Fishman (1991: 451-465) underlines the need to define those socio-philosophical underpinnings explicitly: in his words, *ideological clarification* is needed. He believes that people who want to increase the use of language should clarify and make explicit the reasons behind their efforts. On the one hand, certain arguments need to be rejected (such as socio-philosophical underpinnings opposed to RLS): for instance, the belief which says everything must be evaluated on purely economic criteria; the belief that it is natural for minority languages to die out; the belief which holds that all RLS efforts are disruptive; the belief that patriotism connected with RLS work is worse than that connected with the neighbouring dominant language; the belief that a single language is sufficient for each state, etc. On the other, he believes that several arguments in favour of RLS should be reinforced: that the members of a speech community can only count on their own strength; concerning intergenerational language transmission, that a *Gemeinschaft* type of society is of greater help in satisfying people’s day-to-day needs than a virtual community; lastly, that the state controlled by speakers of language Y should for many reasons be restyled as ‘one state, many cultures’.

### 9.1.2. Degree of overtness

In connection with the creation of modern sociolinguistics in the 20th century, there are many well-known texts about language planning from the second half of the century (Haugen 1966, Ferguson 1968, Tauli 1968, Neustupný 1970, Jernudd & Das Gupta 1971, Rubin 1971, Garvin 1973, Fishman 1973, (ed) 1974, Eastman 1983, Cooper 1989, Kaplan & Baldauf 1997, etc.). Language planning, which is also called applied sociolinguistics and has many synonyms (language engineering, glottopolitics, language development, language allocation, language management, etc.), in general, normally has specific aims for a specific period, for instance helping in the choice of national language in new states undergoing decolonisation and, in general, carrying out corpus planning for the chosen language, working on status planning for the language to leave the colonial language to one side, etc. In Eastman’s view (1983: 110), from its beginnings in the middle of the 20th century until the 1980s, there were different stages in language planning: “Thus, during LP’s twenty-year history the orientation moves from seeing planning chiefly as a tool of standardization (1935-1959), to seeing it as the study of language problems and their solutions (1960s), to the study and practice of managing language change (1970s), to an awareness that is necessary to evaluate

language change, given the nature of the context in which it occurs (multi-ethnic, supranational, and the like)". There can be many reasons for initiating language planning nowadays too: in order to limit the influence of the English language (or the other way around: policies to promote knowledge of English on account of the language's economic importance), reviving local languages, etc.

All of these types of language planning are connected with the applied sociology of language. *Direct planning* includes cases where the promoters of the planning have some specific aims for the language, and the language is their main, specific objective (although there may be some other aims behind them). Four of the five dimensions in the SHB model are connected with the most frequent types of direct language planning: 6A, planning for the language's use or status; 6B, planning for language competence and acquisition; 6C, corpus planning; and 6E, planning for attitudes towards and opinions about the language.

We should bear in mind, however, that the reasons for influencing the language's social configuration may be direct or indirect; Kaplan and Baldauf emphasized this dichotomy by using the terms "Planned vs. Unplanned Language Change" (1997: 297-299). In the case of Basque, one thing is *direct planning for Basque* (the direct efforts of Basque language enthusiasts to keep the language alive, or those of people preferring a language other than Basque to limit or destroy its vitality) and another, even though the initiatives and results are often very similar, *indirect planning for Basque* (for instance, the Church publishing catechisms in Basque – or, often, in bilingual editions – to communicate the sacred Gospel to Basque speakers): in such cases, language planning is in the service of something else, or is connected with managing the outcome of a pre-existing sociolinguistic situation. Taking all the above into account, direct planning is one thing (in other words, planning whose principal aim is to influence the language) and indirect planning is another (although the language itself is not the final objective of the planning, societal initiatives, in one way or another, planning in one field or another, have a notable influence on the language).

A further distinction can be made within these two labels based on outcomes. Direct planning may have positive consequences or not. The same is true of indirect planning. This is summarised in table 35.

**Table 35: Degree of overtness and outcomes of language planning**

Indirect planning	Positive outcome	Basque
		Language other than Basque
	Negative outcome	Basque
		Language other than Basque
Direct planning	Positive outcome	Basque
		Language other than Basque
	Negative outcome	Basque
		Language other than Basque

### 9.1.3. Goal of language planning

The information which clarifies the objective of that language status planning is the next object of consideration. It is possible to see a whole gradient or cline of objectives there, from working in favour of the chosen language (perhaps all speakers being obliged to use it) to opposing it (perhaps to the extreme of forbidding its use). In order to reflect these choices of aims correctly, SHB has created a total of eight third-level labels: *general, undetermined; requiring use; increasing use; maintaining use; compartmentalizing use; limiting use, prohibiting use and other*. In each case, it is possible to specify the language or languages involved: *Basque or language other than Basque*.

As with other parameters of our taxonomy, small changes or a more complete version can be made linked to each particular sociolinguistic situation. For example, here, items like *authorising use, allowing use, or maintaining use* can be included.

### 9.1.4. Stage of language planning

This section reflects the implementation stages (Haugen 1966b) of the strategies and detailed policies which have been drawn up and put into practice in order to change the level of use of a language or languages.

With regard to the stages or phases of language status planning, we have used Haugen's initial model as our starting point: in other words, *norm selection*,

*codification, implementation and elaboration* (Haugen 1983: 269-289; 1987). To that set of four, we have added *evaluation*, as most experts have considered it to be an indispensable component.

- a) *Norm selection*: what place was to be given to Basque at a particular time and place? We know that over the centuries there have been different approaches with regard to this point, even amongst Basque language loyalists. The main choice to be made was perhaps expressed in its crudest form about a hundred years ago (see Urquijo 1920: 15). The two extremes among Basque language enthusiasts were distinguished there: should complete demographic and socio-functional spread be assured for Basque, or, alternatively, was it worth maintaining the last remnants of the diglossic situation of times past? As Urkixo (1920: 15) puts it, for instance: “If the Basque people is determined to use all possible resources to prevent the decline and death of its ancient language, should it limit the language to being the exclusive heritage of the lower echelons of society, as it has done until now, neither including it in education nor encouraging its literature? Even leaving aside all sentimental reasons, the need to convert Basque into a language of culture is the logical consequence of the desire to conserve it: all linguists agree that where a language of civilization fights against a language which has been restricted to use by the raw people and which is not cultivated in literary terms, the former ends up overcoming the latter. This is so much so that in our country, while Basque is giving way to the advances of Spanish, a language of civilization, the Basque border with Béarn remains stable because it does not really border on French itself there but, rather, on a patois, which is of the raw people and not literary”. It is interesting to compare this statement to those of Mitxelena (1951) and Kloss (1952). We can also see Antonio Tovar’s position in favour of positive intervention (Tovar 1980). So it is no surprise that norm selection should open the way to the next step.
- b) *Codification*: sooner or later, an operational definition established by one or other decision-making body in the social sphere is made known, defining what, when and how things are required to be done with regard to the use of one language or another in a precisely defined domain or territory. In modern societies, some legal norm usually reflects such decisions when they have been taken by politicians. The Church, or some other authority with the power to do so, has also taken such decisions throughout history, for instance, about whether to teach the catechism in Basque or Spanish in the Southern Basque Country.

There is, in fact, considerable documentation on this topic in the Basque country, waiting to be collected and structured: among all the sources, the *Euskera* journal provides the most information.

- c) *Implementation*: specific measures to strengthen or limit the use of a particular language are usually examined under this heading.

When it comes to implementation, there is a huge tendency to look to the school, but a language's advances and retreats take place in many different spheres, not particularly in the world of education, and this was the case in the past too. Implementation measures from domains other than education, both those in favour of Basque and those in favour of languages other than Basque, must be examined equally under this label.

- d) *Elaboration/cultivation*. The measures imposed usually have to be developed in many different ways if the outcomes desired are to be achieved or, at the very least, if the actual situation at a given moment is to be nudged towards those outcomes. That type of elaboration is usually made up of individual micro-planning measures.
- e) *Evaluation*. Language status planning (and, in general, the whole of language planning) is a task which, in itself, is unending, recursive. It is a process that is always being repeated, while the agents involved are at the same time learning from past mistakes. There is usually some type of evaluation that leads us to distinguish between failings and achievements. This is what the evaluation stage consists of. This section aims to provide information about evaluation work, carried out explicitly or implicitly, throughout history on plans for the use of Basque and languages other than Basque. There is considerable evidence on this from the end of the 19th century and the beginning of the 20th century providing information about implicit and explicit evaluation work.

Taking all the above into account, SHB has decided to distinguish between five categories altogether in the planning stage: *general, undetermined; planning proposal; norm selection; implementation of status planning and evaluation of status planning*. *Planning proposal* deserves a special mention: Haugen does not mention it and, in general, it is not mentioned in the international literature. In the Basque Country, however, over the last few centuries, there have been many planning proposals, intentions and desires which have not been carried out (or have been so only to a modest extent) and so we have considered it appropriate to create a specific category. In such cases, proposals have gone beyond the contrastive or evaluative perspective (fifth parameter in our taxonomy). The propo-

ment of the measure has clearly stated the way to solve the problem or contrast observed. But the proposal has not gone beyond being a proposal. *Norm selection* includes two of Haugen's categories: *norm selection* and *codification*. Likewise, *implementation of status planning* includes his *implementation* and *elaboration*. Finally, the *evaluation* category corresponds to the definition given above.

### 9.1.5. Actor

The actors of language planning can be varied, normally one of four kinds: *authority*, *individual*, *organized group* and *other*. These concepts, which are also the labels included under this heading, are closely related to those mentioned in the following paragraph: normally authorities have carried out top-down language planning, and individuals or organized groups bottom-up planning. However, the distinction may be useful in many cases.

### 9.1.6. Directionality: top-down/bottom-up

Three concepts are included under this heading: *bottom-up planning*, *top-down planning* and *other*. Both these terms were coined by Kaplan and Baldauf (1997). *Top-down* planning is carried out by formal bodies with the authority to mould (to facilitate or compel the use of a language, or to restrict or forbid it) the internal structures (and the spelling) of a language, and by whom, when and to what purpose it is used. The attempt to transform the internal structure or external life of a language without relying on specific formal authority in the social hierarchy of a particular place constitutes *bottom-up* language planning. This is the sort of planning individuals and more-or-less organized social groups without formal powers carry out. Usually, such individuals and social groups do not have executive or legislative powers to pursue their objectives. But authorities with power may decide to take their will into account as a result of those individual and group efforts and their capacity to attract the support of an ever-increasing mass of people. In research into language variation, the latter is linked with *change from below* and the former is related to *change from above* (Labov 1994: 78). Of course, a change in a language may or may not be the consequence of planning. So, the last two terms just introduced may or may not necessarily be connected with planning.

### 9.1.7. Target group

In all forms of planning the following question, too, is usually important: who is the planning intended for, for which target group(s)? How can we define the audience aimed at? Many different criteria are possible, and that is what the nine options under this heading attempt to reflect: *whole population*; *group de-*

*fin*ed by profession; group defined by ethnic features; group defined by language; group defined by territory; group defined by individual criteria; group defined by age, group defined by gender and other.

### 9.1.8. Opinion on status planning

Opinion about status planning proposals, execution and outcomes. In order to label detailed evaluations of particular policies, we use the *evaluation of status planning* term explained in section 9.1.4.

### 9.1.9. Reason for 6A

The *Reason for 6A* label is similar to the *Reason for 1A* one: sometimes, as well as presenting a status planning event, a quotation also tells us the reason (supposed or real) for it. This label, then, points to the existence of that reason.

We want to distinguish the use of this label from that of socio-philosophical underpinnings explained in section 9.1.1: when the aim is to explain the underlying causes of an entire status planning programme, that other label should be used.

According to the point of view of the research, all SHB's analytical parameters could potentially be applied to language planning. Mikalayeva (2013), for instance, published an article entitled "Principes de la politique linguistique. Etude comparée de la Révolution Française et de la Révolution d'Octobre" ('Principles of language policy. Comparative study of the French Revolution and the October Revolution'). The article's objective was to examine the continuity and the rupture of the ideological basis for the language policies which were implemented during those two revolutions. In such an article, of course, language policy (sixth analytical parameter), the evolution of that language policy (potentially the second analytical parameter) and its ideological features (potentially the fifth analytical parameter/dimension E) are mentioned. However, this kind of information is fully linked to the sixth parameter in this particular case.

## 9.2. 6B - LANGUAGE ACQUISITION PLANNING

Language acquisition planning consists of the strategies, policies and achievements which are designed and implemented to strengthen the language competence of an individual, a particular group of speakers or an entire speech community. Cooper (1989) created the term *acquisition planning* to be able to give language acquisition its own place among the sorts of language planning.

Alongside this, it is also possible to make a language or some languages a subject of study or a teaching medium (or not). Evaluations of and opinions about acquisition planning are also included in this cell, not in 6E. Planning for language use not directly concerned with acquisition, on the other hand, is classified separately in cell 6A. Examples of this topic in the social history of languages include, for instance, “Towards a historical sociolinguistic account of language-in-education policy in the German-speaking community of Belgium” (Boemer & Darquennes 2012) and an article examining the language education of women in the 17th and 18th centuries (Fernandez 2011).

This cell aims to deal with attempts to teach Basque speakers other languages (mostly at school) or vice-versa, or to make Basque speakers literate in their own language. In the Basque case, there is very substantial documentation on this topic, hence establishing an appropriate cell structure is essential. The perspective developed by the sociology of bilingual education from the 1970s onwards is the basis for this initial approach.

In order to be able to organize all the material on this topic appropriately, taking into account the concepts linked to this topic in the international bibliography, ten second-level labels have been created for this cell: *socio-philosophical underpinnings*, *degree of overtness*, *goal of language planning*, *stage of language planning*, *actor*, *directionality: top-down/bottom-up*, *target group*, *opinion on acquisition planning*, *reason for 6B* and *inference*. As we have already explained similar concepts in 6A, we will not repeat those explanations here: we will only present the details which vary, relating to the objectives of language acquisition planning.

### 9.2.1. Goal of language planning

Three kinds of information are taken into account in dimension B: a) data about language planning dealing with the linguistic repertoire of speakers, b) data about language proficiency requirements (for instance, where language profiles or qualifications are compulsory; for example, the indispensable condition in the past of being able to speak Spanish in order to be a member of the provincial assemblies of Biscay and Gipuzkoa) and, c) data about language acquisition planning per se (at school or from everyday life). To reflect this distinction, three sets of labels have been created: *planning of speaker's linguistic repertoire*, *language proficiency requirement* and *language acquisition planning*. Information about language qualifications is included in the first set and information about schools / educational planning (curriculum) in the second.

### 9.2.1.1. *Planning of speaker's linguistic repertoire*

As speaker's linguistic repertoire can be the goal of language planning, this cell was created to classify such information.

### 9.2.1.2. *Language proficiency requirement*

We can differentiate between three levels of requirements: Basque or another language being *required*, *preferred* or *not considered*. These three levels of requirements may be connected with professional life and, if so, we can speak of a compulsory requirement in the first case, of merit in the second and of an absence of requirements in the third. Different types of exams and forms of evaluation for measuring specific language achievements are hence included in this cell. We also include the usual term *other* for those cases that are linked to the subject of this cell, but are not reflected in one of the three possibilities we offer in our taxonomy.

### 9.2.1.3. *Language acquisition planning*

Language acquisition planning defines the type of speakers the planner wants to produce: on the one hand, the type of speakers of languages other than Basque (marked with the *language other than Basque* label), and, on the other, the type of Basque speakers (marked with the *Basque* label). We understand language acquisition planning as defined by Cooper (1989). Acquisition of the language levels mentioned is to be achieved through formal education or through activities in ordinary daily life. SHB has distinguished eight different objectives in this area, in line with those specified for language status planning: *general, undetermined; requiring acquisition of language competence; increasing language competence; maintaining language competence; compartmentalizing language competence; limiting acquisition of language competence, impeding acquisition of language competence* and *other*. In this section, too, a cline or gradient can be observed in the different aims, all the way from working in favour of the chosen language, perhaps using compulsion, to acting against it, perhaps even forbidding it. Of course, these two extremes are connected: if the use of one language is forbidden, in practice another is being imposed.

## 9.3. 6C - LANGUAGE CORPUS PLANNING

We include strategies and policies designed and implemented to manipulate the language itself in this *language corpus planning* section. Evaluation of corpus planning and opinions about and attitudes towards it are also included in this cell, not in cell 6E. Often, in historical terms, language corpus planning has been re-

lated to some political aim. Boyer and Gardy (2001: 12) describe this connection in the case of France (about this point see also Lodge 2014: 216-217):

It is clear that French and its *exclusive legitimate* use have been jointly connected with the State ever since its entry into the modern period. The political-administrative unification of France was unquestionably based on a *single, unified* language and it was not mere coincidence that the Académie Française was founded by Richelieu in 1635; it was, in fact, precisely in the 17th century, the Golden Age of the state of Absolute Monarchy, that the unique phenomenon of the “*locking down*” of *grammatisation* made its appearance: a linguistic ideal (highly restricted from a sociological point of view) tends to fossilize and one sees that *authorised* writers set up the religion of a French language which, it was written at the time, had reached “its highest point of excellence” (Peletier du Mans, 1549). From that point onwards, everything seen as a threat to the language’s perfection will be refused and rejected *on principle*.

This cell includes the whole field of language corpus planning. It is a cell that is well stocked in the socio-historical evolution of Basque, above all from the 18th century onwards. To include the whole of that evolution and structure in a way that is of use to SHB, we have had to choose one of the many formulations given for corpus planning. Our proposal has been to use Einar Haugen’s model (1983) and adapt it to the needs of SHB, as we have done for language status planning. So, as a first approach, we have used the following well-known sequence: *norm selection, codification, implementation and elaboration*.

In the field of codification, special attention has to be paid to the creation of the literary dialects of Basque, emphasising the socio-institutional factors involved in each case (not infrequently, bishoprics or local Church authorities). For instance, the mixed written Navarrese-Lapurdian variety requires specific examination. The same can be said of the search for unity and strengthening of written Biscayan.

In any case, efforts in pursuit of the unity of the whole of Basque will take up most space in this cell.

We should point out that the extensive fields of the *implementation* and *elaboration* sections will have to be examined with particular attention by SHB. We have access to substantial material on them, which has to some degree already been structured.

We are aware, lastly, that this fourfold structure means that some aspects which have been essential in the Basque case (and still are, such as translation and Ferguson’s related concept of *intertranslatability*, in particular) would get left out; we have considered it appropriate to include them in this field of *corpus planning* too.

With regard to the bibliography, there is an extraordinary series of sources in this area, both in the Basque country and internationally.

Taking all of the above into account, we have organized this cell as follows: ten labels are distinguished at the second level of labelling, basically following the distribution of cell 6A: *socio-philosophical underpinnings*, *degree of overtness*, *goal of language planning*, *stage of language planning*, *actor*, *directionality: top-down/bottom-up*, *target group*, *opinion on corpus planning*, *reason for 6C* and *inference*. As with cell 6B, only those aspects of the terms which differ substantially from the descriptions given in 6A are discussed in the following paragraphs.

### 9.3.1. Socio-philosophical underpinnings

Reasoning which provides information about the basis for corpus planning is the subject of this label. Basically, there are two attitudes towards the corpus planning of a minority language: on the one hand, efforts to distance the language's configuration (and its graphization) from that of neighbouring languages, using as a source for new words one's own language (language purism – see, for instance, Langer & Nesse 2012) or sources those other languages do not use (cf. *Sprachausbau*). On the other hand, some corpus planners try to bring the language closer to those surrounding languages, for instance by using Greek and Latin sources for new scientific words. In the Basque case, both attitudes usually base their justification on factors outside the language itself, related to societal features, and both can be exemplified to a degree from actual practice.

### 9.3.2. Goal of language planning

As in 6A and 6B, SHB has tried to distinguish the typical objectives of corpus planning too: *general, undetermined*; *purifying language*; *naturalising interference*; *standardising language*; *language codification*, *developing intertranslatability*; *language cultivation*; *Abstand/Ausbau* and *other*. Ignoring the first and the last of these for the moment, the other seven labels are discussed in the following subsections. We add the *Basque* and *language other than Basque* labels in all cases.

#### 9.3.2.1. Purifying language

This label is used to signal policies and strategies designed and implemented to 'purify' the language itself, in other words, to weaken the influence of other languages. This behaviour is often called purism.

### 9.3.2.2. *Naturalising interference*

This label marks strategies and policies designed and implemented to strengthen the influence of other languages on a language or, at least, to bring them closer to, and make them fit in better with, the forms of the language being influenced.

### 9.3.2.3. *Standardising language*

This label is for strategies and policies designed and implemented to standardise a language. This standardisation can be mononuclear (cf. French) or polynuclear (cf. English: American English, British English, Indian English etc.). With regard to Basque, it can be used to mark efforts to develop and pursue acceptance for Standard Basque (*batua*) during the 20th century. The final goal of a language standardisation project has not to be linked only to communication needs: it is usually linked to a national project and ethnicity planning. In the Finnish case, for instance, Nordlund & Pallaskallio (2017) claim that “language was seen to be central in the national project that aimed at creating the Finnish nation”. That kind of information is linked to planning underpinnings, reasons for planning and the place of language in the ethnic configuration (for another geographical context in the field of historical sociolinguistics see Hawkey & Langer 2016).

### 9.3.2.4. *Language codification*

We are referring here to the strategies and policies designed and implemented to influence the internal character of a language. Language codification and normativisation deal with research carried out and decisions taken on the way to define a unified literary language. Standardisation is a broader concept and implies that the norms have to be known, liked (or at least taken on board), learned and used. The gap between norms and language use has been stressed widely in the field of historical sociolinguistics (for instance Rutten *et al.* 2014). The degree of standardisation is often different depending on social variables. In the case of Basque, age, geographical area, work and educational level, ideology and maybe gender seem to be the most relevant.

Haugen (1983: 271) divided up evidence about the codification process into three subsections:

- *Graphization*. “Choosing”, developing and defining a writing system that is appropriate to the correct use of the language. Work in pursuit of a Standard Basque spelling reflects a rich socio-historical perspective, as Zuazo (1988) has explained with clarity, and there is further research to be done in gathering documentation relevant to SHB.

- *Grammatication*. “Choosing”, developing and defining grammar that is appropriate to the correct use of the language. This field must be worked on without losing sight of socio-historical perspective. Initiatives in both the Northern and Southern Basque Country from the 18th century onwards need to be taken into account. Within that perspective, works such as *Euskal-izkindea* (Azkue 1891) are of particular importance. The question is not to what extent that proposal was authentic or correct, but, rather, what social objectives was it based on and what were the innovations in societal life his initiative brought about. In this regard, there is an extraordinary wealth of documentation on grammatication initiatives that can contribute to SHB, much broader, in fact, than what is usually taken into account.
- Finally, *lexication*, or the selection of an appropriate lexicon, must be examined. In this field, too, there have been numerous initiatives in the Basque Country and, in some cases (in the *Diccionario Trilingüe* – Larramendi 1745 –, for instance), the contribution to social history is extraordinary: a reading of his extensive foreword is sufficient to realise that.

In line with Baldauf (1989), it seems appropriate to add *pronunciation* to the previous trio in the case of Basque too.

So we include five distinctions within this field of codification: *graphization*, *grammatication*, *lexication*, *pronunciation* and *other*.

#### 9.3.2.5 *Developing intertranslatability*

Strategies and policies which are designed and implemented to develop a language, above all, but not only, in lexical terms, so as to make it capable of expressing clearly, in an easily understood manner, and without excessive recourse to periphrasis what is written in another language: this, very briefly, is *intertranslatability* (Fishman (ed) 1974: 10-11). So quotations that address this process are given the *developing intertranslatability* label.

#### 9.3.2.6 *Language cultivation*

This label has been created to signal strategies and policies for designing and implementing the language cultivation of subvarieties of a language, for example, by developing discourse types and dictionaries for specific fields of learning.

### 9.3.2.7. *Abstand/Ausbau*

With regard to the language corpus, planned distance or proximity between the neighbouring large, strong language and the small, weak language is given this label (Kloss 1952). An *Abstand* language is naturally distant from another language: because of its features, there is no great risk of it being mixed up. An *Ausbau* language, on the other hand, thanks to the way of development it has chosen (for instance, by taking new words from sources which the neighbouring language does not use, constructing a very different writing system etc.), tries to distance itself from that other language. However, things are not always black and white. Although Basque is a prototypical *Abstand* language in genetic terms, some people have carried out *Ausbau* work on it, particularly where drawing from the word store of neighbouring languages in various spheres has been considered something negative. When the distance between two languages is intrinsic rather than planned, the *interlinguistic distance* label is to be used (depending on the case: see 1C, 2C or 4C).

## 9.4. 6D - PLANNING FOR SOCIETAL FEATURES

Strategies and policies designed and implemented to change any aspect of the social matrix, in particular those established with regard to *identity planning*, are to be included in this cell. Evaluation of planning for societal features as well as opinions, attitudes and behaviours related to planning for societal features are also included.

In summary, leaving language issues to one side, the questions to be resolved here as part of that social planning process are: in terms of its sociocultural configuration, what type of society is imagined, what type of relations are to be established with entities above (at state or continental level) or below (whether agreement on formulas of integration and mutual guarantees are to be pursued or not)? In the past, ethnicity, and at the present time, ethnicity and nationalism, will probably have to be taken as items for research into this aspect. The main subsections of this cell are the usual ones on this parameter: *demographic features*, *econotechnical features*, *political-operative features*, *psychosocial and sociocultural features*. The remaining subsections are ones that we have already mentioned for the prescriptive parameter (for further explanations, see Zalbide, Joly, Gardner 2015: 463-465).

## 9.5. 6E - PLANNING FOR LANGUAGE ATTITUDES

Strategies and policies which are designed and implemented to influence opinions and attitudes towards language are included in this set of labels, as well

as opinions and attitudes towards those strategies and policies, what Fishman sometimes called *identity planning*. When examining 6D, we have mentioned that *identity planning* must be included there. Identity planning related to language is included in 6E, and that which is not, in 6D. The identity planning which aims to clarify what a Basque speaker is and is not is a special case: historically, an ‘euskaldun’ seems to have been a person who spoke Basque, so if in defining that term other characteristics are given priority (for instance, race, birthplace, etc.), the role of the language itself is reduced. In this regard, even though the language is not mentioned, quotations on this particular topic often deserve inclusion in 6E. Cell 6E includes the habitual subsections on the prescriptive parameter, and the goals of language planning are linked to the usual divisions of this dimension.

With this parameter linked to language planning, we reach the end of the main presentation of our proposal for a taxonomy of historical sociolinguistics which allows for the classification of quotations along scientific parameters. Mark-up work and research on the social history of languages must take some other points into account, as we will see in the following sections.



## **10. DATA STRENGTH, RELIABILITY AND OTHER FEATURES OF QUOTATIONS**

We have included two separate sets of criteria in this short chapter: one concerns data strength and the other deals with other features of the quotations and of the classification of the information among our taxonomy proposal. These two sets are not strictly related to either the historical situation or to sociolinguistic classification. This is why they are being treated separately. However, they can both be used with all types of quotations. All these pieces of information are important concepts to consider when doing scientific work in the field of historical sociolinguistics. As J.M. Hernández-Campoy & N. Schilling (2012: 63) state, “Historical sociolinguistics has often been considered to suffer, perhaps inevitably, from lack of representativeness and validity of its findings. This is because the sociolinguistic study of historical language forms must rely on linguistic records from previous periods – most of which will be incomplete or non-representative in some way – as well as on knowledge and understanding of past sociocultural situations that can only be reconstructed rather than directly observed or experienced by researcher”.

### **10.1. DATA STRENGTH**

#### **10.1.0. General statements**

Guaranteeing data strength and reliability is a basic concern in all scientific research. Even using the best theoretical-methodological tools, researchers will have great difficulty reaching correct conclusions if they do not have access to reliable data. At the same time, the reliability of sources and data is a complex issue. There are several concepts connected with these issues in our field of study: reliability, applicability, representativeness, proximity to sources, proximity of testimonies to their authors/recorders and in time, data strength in itself, and so on. In addition to all of the above, quotations must be treated in different ways depending on their sources and historical periods (Hernández & Conde 2012: 123-210). In this section, we will try to address this complexity. We will give a summary of the concepts SHB considers to be of use. Sometimes it is not easy to distinguish between all of these factors. We will consider the following six cases:

- *Explicit data yes/no*: is data explicit in the text, or does it have to be inferred?
- *Broad / narrow field of application*: can the data be applied to a broad or a narrow field?
- *Information reliability/data strength*: is the data conditioned by the writer's interests?
- *Source reliability*: is the source we are using original and properly vouched for?
- *Proximity*: what distance is there between the data and ourselves?
- *Relevance at the monograph level*: has the data been used in specific monographs?

These six cases are very close to the seven problems listed by J.M. Hernández-Campoy & N. Schilling (2012: 63-79) in their article “The Application of the Quantitative Paradigm to Historical Sociolinguistics: Problems with the Generalizability Principle”: 1) representativeness, 2) empirical validity, 3) invariance, 4) authenticity, 5) authorship, 6) social and historical validity, and 7) standard ideology. It must be taken into account that the list made by J.M. Hernández-Campoy & N. Schilling is mainly oriented towards studies of variationist sociolinguistics while ours has a point of view closer to the sociology of language and social history, which may explain some of the differences between the two models.

#### 10.1.0.1. *Explicit data yes/no*

Texts themselves usually provide us with a lot of direct information. In those cases, what the text says verbatim is an interesting piece of information regarding historical sociolinguistics and, so, it is quoted as such. For instance, when an author claims (Ordóñez 1761) that “In San Sebastian, Basque is the general language of everyday life”. In other cases, however, there is no such textual and direct testimony but some information can be inferred from what is said. In those cases, *what documents say in general* (in some cases, *what they do not say*) can and sometimes needs to be taken into account to tease out some consequences. For instance, if there is specific information in a text that the inhabitants of a village do not know (and do not even understand) a language other than Basque (i.e. information about language competence), it can be inferred, without much doubt, that Basque is the usual, everyday language, even though there is no direct, word for word mention of language use in the text.

The term *inference* is available in all the cells of the sociolinguistic matrix for expressing conclusions that SHB has derived indirectly from data.

### 10.1.0.2. *Breadth of applicability*

Does the information which the quotation gives us describe a generalisable situation, or an unusual one-off linguistic event at a particular moment (and which, consequently, is irregular and atypical), providing information that is as remarkable as it is marginal? Some pieces of information may be completely true, and, so, highly reliable, but of little practical consequence as far as making inferences about the general sociolinguistic situation is concerned. This characteristic has often been called representativeness in the scientific literature (see, for instance, Schneider 2002: 81-83; Hernández-Campoy & Schilling 2012: 66). For instance, if a law about schooling says something about language use, we may be dealing with a document of great applicability. Above all from the middle of the 18th century onwards, one can assume that pupils have followed the lines laid down by that law in increasing proportion in each new generation. However, we are aware that what legal documents have said about language questions is one thing, and what has actually happened can be quite, even very, different. In such cases, we may be looking at a document that has a considerable breadth of application, but whose reliability must be checked in greater detail. On the contrary, if the document we are examining is private (a letter between a seller and a buyer, for instance, explaining when and how the purchase is to be paid for), the data in it may be considerably more reliable, but its applicability will be limited, unless other data can be taken into account. It is also true that it can be the testimony of a broader social situation. In general, it is easier to draw general conclusions from general cases than from isolated, individual cases. It is another matter, however, if several individual cases can be aggregated: for instance, if we had many letters on transactions such as the one we have mentioned. See the explanations on the different types of dominance configuration tables in chapter 4.

Finally, it must be mentioned that in some cases, the physical features of the source can provide substantial information on the historical importance of a document. As Verweij says “[T]he purely material aspects of a manuscript can supply us with important data on its history. It is by following up this material and historical analysis of manuscripts that the diffusion of a text, its function, its usage and the different paths it has taken throughout history can be worked out. In this way, we can approach the historical reality the text has lived through” (Verweij 2006: 377 in Esteban 2012: 141).

#### 10.1.0.3. *Is data conditioned to the writer's interests?*

As we have explained elsewhere in this methodological model, if the person giving the information has a particular interest in expressing what is expressed (an ideological, symbolic or pragmatic interest), then that very interest reduces the testimony's reliability. That loss of reliability cannot be marked directly with the terms or labels we use, but the writer's interest may be mentioned in notes on specific quotations. Writers turn out to have special interests more often than expected when sociolinguistic data is being provided. Many examples of this can be given: priests who did not know Basque (well) described particular villages as being non-Basque speaking or bilingual so they could get work in them (see, for instance, Madariaga 2014: 185-213, Jimeno Jurio 2004).

#### 10.1.0.4. *Is the source original?*

Often we do not obtain data of the same degree of reliability from an academic book or from an article in the press. We expect the former to prove what it states point by point, quoting sources literally. In the latter, on the other hand, it is often enough to give the reader a text without a precise reference. The possibility of checking the validity of affirmations made in the two sources is different. In the same way, getting information from an original source is different to obtaining it through an indirect one, for instance, when one author quotes another.

#### 10.1.0.5. *To what extent can data be checked?*

This option of our taxonomy is useful for reflecting what guarantee the data we are including has, for knowing if it has been checked directly by our project's members or not. See subsection 10.1.2 for further details.

#### 10.1.0.6. *Has the data been useful?*

This information is purely informative and internal to our project. We carry out different partial research projects about a number of specific moments in the history of Basque, but we put all the information in a general database, so this option allows us to know which of the monographs the quotation has been used in. It also allows us to update old monographs with quotes recently included in the database. Finally, it lets us know how relevant a quotation has been. See subsection 10.1.3 for further details.

### 10.1.0.7. *Option adopted by SHB*

The first of those six options has already been included in the terminology system under the *inference* label; the second (applicability in broad terms) has not been included; the third (the writer's interest) can be included in the notes attached to the quotation; the remaining three are dealt with in this chapter. Therefore, we will make three main distinctions among the second-level labels for *data strength*: *closeness to source*, *strength of evidence* and *relevance*.

#### 10.1.1. **Closeness to source**

Not all historical documentary materials are equally reliable. Data from some sources may be very reliable, and that from others of limited reliability. This has long been a problem for historians: Gerd Simon made a proposal for classifying documents, for instance: *Zur Beurteilung von Informationsarten* (Simon [no date]).

In each case, whether the information is first, second, third or fourth hand is specified, together with an indication of whether the source is shown. Simon specifies the contribution, the disadvantages and his recommendations for each type of data. When dealing with the possible advantages, he mentions the following:

- a) ***Proximity***. Whether the description or testimony is chronologically close to or far from the period (reality) under study in a given monograph.
- b) ***Checkability***. In other words, whether the details provided with the data allow us to access the original document.
- c) ***Conceptual inclusion***. Whether the piece of information can be included in a theoretical system or not.
- d) ***Comprehensibility***. Whether the piece of information can be easily understood, or whether it is difficult to draw correct conclusions from it without other further global, contextualised information.

Table 36: Evaluation of information types

Type of information	Description of information	Advantages	Disadvantages	Recommendations
Primary information	Contemporary archives and publications	Close to the events, reliable (derived from criticism of the sources)	Hard to obtain, lacking context; risk of misunderstanding or misinterpreting.	Completely necessary for doctoral theses
Secondary information	Provided by experts, <b>indicating</b> source of primary information	Checkable, reasonably protected by context from misunderstanding and falsification.	Information must at least be checked by random sampling; not always easy for the reader	Necessary in publications by university teachers, at least
Third-level information	Provided by experts; <b>without indicating</b> first-hand sources, generally based on second-level information	Can be included in information system or theory	Cannot be checked; not reliable	Appropriate for presenting a subject and for textbooks and handbooks
Fourth-level information	Mostly based on third-level information, provided by popularising scientists (seldom experts)	Easy to understand	Lack of systematization, tendency to summarize and simplify	Appropriate for non-experts

In general, we have included the scheme suggested by Simon in SHB's methodology and so have created terms for those four types of information in the labelling system.

In addition to those four, there is a further category that deserves particular mention: a text may be original, first-hand, but that does not guarantee that the information given by the document is true. In most cases, we have simply accepted it as true, there being no statements to the contrary, but in some cases, it has been possible to prove that the document is *apocryphal*. In the Middle Ages, for instance, there are several cases of texts produced by people in defence of their interests. Care must be taken in such cases: not infrequently what a document says may not be the (whole) truth. What it says may be wrong, in part or as a whole, in both content and date. This does not mean, however, that everything said there is false. Names of people and places given in this kind of document, for instance, may well be correct. The term *apocryphal* is used to warn that caution should be exercised. Further details may be given in the notes on the quotation. One such case, until the contrary is proved, is the Bull about the foundation of

the kingdom of Navarre (in other words, that of Pamplona / Iruñea), which offers fairly precise details of great interest about the ethnolinguistic configuration of Navarre, among other details. Hence, apocryphal does not necessarily mean that nothing in the text is of value: it may mean that at the time when the document was forged (or adapted) at least, it did have some verisimilitude.

In short, five terms have been created for this subset: *primary information*, *secondary information*, *third-level information*, *fourth-level information* and *apocryphal*.

In practice, it is quite difficult to use these four levels. It is easier to use the two habitual distinctions of sources and bibliography – see, for instance, Madariaga's books and other authors too, i.e. Ahačič (2014: 293) “primary source vs secondary source”. Furthermore, in some cases, depending on the objectives of the research, the bibliography (*secondary source*) becomes the source (*primary source*), particularly in the case of historiographical research. For instance, if the ideology of historians of a certain period is being examined, the bibliography itself becomes the source.

### 10.1.2. Strength of evidence

The strength of a piece of testimony changes as we distance ourselves from a source, in both time and space. SHB uses a four-level scale:

- A specific piece of information has been checked by SHB: we know that such a book was written in Basque: we have had a copy of it in our hands and checked it ourselves;
- Somebody else (B) claims to have checked the data and SHB has registered that claim;
- A third party (C) has on their own report quoted and checked the quotation, but that person is not the writer who is our source. The latter has not seen it, but trusts C's description of it;
- The person mentioning the information simply believes it: with more or less justification, the writer believes, say, a given book to exist in Basque, but has not in any way checked it, or received any confirmation of its existence.

So, about the strength of evidence, SHB has distinguished between these four options by using the following terms: *direct testimony*, *direct mention*, *indirect mention* and *individual opinion*.

### 10.1.3. Relevance to research

After collecting data, which will be of varying value, it is interesting to know if we have used it in a given monograph. We will only be able to gauge this at the conclusion of each research monograph. This information is useful for updating old monographs. We have used the *relevance* label when quotations have actually been made use of.

## 10.2. FEATURES OF QUOTATION

Finally, there is another small set of labels, valid for all quotations and so not included in the cells of the sociolinguistic matrix. This mark-up set has been called *features of quotation*. It has four second-level labels: *monograph*, *nature of quotation*, *language mentioned in quotation* and *language of quotation*.

### 10.2.1. Monograph

The name initially given to the monograph is recorded under this heading. Using this label, all the quotations connected with a particular monograph can be consulted.

### 10.2.2. Nature of quotation

As with documents, one may wish to record the nature of quotations, above all if it does not coincide with the rest of the document: for instance, a map or a table in a book constituted primarily of text. To reflect the nature of quotations, there is a total of eleven labels available: *statistics*, *questionnaire*, *audiovisual*, *image*, *map*, *sound*, *table*, *text*, *list*, *other* and, finally, *embedded quotation*.

### 10.2.3. Language mentioned in quotation

To record the language mentioned in a quotation, there are, basically, ten language labels on the third level relevant to the case of Basque: *Aquitanian* (for the Old Roman Empire times Aquitanian), *Arabic*, *Romance*, *Basque pidgin*, *Basque*, *French*, *Iberian*, *Latin*, *Spanish* and, for other cases, *other language*. Of those ten options, only two have been developed to the fourth level, providing the possibility of greater precision: *Romance and Basque*. In the first case, five options have been defined: *Castilian Romance of Basque Autonomous Community area*, *Navarre-Aragonese*, *Gascon*, *other Occitan* and *other*; in the second case, however, there are only four choices: *General, undetermined*; *Standard Basque*; *Basque popular language* and *written variety of Basque*. We believe that this list

reflects the languages most used in the Basque region historically: if there have ever been others, we believe that their social influence has been minimal and, until otherwise proven, have decided to include them under the heading *other language*.

#### 10.2.4. Language of quotation

There are six options to mark the language of the quotation: *Basque*, *Spanish*, *Latin*, *French*, *English* and, for all other cases, *other*. We believe that the first five languages cover the majority of texts about Basque.



## 11. SHB'S SOURCES

In historical sociolinguistics and social history, sources and the information they contain may be reliable to varying extents, as has been seen in chapter 10. This, however, is not the only difficulty we are confronted with. In this chapter, we will address a concern we have already looked at, if only briefly, when we presented the international historical sociolinguistics (and other related lines of research) in Zalbide, Joly and Gardner 2015. The different researchers in historical sociolinguistics underline the lack or scarcity of sources time and again. In the case of Basque and other invisible languages which have lived in diglossic situations, the scarcity of sources is even greater. Talking about the Middle Ages, for instance, Reguero (2012: 66) mentions this issue: “Unfortunately, there are few texts or testimonies for examining Basque in the Middle Ages, and this is a problem when it comes to studying the Basque of that period”. As well as being scarce, there are several other problems with the sources we have available. Reguero (2012: 66-67) continues: “To this problem must be added that of testimonies about Basque appearing in texts written in a language other than Basque and using that language’s spelling system. In the same way, we do not know whether the author of the document knew Basque and, so, whether there could be misunderstandings, mishearings, etc. between what was said and what they heard and wrote. Furthermore, there may be several interpretations of each testimony because what is written is not clearly decipherable. For instance, while Mitxelena (*TAV*, §2.1.2), read IAUNINCO on a gravestone in Garai, it could also be read as NUNINCO (Azkarate & Garcia Camino 1996: 143). Furthermore, even in cases in which the text is easy to read, linguists may assign different interpretations to the reading”. In this chapter, we will discuss potential sources for SHB and their possible exploitation.

### 11.1. SOURCES FOR HISTORICAL SOCIOLINGUISTICS

With regard to sources of information on historical sociolinguistics, three main sets may be distinguished.

#### A) Direct testimony about oral language (transcriptions of oral Basque):

1. Historical transcriptions of oral language: sermons, minutes of administrative meetings, famous people’s speeches, testimony given in court, etc. For more recent times, there are also radio recordings, tel-

evision programmes, recordings of ethnological interviews, etc. (see Martineau 2012).

2. Fictional oral texts: direct speech in plays and novels, fictional conversations in didactic tools for foreign language teaching, etc.

B) Direct testimony of written language (Basque texts):

1. Published texts: novels, plays, works about history, grammar books, etc.

2. Official texts: Basque texts (or fragments) in court registers, notaries' documents, official proclamations, etc.

3. Unpublished texts: personal letters, unpublished literary works, handwritten notes in books, etc.

C) Indirect testimony about sociolinguistic situations (presented in any language):

1. Metalinguistic notes in published texts (for instance, the notes in *Peru Abarka* (Mogel 1990 [1881])), direct testimony about sociolinguistic situations (for instance, what Camino (1963 [1780]) says about the language situation in Donostia-San Sebastian at the end of the 18th century), foreign travellers' notes about the sociolinguistic situation in different places, etc.

2. Published or unpublished official reports: notes and reports from official school inspections, questionnaires, etc.

3. Published or unpublished indirect testimony: from official documents, or from the documents and certificates issued by notaries (for instance, technical words in Basque included in a will or on a list, etc.), court cases connected with language and sociolinguistic situations (Rilova 2006, 2009), etc.

For reasons inherent to the Basque case, SHB has decided to choose 1980 as the cut-off date for its research. That time limit permits the inclusion of some radio and television archives, videos, recordings about oral language, etc. In the Basque case, for instance, during the First World War (1914-1918) the Germans recorded some prisoners' songs, including some in Basque (Canas & Menoyo 2016).

The classification which we have put forward here has been specifically prepared for SHB, primarily from a sociology of language perspective. Variationist

sociolinguists have put forward an alternative classification to examine oral language. Schneider distinguishes five types of text:

1. “Recorded” (direct transcription of an interview, for instance);
2. “Recalled” (transcription in an autobiography of a conversation which took place in the past, for instance);
3. “Imagined” (appearing in the letters of semi-literate people, for instance);
4. “Observed” (including a traveller’s observations about the language situation in a particular place, for instance);
5. “Invented” (conversations in literary works, for instance).

Each type has its own features: whether a person taking part in a conversation transcribed their own words (or not), whether recording took place after the event (or in real time), etc. (See Schneider 2002: 71-81).

**Table 37: Text type and orality** (“Categorization of text types according to their proximity to speech” in Schneider 2002: 73)

Category	Reality of speech event	Speaker – writer identity	Temporal distance speech – record	Characteristic text types
Recorded	real, unique	different	immediate	interview, transcripts, trial records
Recalled	real, unique	different	later	ex-slaves narratives
Imagined	hypothetic, unique	identical	immediate	letters, diaries
Observed	usu. real, unique	different	later	commentaries
Invented	hypothetic, unspecified	n/a	unspecified	literary dialect

In addition to direct testimony, recording what authors (and particularly historians) have had to say about particular historical situations is also essential. In other words, second level bibliography, too, must be taken into account as well as examining first-hand sources. In this area, Intxausti (2011) is of great assistance in terms of locating first and second level sources for those interested in the social

history of Basque (for further information about Intxausti's work, see Zalbide, Joly, Gardner 2015: 488-491 and Joly 2011b).

## 11.2. DEALING WITH ARCHIVE MATERIALS

Many of the sources used by SHB come from archives. The following types of documents are of particular value:

- a) Notarial protocols: wills, sales documents, etc.
- b) Laws: Provincial laws, City charters, royal decrees, etc.
- c) Court cases: civil, ecclesiastical.
- d) Local or municipal council documents (minutes, etc.)
- e) Provincial institutions: provincial councils and their executive arms.
- f) Ecclesiastical archives: in the case of Basque Pamplona, Calahorra, Bayonne (and a further 15 dioceses).
- g) Cultural institutions: in SHB, Eusko Ikaskuntza, Euskaltzaindia, other entities, etc.
- h) Private archives: letters, wills, etc.
- i) Archives of royal courts (Pamplona, Pau, Valladolid in SHB's case).
- j) Specific searches in large archives (Valladolid, Rome, Seville).

The list, however, is not exhaustive. As Madariaga (2014: 27) has mentioned, valid information may be found in any type of archive: "Language being, as I say, a transversal element, the documents referenced may turn up in almost any type of archive: ecclesiastic or secular, local or general, in the Basque Country or also outside it". Documents may also be of many different types. Madariaga (2014: 27) mentions the following: "(...) from lawsuits about insults to works of language apologists, via problems concerning religious preaching, jurisdictional conflicts, military proclamations, satirical songs, witch trials, festive occasions, matrimonial infidelity, rogations and many, many more".

Unfortunately, much material of that type related to Basque is still in the archives: in storage and undiscovered. Most of the material will consist of documents yet to be unearthed, or documents which despite being known to us have yet to be read and exploited from a sociolinguistic point of view. In some cases, texts which are of interest to SHB (texts in Basque or texts with sociolinguistic

data) are found in archives by historians; however, as Basque and its sociolinguistic situation is not the subject of their research, those discoveries are not made known to the scientific community of the sociolinguistic field and they get lost. As we have mentioned at the start of this chapter, two types of information can be found in archives: original texts (or fragments of texts) in Basque and documentary testimony about the sociolinguistic situation of the Basque Country. The latter are almost always in a language other than Basque.

### 11.2.1. Collecting Basque texts in archives

There are few direct sources available for drawing up the social history of Basque, and most information is indirect. By “direct information” we are referring to texts in Basque or direct contemporary testimony about sociolinguistic situations. In order to carry out sociolinguistic research on a particular period, then, both the scarce material available and inferences drawn from indirect information must be used. As has often been mentioned (see chapter I in Zalbide, Joly, Gardner 2015 and Madariaga 2014: 27), language is a transversal feature of society: it is to be found everywhere and making inferences based on such indirect information often enables us to formulate meaningful hypotheses about daily language use.

Whether examining private or public archives, the objective must be to carry out the most exhaustive search possible. Bearing in mind the current situation of those Basque materials, for one thing, and the amount of work involved in an exhaustive approach, for another, that will inevitably be a long-term objective. The most sensible thing is to gather information little by little, researching specific times and places. That is how SHB has carried out its work until the present and it will continue to do so in the foreseeable future. Indeed, SHB’s database has been set up to gather the information arising from those monographs of limited scope and classify it appropriately.

In general, two types of tasks have to be carried out when collecting Basque texts for SHB: all texts published in Basque have to be gathered (many such sources are already available); work is just beginning on collecting unpublished texts in Basque. The second type of data gathering is much more difficult: at present, it is impossible to examine all archive documents. This means that the first approach is often through catalogues of archive collections. Unfortunately, the information in catalogues is often limited and, in most cases, there is no record of whether there are documents in Basque or not, let alone whether there is a single Basque sentence or word embedded in a text in a language other than Basque.

### 11.2.2. Collecting indirect testimony

Collecting indirect testimony is even more difficult than collecting direct testimony or texts in Basque. Above all, reading archival texts must be done from a sociolinguistic perspective. Many different types of information must be collected; for instance, scribes used to report the language used in a trial like this: “y declaró en lengua vascongada/ vulgar/ del país (...)” (“so-and-so made their declaration in Basque / the vernacular / the local language (...”). Likewise, sentences such as this can be found at the end of notary documents: “y se le dió a entender en vascuence (...)” (“and this information was explained to them in Basque (...”). These two examples give us direct information about the use of and language competence in Basque. But, of course, there is even more remote testimony. Let us imagine, for instance, a list in a will registered by a notary: there may be some technical words in Basque inserted into the non-Basque text, or there may be interferences caused by Basque ways of speaking in non-Basque texts. There are two possible causes in the first case: the scribe did not know the technical term in the language other than Basque, only knowing it in Basque and, consequently, wrote it in Basque; or, not understanding the Basque term, they transcribed it as heard, without knowing what it meant. In either case, two contrasting conclusions may be drawn: the scribe may have been a bilingual Basque speaker or, to the contrary, a monolingual non-Basque speaker. In practice, both cases may arise but the first one is the most usual, in fact, scribes often introduce a Basque word as follows: “XXX that is called/ they call [*Basque word*]” (for examples see Prieto & Irixa 2016: 67), which means that the language used in daily life was Basque and not the language the scribe was writing. It must be taken into account that in the 16th century an important metallurgical industry was developed in the Basque Country, but was non-existent in Castile. The specific vocabulary related to metallurgy was therefore available in Basque, but not in Castilian as is often reflected in original documents (Azkune 2015: 218). Moreover, this phenomenon is quite common and not only linked to the vocabulary of metallurgy: Irixa and Prieto (2017) have drawn up a list of such terms in the documentation of Gipuzkoa for the 16th-18th centuries.

### 11.2.3. A practical example: archive information about Zestoa

We have mentioned two types of information: direct testimony in Basque (Basque texts) as well as information about the sociolinguistic situation in the Basque Country. As there has been a centuries-long diglossic situation in the Basque Country, the language used orally in daily life did not appear in writing. Collecting quotes reflecting this indirectly is of particular interest.

Iñaki Azkune is carrying out a thorough search for information in various archives about Zestoa village in the most exhaustive possible way. He has collected and is still collecting material that is of interest to SHB. In addition to direct testimony, he has also included mistakes, interferences and so on in written non-Basque texts influenced by oral Basque. In the next few lines, we will sample the type of information that may be found when examining archive documents by looking at a few real examples.

*a) Information about literacy:*

In the documents Azkune has examined, the reader is occasionally informed that someone “does not know how to sign”. This is interesting information about literacy. If the social class, gender, etc. of the person in question have also been recorded, then it is possible to make inferences about the sociolinguistic configuration of society. In general, at least in the documents we have accessed, fewer women than men seem to have known how to sign their names. Likewise, there seems to be a clear difference by occupation: the closer to the world of the farm and the further from that of the town, the larger the proportion of people unable to sign their name. We have used a limited sample to draw these conclusions; the hypothesis will have to be confirmed using a larger sample. The figures evolve by place and historical period. Examining those changes may be very interesting when examining the nature and rhythm of the spread of literacy.

There are also direct notes about literacy. To give some examples:

“e por/23 mi el dicho escribano leyda, luego “ [XV. m. 91] (p. 13) [‘read afterwards by me the aforementioned scribe’] and “presento e leer fiso a mi el dicho escribano la dicha carta de merçed/8 por mi el dicho escribano leyda, luego el dicho/11” [XV. m. 92] (p. 15) [‘[s/he] presented and had me the aforementioned scribe read the aforementioned letter of grant’].

See, likewise, information about Basque monolingualism:

“(…) se le leyó en lengua vulgar”, “(…) se le dio a entender en lengua vulgar” [‘it was read to them in the vernacular language’ / ‘it was communicated to them in the vernacular language’] are frequent. That means that while the scribes were bilingual and all the official papers were drawn up and written in Spanish, ordinary village folk were monolingual Basque speakers. The linguistic mediators (scribes, priests, clerks etc.) and how they interfered between monolinguals and the official language of power are key topics in diglossic situations, when the oral language was not the language of power and a part of the population was monolingual (Madariaga 2014: 305-392).

*b) Mutual influence between Basque and Spanish:*

Sources of information about how Basque and Spanish have influenced each other is also of great value. This information must be examined with great care: as with Basque, there is a great difference between the Spanish of the time and today's Spanish, and what at first may seem to be Basque influence may, in fact, in some cases be no more than a feature of Spanish of the time.

In documents from Zestoa from the 14th and 15th centuries, Basque influence often appears in texts written in Spanish. Here are a few simple examples:

- Gender error in Spanish articles (“e leer fizo **vn** procuración”), or “sus hermanos y hermanas”, for instance, where you would expect only the Spanish masculine form, generally taken – then, at least – to include the feminine as well, which was not and is not the case in Basque).
- Basque terminology (use of terms like “austarriça” or “astigarra”, for instance).
- Word forms influenced by Basque phonetics (“Arreselin” rather than “Reselin”, for instance).
- Use of Basque syntax.

*c) Other interesting information can be gathered from archives:*

- Information from place-names.
- Quotes stating that information was given in Basque.
- Others. The cases which we have looked at so far are from research on Zestoa, but many more may be found in other places too. For instance, some court cases may be directly connected to language: when priests had to translate, they sometimes refused to because they were paid very little for such work. Such refusals led to conflict between the authorities and some priests (Madariaga 2014: 306-314). The case of one long-lasting trial in Navarre is well known, as is the series of debates that occurred in Navarre on priests' low level of Basque (Madariaga 2014: 185-213, Jimeno Jurio 2004). Concerning the types of information and sources, there are considerable differences by historical period. Madariaga (2014) provides us with considerable information and many examples for the 17th and 18th centuries. However, information available about previous periods is very different and must be treated differently. The language's internal configuration, the structural

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characteristics yielded up by proper names (local place names and, very often, the surnames derived from them) are often, even today, the main starting point for those earlier periods. It should also be borne in mind that the huge new linguistic databases can offer new perspectives for research (for instance Conde 2007, Säily *et al.* 2017, Fitzmaurice *et al.* 2017, Baker *et al.* 2017).



## CONCLUSION

In this book we have tried to present and offer a methodological proposal for the historical sociology of language which can also be used in synchronic research; this work has led us to the creation of a global taxonomy useful for the sociology of language research.

We first presented the socio-historical location parameters which allow us to locate a speech event, situation or information in the social coordinates: social reality, social time, geographical and social position, geo-linguistic position and so on.

In the second chapter, the global structure of sociolinguistic classification has been outlined. Five dimensions coded from A to E have been presented: *language use* (= Dimension A); *language competence* (= Dimension B); *language structure* (= Dimension C); *societal features* (= Dimension D); people's *opinions-attitudes-behaviours* towards languages, speakers and the use of one language or another (= Dimension E).

Each dimension has been examined according to six different analytical parameters which have also been presented: the *descriptive, kinetic, dynamic, prospective, contrastive* and *prescriptive* parameters.

These five dimensions and six analytical parameters all together form a matrix or explanatory scheme which can be a helpful framework for the sociology of language research. Most of the concepts discovered in sociolinguistics and the sociology of language over the last 50 years have been or can be included in our taxonomy proposal.

Finally, at the end of the book, many interesting remarks about data strength, reliability and sources for historical sociolinguistics have been highlighted.

Basque research being the topic of inquiry of the Basque Academy, our proposal has a Basque background, but we are fully convinced that this framework can be easily adapted for any geographical or geo-linguistic area. This work would be even easier for diglossic situations. We hope that this methodological proposal and this taxonomy will be useful for other researchers, and we are open to helping in the adaptation of this taxonomy to other sociolinguistic backgrounds.



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# APPENDIX

## TAXONOMY PROPOSAL FOR THE SOCIOLOGY OF LANGUAGE RESEARCH

TABLE OF CONTENTS			
EHS	SOCIO-HISTORICAL SETTING	246. page	
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		3. analytical parameter	253. page
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	FEATURES OF QUOTATION	Monograph, Nature of quotation, Language mentioned in quotation, Language of quotation	257. page
DATA-STRENGTH		257. page	

**SOCIO-HISTORICAL SETTING**

Socio-historical setting	When	Period discussed: date of beginning	<i>Value</i>			
		Period discussed: date of ending	<i>Value</i>			
	Type and quantity of speakers	Social attributes	Age			
			Gender			
			Social stratification			
			Other			
		Proportion and number of speakers	Absolute number			
			Basque/non-Basque proportion			
	Basque demographic concentration					
	Geo-graphical position	Geolinguistic position	Basque-speaking area			
			Non-Basque-speaking area			
			Other			
		Administrative demarcation	Civil demarcation	<i>Value</i>		
			Religious demarcation			
			Other	Judicial demarcation		
				Other demarcation		
				Unlocated statement		
			Ecological demarcation	Sedentary life-style	Without migratory movement	
	With migratory movement	Emigration/diaspora			Basque retention without learning/using the host language	
		Basque retention plus learning/using the host language				
		Full ethnolinguistic assimilation, full debasquisition				
Immigration		Language retention without learning/using Basque				
		Language retention plus Basque learning/ using				
	Full ethnolinguistic assimilation, full Basquisition					
Mobile life-style	Transhumance-transmeritance					
	Long-distance trading					
	Sea and land transport					
	Higher studies place					
	Temporarily working away					
	Other					
Diaspora						
Urban/rural dichotomy	Urban					
	Rural					
Ager/Saltus dichotomy	Ager					
	Saltus					
Other						
Socio-functional position	Domain	Authorities and administration				
		Leisure and sport				
		Religion				
		Home and family				
		Neighbourhood: friends and acquaintances				
		Mass media				
		Education				
		Work sphere				
		Trading				
		Other				
	Role relationships					
Language status: H/L						

### LANGUAGE BEHAVIOUR

Language behaviour	MEDIA	OVERTNESS	STYLE		
	General, undetermined	<b>Table B</b>			
	Listening	General, undetermined	<b>Table B</b>		
			From known sender	General, undetermined	<b>Table B</b>
				Formal	<b>Table B</b>
				Informal	<b>Table B</b>
				Intimate	<b>Table B</b>
		From unknown sender	General, undetermined	<b>Table B</b>	
				Formal	<b>Table B</b>
				Informal	<b>Table B</b>
				Intimate	<b>Table B</b>
	Speaking	General, undetermined	<b>Table B</b>		
		Inner speech	General, undetermined	<b>Table B</b>	
				Informal	<b>Table B</b>
				Intimate	<b>Table B</b>
		For known receiver	General, undetermined	<b>Table B</b>	
				Formal	<b>Table B</b>
				Informal	<b>Table B</b>
				Intimate	<b>Table B</b>
		For unknown receiver	General, undetermined	<b>Table B</b>	
				Formal	<b>Table B</b>
				Informal	<b>Table B</b>
				Intimate	<b>Table B</b>
	Reading	General, undetermined	<b>Table B</b>		
		For oneself	General, undetermined	<b>Table B</b>	
				Formal	<b>Table B</b>
				Informal	<b>Table B</b>
				Intimate	<b>Table B</b>
Aloud		General, undetermined	<b>Table B</b>		
			Formal	<b>Table B</b>	
		Informal	<b>Table B</b>		
		Intimate	<b>Table B</b>		
Writing	General, undetermined	<b>Table B</b>			
	For oneself	General, undetermined	<b>Table B</b>		
			Formal	<b>Table B</b>	
			Informal	<b>Table B</b>	
			Intimate	<b>Table B</b>	
	For known receiver	General, undetermined	<b>Table B</b>		
			Formal	<b>Table B</b>	
			Informal	<b>Table B</b>	
			Intimate	<b>Table B</b>	
	For unknown receiver	General, undetermined	<b>Table B</b>		
			Formal	<b>Table B</b>	
			Informal	<b>Table B</b>	
		Intimate	<b>Table B</b>		
Translation					
Cryptolanguage					



Table B: DOMINANT LANGUAGE	
General, undetermined	<b>Table C</b>
Always or almost always in Basque	<b>Table C</b>
More frequently in Basque	<b>Table C</b>
Equally in both	<b>Table C</b>
More frequently in language other than Basque	<b>Table C</b>
Always or almost always in language other than Basque	<b>Table C</b>



Table C: LANGUAGE VARIETY
Basque in general
Det-Basque
Dot-Basque
Dut-Basque
Standard Basque
Language other than Basque in general
Spanish
French
Latin
Gascon
Navarre-Aragonese
Other non-Basque language

**DESCRIPTIVE PARAMETER: 1A, 1C, 1D, 1E**

Analytical parameter	Descriptive parameter	1A - Describing language use	General, undetermined				
			Describing language use without language contact				
			Describing language use with some kind of language contact	General, undetermined			
				Situation stable (language maintenance prevails)	Without (patent or operative) conflict		
					With (patent or operative) conflict		
				Situation unstable (some sort of language shift appears)	With (patent or operative) conflict		
					Without (patent or operative) conflict		
			Diglossia	Present			
				Absent			
			Word <i>Diglossia</i> mentioned				
		Language use related dominance configuration table					
		Reason for 1A					
		Inference					
		1C - Describing language structure	Data derived from language structure	Global description	Basic linguistic features	Phonetics	
						Morphosyntax	
						Lexicon	
						Semantics	
					Interlinguistic distance		
				Result of language contact	Interference and loanwords	Phonetics	
						Morphosyntax	
				Lexicon			
				Semantics			
	Code-switching						
Internal uniformity of language	Degree of fragmentation	Geographic fragmentation					
		Social fragmentation					
	Degree of standardisation						
	Type of standardisation						
Power and solidarity indices							
Significant source	Onomastics	Place names					
		Anthroponyms					
		Ethnonyms					
		Glottonyms					
		Names of things					
	Paremiology						
	Etymology						
Other							
Reason for 1C							
Inference							
1D - Describing societal features	Data relating to societal features	General, undetermined					
		Demographic features					
		Econotechnical features					
		Political-operative features					
		Psychosocial and sociocultural features					
Reason for 1D							
Inference							
1E - Describing language attitudes	Attitude about what?	Language use: A	Basque				
			Language other than Basque				
		Speakers and their language competence: B	Basque speakers				
			Speakers of language other than Basque				
		Languages: C	Basque				
			Language other than Basque				
		Ethnicity: D	Basque ethnicity				
			Non basque ethnicity				
		Language attitudes: E	Basque				
			Language other than Basque				
Other							
Reason for 1E							
Inference							

### DESCRIPTIVE PARAMETER: 1B (1)

Analytical parameter	Descriptive parameter	1B - Describing language competence	Speaker's linguistic repertoire								
			Level of language competence	General, undetermined	Table E	<table border="1"> <tr><th>Table E</th></tr> <tr><td>Listening</td></tr> <tr><td>Speaking</td></tr> <tr><td>Reading</td></tr> <tr><td>Writing</td></tr> </table>	Table E	Listening	Speaking	Reading	Writing
				Table E							
				Listening							
				Speaking							
				Reading							
				Writing							
				Unspecified Basque speaker	Table E						
				Unspecified non-Basque speaker	Table E						
				Unspecified bilingual speaker	Table E						
				Monolingual Basque speaker	Table E						
Bilingual Basque speaker	Table E										
Balanced bilingual speaker	Table E										
Non-Basque dominant bilingual speaker	Table E										
Monolingual non-Basque speaker	Table E										
Multilingual Basque speaker	Table E										
Multilingual non-Basque speaker	Table E										
Language competence related dominance configuration table											
Language competence acquisition mode	Acquisition via ordinary daily use	General, undetermined	Basque	Language competence in general	<table border="1"> <tr><td>Listening competence</td></tr> <tr><td>Speaking competence</td></tr> <tr><td>Reading competence</td></tr> <tr><td>Writing competence</td></tr> </table>	Listening competence	Speaking competence	Reading competence	Writing competence		
			Listening competence								
		Speaking competence									
		Reading competence									
		Writing competence									
		Language other than Basque	The five options above								
		Speaker of indeterminate L1	Basque	Language competence in general	<table border="1"> <tr><td>Listening competence</td></tr> <tr><td>Speaking competence</td></tr> <tr><td>Reading competence</td></tr> <tr><td>Writing competence</td></tr> </table>	Listening competence	Speaking competence	Reading competence	Writing competence		
				Listening competence							
			Speaking competence								
			Reading competence								
		Writing competence									
		Language other than Basque	<table border="1"> <tr><td>Language competence in general</td></tr> <tr><td>Listening competence</td></tr> <tr><td>Speaking competence</td></tr> <tr><td>Reading competence</td></tr> <tr><td>Writing competence</td></tr> </table>	Language competence in general	Listening competence	Speaking competence	Reading competence	Writing competence			
		Language competence in general									
		Listening competence									
		Speaking competence									
		Reading competence									
Writing competence											
L1 speaker of Basque	Basque	Language competence in general	<table border="1"> <tr><td>Listening competence</td></tr> <tr><td>Speaking competence</td></tr> <tr><td>Reading competence</td></tr> <tr><td>Writing competence</td></tr> </table>	Listening competence	Speaking competence	Reading competence	Writing competence				
		Listening competence									
	Speaking competence										
	Reading competence										
Writing competence											
Language other than Basque	<table border="1"> <tr><td>Language competence in general as L2</td></tr> <tr><td>Listening competence as L2</td></tr> <tr><td>Speaking competence as L2</td></tr> <tr><td>Reading competence as L2</td></tr> <tr><td>Writing competence as L2</td></tr> </table>	Language competence in general as L2	Listening competence as L2	Speaking competence as L2	Reading competence as L2	Writing competence as L2					
Language competence in general as L2											
Listening competence as L2											
Speaking competence as L2											
Reading competence as L2											
Writing competence as L2											
L1 speaker of language other than Basque	Basque	Language competence in general as L2	<table border="1"> <tr><td>Listening competence as L2</td></tr> <tr><td>Speaking competence as L2</td></tr> <tr><td>Reading competence as L2</td></tr> <tr><td>Writing competence as L2</td></tr> </table>	Listening competence as L2	Speaking competence as L2	Reading competence as L2	Writing competence as L2				
		Listening competence as L2									
	Speaking competence as L2										
	Reading competence as L2										
Writing competence as L2											
Language other than Basque	<table border="1"> <tr><td>Language competence in general</td></tr> <tr><td>Listening competence</td></tr> <tr><td>Speaking competence</td></tr> <tr><td>Reading competence</td></tr> <tr><td>Writing competence</td></tr> </table>	Language competence in general	Listening competence	Speaking competence	Reading competence	Writing competence					
Language competence in general											
Listening competence											
Speaking competence											
Reading competence											
Writing competence											
L1 speaker of Basque and a language other than Basque	Basque	Language competence in general	<table border="1"> <tr><td>Listening competence</td></tr> <tr><td>Speaking competence</td></tr> <tr><td>Reading competence</td></tr> <tr><td>Writing competence</td></tr> </table>	Listening competence	Speaking competence	Reading competence	Writing competence				
		Listening competence									
	Speaking competence										
	Reading competence										
Writing competence											
Language other than Basque	<table border="1"> <tr><td>Language competence in general</td></tr> <tr><td>Listening competence</td></tr> <tr><td>Speaking competence</td></tr> <tr><td>Reading competence</td></tr> <tr><td>Writing competence</td></tr> </table>	Language competence in general	Listening competence	Speaking competence	Reading competence	Writing competence					
Language competence in general											
Listening competence											
Speaking competence											
Reading competence											
Writing competence											

**DESCRIPTIVE PARAMETER: 1B (2)**

Analytical parameter	Descriptive parameter	IB - Describing language competence	Language competence acquisition mode	Learning via education	Speaker of indeterminate L1	Basque	Language competence in general	
							Listening competence	
							Speaking competence	
							Reading competence	
							Writing competence	
						Language other than Basque	<b>The five options above</b>	
						L1 speaker of Basque	Basque	Language competence in general
								Listening competence in formal register
								Speaking competence in formal register
								Reading competence
Writing competence								
Language other than Basque	Language competence in general as L2							
	Listening competence as L2							
	Speaking competence as L2							
	Reading competence as L2							
	Writing competence as L2							
L1 speaker of language other than Basque	Basque	Language competence in general as L2						
		Listening competence as L2						
		Speaking competence as L2						
		Reading competence as L2						
		Writing competence as L2						
	Language other than Basque	Language competence in general						
		Listening competence in formal register						
		Speaking competence in formal register						
		Reading competence						
		Writing competence						
L1 speaker of Basque and a language other than Basque	Basque	Language competence in general						
		Listening competence in formal register						
		Speaking competence in formal register						
		Reading competence						
		Writing competence						
	Language other than Basque	<b>The five options above</b>						
Language competence loss mode	Speaker of indeterminate L1	Basque	<b>Table F</b>					
		Language other than Basque	<b>Table F</b>					
	L1 speaker of Basque	Basque	<b>Table F</b>					
		Language other than Basque	<b>Table F</b>					
	L1 speaker of language other than Basque	Basque	<b>Table F</b>					
		Language other than Basque	<b>Table F</b>					
L1 speaker of Basque and language other than Basque	Basque	<b>Table F</b>						
	Language other than Basque	<b>Table F</b>						
Reason for IB								
Inference								
			<b>Table F</b>					
			Language competence in general					
			Listening competence					
			Speaking competence					
			Reading competence					
			Writing competence					

**KINETIC PARAMETER: 2A, 2B**

Analytical parameter	Kinetic parameter	2A - Change in language use			
		Type of comparison	<b>Table G</b>		
		Evolution of language use	General, undetermined		
			Death of language other than Basque	<b>Table H</b>	
			Increase in the use of Basque	General, undetermined	<b>Table H</b>
				Spread of Basque	<b>Table H</b>
				Shift to Basque	<b>Table H</b>
				Disappearance of the use of language other than Basque	<b>Table H</b>
			Maintenance of the (non) use of Basque	<b>Table H</b>	
			Decline in the use of Basque	General, undetermined	<b>Table H</b>
				Spread of language other than Basque	<b>Table H</b>
				Shift from Basque to language other than Basque	<b>Table H</b>
		Disappearance of the use of Basque		<b>Table H</b>	
		Death of Basque	<b>Table H</b>		
		Evolution of language use among languages other than Basque	<b>Table H</b>		
		Diglossia	Present		
			Absent		
		Evolution of language use related dominance configuration table			
		Inference			
		Type of comparison		<b>Table G</b>	
		Evolution in speaker's linguistic repertoire			
		Evolution of language competence	General, undetermined	General, undetermined	
				Basque	
				Language other than Basque	
			Improving language competence	General, undetermined	
Basque					
Language other than Basque					
Maintaining language competence	General, undetermined				
	Basque				
	Language other than Basque				
Decrease in language competence	General, undetermined				
	Basque				
	Language other than Basque				
Complete loss of language competence	General, undetermined				
	Basque				
	Language other than Basque				
Evolution of route to acquiring language competence	Language acquisition via ordinary daily use	Basque			
		Language other than Basque			
	Learning via education	Basque			
		Language other than Basque			
Evolution of route to loss of language competence		Basque			
		Language other than Basque			
Evolution of language competence related dominance configuration table					
Inference					

  

<b>Table H</b>
General, undetermined
Functions
Speakers
Place

  

<b>Table G</b>
From moment A to moment B
Between generations
Older people speaking of their childhood
Between places
Other

**KINETIC PARAMETER: 2C, 2D, 2E**

Analytical parameter Kinetic parameter	2C - Change in language structure	Type of comparison	From moment A to moment B			
			Between generations			
			Older people speaking of their childhood			
			Between places			
			Other			
		Data derived from evolution (occurring) in language structure	Global structure evolution	Basic linguistic features	Phonetics	
					Morphosyntax	
			Lexicon			
			Semantics			
			Interlinguistic distance			
	Evolution in the result of language contact		Interference and loanwords	Phonetics		
				Morphosyntax		
	Lexicon					
	Semantics					
	Code-switching					
	Evolution in internal uniformity of language	Degree of fragmentation		Geographic fragmentation		
		Degree of standardisation				
		Type of standardisation				
	Evolution in power and solidarity indices					
	Evolution in significant source (onomastics, paremiology and etymology)	Onomastics	<b>Table D</b>			
Paremiology						
Etymological explanations						
Other						
Inference						
2D - Change in societal features	Evolution in societal features	General, undetermined				
		Demographic process				
		Econotechnical process				
		Political-operative process				
		Psychosocial and sociocultural process				
Inference						
2E - Change in language attitudes	Type of comparison	From moment A to moment B				
		Between generations				
		Older people speaking of their childhood				
		Between places				
		Other				
	Evolution of attitude about what?	Language use: A	Basque			
		Language other than Basque				
		Speakers and their language competence: B	Basque speakers			
			Speakers of language other than Basque			
		Languages: C	Basque			
			Language other than Basque			
		Ethnicity: D	Basque ethnicity			
	Non basque ethnicity					
Language attitudes: E	Basque					
	Language other than Basque					
Other						
Inference						
<b>Table D</b>						
Place names						
Anthroponyms						
Ethnonyms						
Glottonyms						
Names of things						

**DYNAMIC PARAMETER AND PROSPECTIVE PARAMETER: 4A, 4B**

Analytical parameter	Dynamic parameter	3A - Dynamics of change in language use	Relationship between dimensions	A	→	<table border="1" style="width: 100%; text-align: center;"> <tr><td><b>Table 1</b></td></tr> <tr><td>General, undetermined</td></tr> <tr><td>Demographic process</td></tr> <tr><td>Econotechnical process</td></tr> <tr><td>Political-operative process</td></tr> <tr><td>Psychosocial and sociocultural process</td></tr> </table>	<b>Table 1</b>	General, undetermined	Demographic process	Econotechnical process	Political-operative process	Psychosocial and sociocultural process
			<b>Table 1</b>									
			General, undetermined									
		Demographic process										
		Econotechnical process										
		Political-operative process										
		Psychosocial and sociocultural process										
		Detailed source of change – D	Table 1									
		Inference										
		3B - Dynamics of change in language competence	Relationship between dimensions	B								
	Detailed source of change – D		Table 1									
	Inference											
	3C - Dynamics of change in language structure	Relationship between dimensions	C									
		Detailed source of change – D	Table 1									
		Inference										
	3D – Dynamics of change in societal features											
	3E - Dynamics of change in language attitudes	Relationship between dimensions	B									
		Detailed source of change – D	Table 1									
		Inference										
	Prospective parameter	4A - Expected future language use	General, undetermined									
Without language contact												
With some kind of language contact												
Diglosia			Present									
			Absent									
Prospective language use related dominance configuration table												
Inference												
4B - Expected future language competence		Prediction about speaker's linguistic repertoire										
		Prediction about language competence	General, undetermined									
			Unspecified Basque speaker									
	Unspecified non-Basque speaker											
	Unspecified bilingual speaker											
	Monolingual Basque											
	Basque bilingual											
	Balanced bilingual											
	Non-Basque dominant bilingual											
	Monolingual non-Basque speaker											
Multilingual Basque speaker												
Multilingual non-Basque speaker												
Prediction about acquiring language competence	Language acquisition via ordinary daily use	Basque										
		Language other than Basque										
	Learning via education	Basque										
		Language other than Basque										
Prospective language competence related dominance configuration table												
Inference												

**PROSPECTIVE PARAMETER: 4C, 4D, 4E  
AND CONTRASTIVE PARAMETER**

Analytical parameter	Prospective parameter			
	4C - Expected future language structure	Prediction about language structure	Global description	Basic linguistic features
				Interlinguistic distance
			Result of language contact	Interference and loanwords
				Code-switching
				Degree of standardisation
			Internal uniformity of language	Degree of fragmentation
				Type of standardisation
	Power and solidarity indices			
	Significant source (onomastics, paremiology and etymology)			
	Other			
	Inference			
4D - Expected future societal features	Prediction about societal features	General, undetermined		
		Demographic features		
		Econotechnical features		
		Political-operative features		
		Psychosocial and sociocultural features		
		Inference		
4E - Expected future language attitudes	Prediction about language attitudes about what?	Language use: A		
		Speakers and their language competence: B		
		Languages: C		
		Ethnicity: D		
		Language attitudes: E		
		Other		
		Inference		
Contrastive parameter				
5A - Language use contrasted with ideal	Contrasting language use	General, undetermined		
		Problematic		
		Unproblematic		
		Contrastive language use related dominance configuration table		
	Inference			
	5B - Language competence contrasted with ideal	Contrasting speaker's linguistic repertoire		
		Contrasting language competence	General, undetermined	
			Problematic	
			Unproblematic	
		Contrasting acquisition of language competence	General, undetermined	
Problematic				
Unproblematic				
Contrastive language competence related dominance configuration table				
Inference				
5C - Language structure contrasted with ideal	Contrasting language structure	General, undetermined		
		Problematic		
		Unproblematic		
Inference				
5D - Societal features contrasted with ideal	Contrasting societal features	General, undetermined		
		Problematic		
		Unproblematic		
Inference				
5E - Language attitudes contrasted with ideal	Contrasting language attitude	General, undetermined		
		Problematic		
		Unproblematic		
	Inference			

**PRESCRIPTIVE PARAMETER: 6A, 6B**

Analytical parameter	Prescriptive parameter	6A - Language status planning	Socio-philosophical underpinnings					
			Degree of overtness	Indirect planning	Positive outcome	Basque	Language other than Basque	
					Negative outcome	Basque	Language other than Basque	
					Direct planning	Positive outcome	Basque	Language other than Basque
						Negative outcome	Basque	Language other than Basque
				Goal of language planning		General, undetermined	Basque	
							Language other than Basque	
					Requiring use	As above		
					Increasing use	As above		
			Maintaining use		As above			
			Compartmentalizing use		As above			
			Limiting use		As above			
			Prohibiting use		As above			
			Other	As above				
			Stage of language planning	General, undetermined				
				Planning proposal				
				Norm selection				
				Implementation of status planning				
				Evaluation of status planning				
			Actor	<b>Table J</b>				
Directionality: top-down/bottom-up	Bottom-up planning							
	Top-down planning							
	Other							
Target group	<b>Table K</b>							
Opinion on status planning								
Reason for 6A								
Inference								
Analytical parameter	Prescriptive parameter	6B - Language acquisition planning	Socio-philosophical underpinnings					
			Degree of overtness	Indirect planning	Positive outcome	Basque	Language other than Basque	
					Negative outcome	Basque	Language other than Basque	
					Direct planning	Positive outcome	Basque	Language other than Basque
						Negative outcome	Basque	Language other than Basque
				Goal of language planning		Planning of speaker's linguistic repertoire		
					Language proficiency requirement	Basque	Required	
						Language other than Basque	Preferred	
						Not considered		
						Other		
						<b>As above</b>		
			Language acquisition planning		General, undetermined	Basque		
				Language other than Basque				
				Requiring acquisition of language competence	As above			
				Increasing language competence	As above			
				Maintaining language competence	As above			
				Compartmentalizing language competence	As above			
				Limiting acquisition of language competence	As above			
				Impeding acquisition of language competence	As above			
Other	As above							
Stage of language planning	General, undetermined							
	Planning proposal							
	Norm selection							
	Implementation of language acquisition planning							
	Evaluation of language acquisition planning							
Actor	<b>Table J</b>							
Directionality: top-down/bottom-up	Bottom-up planning							
	Top-down planning							
	Other							
Target group	<b>Table K</b>							
Opinion on language acquisition planning								
Reason for 6B								
Inference								

<b>Table K</b>
Whole population
Group defined by profession
Group defined by ethnic features
Group defined by language
Group defined by territory
Group defined by individual criteria
Group defined by age
Group defined by gender
Other

<b>Table J</b>
Authority
Individual
Organised group
Other



**PRESCRIPTIVE PARAMETER: 6C, 6D eta 6E**

Analytical parameter	Prescriptive parameter	6C - Language corpus planning	Socio-philosophical underpinnings						
			Degree of overtness	Indirect planning	Positive outcome	Basque			
					Negative outcome	Language other than Basque			
				Direct planning	Positive outcome	Basque			
					Negative outcome	Language other than Basque			
					Positive outcome	Basque			
					Negative outcome	Language other than Basque			
			Goal of language planning	General, undetermined		Basque			
				Purifying language		Language other than Basque			
				Naturalising interference		As above			
				Standardising language		As above			
				Language codification	Graphization	As above			
					Grammatication	As above			
					Lexication	As above			
					Pronunciation	As above			
					Other	As above			
				Developing intertranslatability		As above			
				Language cultivation		As above			
				Abstand-Ausbau		As above			
			Other		As above				
			Stage of language planning	General, undetermined					
				Planning proposal					
				Norm selection					
				Implementation of corpus planning					
				Evaluation of corpus planning					
			Actor	Table J					
			Directionality: top-down/ bottom-up	Bottom-up planning					
				Top-down planning					
				Other					
			Target group	Table K					
Opinion on corpus planning									
Reason for 6C									
Inference									
Analytical parameter	Prescriptive parameter	6D - Planning for societal features	Socio-philosophical underpinnings						
			Point of intervention	General, undetermined					
				Demographic features					
				Econotechnical features					
				Political-operative features					
				Psychosocial and sociocultural features					
			Opinion on planning for societal features						
			Reason for 6D						
			Inference						
			Analytical parameter	Prescriptive parameter	6E - Planning for language attitudes	Socio-philosophical underpinnings			
						Degree of overtness	Indirect planning	Positive outcome	Basque
								Negative outcome	Language other than Basque
							Direct planning	Positive outcome	Basque
								Negative outcome	Language other than Basque
								Positive outcome	Basque
								Negative outcome	Language other than Basque
						Goal of language planning	Influencing attitudes about language use		
							Influencing attitudes about speakers and their language competence		
							Influencing attitudes about language structure		
							Influencing attitudes about ethnicity		
							Influencing attitudes about language attitudes		
							Other		
						Stage of language planning	General, undetermined		
							Planning proposal		
							Norm selection		
							Implementation of planning for language attitudes		
							Evaluation of planning for language attitudes		
						Actor	Table J		
						Directionality: top-down/ bottom-up	Bottom-up planning		
							Top-down planning		
Other									
Target group	Table K								
Opinion on planning for language attitudes									
Reason for 6E									
Inference									

## FEATURES OF QUOTATION AND DATA STRENGTH

Features of quotation	Monograph	[Title of paper]	
	Nature of quotation	Audiovisual	
		Image	
		List	
		Map	
		Questionnaire	
		Sound	
		Statistics	
		Table	
		Text	
		Other	
		Embedded quotation	
	Language mentioned in quotation	Aquitainian	
Arabic			
Basque		General, undetermined	
		Standard Basque	
		Basque popular language	
		Written variety of Basque	
Basque pidgin			
French			
Iberian			
Latin			
Spanish			
Romance	Castilian Romance of Basque Autonomous Community area		
	Navarre-Aragonese		
	Gascon		
	Other Occitan language		
	Other		
Other language			
Language of quotation	Basque		
	Spanish		
	Latin		
	French		
	English		
	Other		
Data strength	Closeness to source	Primary information	
		Secondary information	
		Third-level information	
		Fourth-level information	
		Apocryphal	
	Strength of evidence	Direct testimony	
		Direct mention	
		Indirect mention	
		Individual opinion	
	Relevance to research		





