

# 英語学習者のための「方略的能力」テストの研究開発

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## はじめに

英語教育界は学校種の違いに関係なくコミュニケーション能力の育成に躍起になっている。その熱気自体は喜ばしいことで、英語教育のあらゆる領域・分野でその目標達成にむけて知恵をしぼり、指導と評価の工夫・改善を試みるのは良いことと思われる。

「コミュニケーション能力」の概念をどのように規定するかについては、1980年代から既にくつかの提案がなされ、多少のバリエーションはあれ、ほぼ「基本形」のようなものが確定している (Tarone: 1981, Savignon: 1983, Bachman: 1990, Celce-Murcia et al.: 1995, Bachman and Palmer: 1996)。いずれの「仮説」も、「コミュニケーション能力」はいくつかの「下位構成素」(sub-component) から成るとしている。

その「下位構成素」のうちで学校教育の中であまり力点をおいて指導されてこなかった構成素はといえば Strategic competence ではなからうか。日常生活のなかでコミュニケーションが挫折したり、頓挫する場面は多い。そうした場合、もっとも必要になるのはコミュニケーションを「修復」する能力であると考え。また、もっと大切なことは、そうした事態に陥らぬようコミュニケーションの過程で挫折を「予防」する能力ではないかと思う。これら2種類の能力こそ Strategic competence と総称して呼ばれる能力である。

小論は日本人英語学習者の Strategic competence を「簡便に」測定・評価できるテストを開発し教育現場での指導と評価に活用したいとの願いを込めて、その開発の過程を論述するものである。

## Strategic competence の概要

テストの詳細について言及する前に、Strategic competence を支える「下位構成素」として諸学者がどのようなもの考えているかを少しまとめておきたい。コミュニケーション方略（以下 CS とする）に関する研究は、話者がおかれた発話の社会的状況（例えば対人関係）や話者の心理的状況（例えば、発話に対する不安や話者の性格）といった要因をどう捉えるか、また、初期の研究は談話面からではなく語彙面だけに関心が寄せられていた、などの課題があったと言われている (岩井 2002: 79-83)。

CS 研究の創始者が話題になる時に必ず言及されるのが Tarone (1981) である。その後 Faerch & Kasper (1983) や Bialystok (1990) などの研究が続くが、いずれも Tarone の考えたモデルを参考にしていると考えてもよい。彼女は以下のような定義と分類を示している (岩井によると初出は1977である)。

Communication strategies are descriptive of the learners' pattern of use of what they know as they try to communicate with speakers of the target language. (CS とは、学習者が目標言語の話者と意志疎通を図ろうとする場合の知っていることをどのように活用しているかのパターンを記述したものである。)

(1) Paraphrasing (言い換え):

近似的表現: 正しくないとは承知しているが、話し手を満足させるのには十分な意味的特徴を共有する目標言語の単語や構文を使用すること。

造語: 表したい概念を伝えるために語を作り出すこと。

遠回しな表現: 適切な表現や構文を使う代わりに、その事物や行動の特徴や要素を描写すること。

(2) Borrowing (借用):

直訳: 単語ごとに母語で訳すこと。

言語切り替え: 訳すことをせず、母語の表現をそのまま用いること。

(3) Appeal for assistance (援助の要請): 適切な表現を尋ねること。

(4) Mime (身振りの使用): 語彙表現を用いずに非言語的方略や行動を用いること。

(5) Avoidance (回避):

話題の回避: 目標言語の表現や構文を知らない概念については、ただ単に話さないようにする。

メッセージの回避: ある概念について話し始めるが、続けることができなくなり、途中で止めること。  
(Tarone, 1981: 286-287)

次に言語学習方略という視点から CS に触れているものに Oxford (1990) があり、Direct Strategies の 1 つとして Compensation Strategies をあげている。彼女は、「補正方略」とは「言語学習 4 技能すべてにおける知識の限界を乗り越えることを手助けする」とし、具体例として次のようなものを示している (p.91)。

A. 知的推論をすること (Guessing intelligently)

1. 言語的手がかりを使うこと (Using linguistic cues)

2. その他の手がかりを使うこと (Using other cues)

B. 話したり書いたりする時に限界を乗り越えること (Overcoming limitations in speaking and writing)

1. 母語へ切り替えること (Switching to the mother tongue)

2. 援助を求めること (Getting help)

3. 動作やジェスチャーを使うこと (Using mime or gesture)

4. 部分的あるいは全体的な意志疎通を回避すること (Avoiding communication partially or totally)

5. 話題を選択すること (Selecting the topic)

6. メッセージを調節したり近似的なものを用いること (Adjusting or approximating the message)

7. 単語を作り出すこと (Coining words)

## 8. 遠回しな説明や同意語を使うこと (Using a circumlocution or synonym)

また、カリキュラム改革 (curriculum reform)・試験問題の開発・教科書編集・教育課程編成 (course design) などの際の指針として高い評価を得ている *Threshold Level 1990* (Council of Europe 1991) では、言語機能を大きく6つに分類し、その6つめとして「Communication Repair (コミュニケーションの修復)」を示している。(ちなみに米山・松沢 (1998: 90) による *Threshold Level 1990* の日本語訳版では、Compensation Strategies を「補償方略」としている。) さらに5つめの分類である「Structuring Discourse (ディスコースを組み立てる)」の中にも、CS と考えられるものがある (例えば「ためらう」「言葉を探す」「自分の発言を訂正する」など)。

### 「学習指導要領」における CS に関する記述

このような外国語教育における CS 研究への関心の高まりや発展を受け、「中学校学習指導要領」ならびに「高等学校学習指導要領」(平成10年, 11年告示) においても CS 指導を意識した文言が見られる。

[中学校, p.89]

- ・話し手に聞き返すなどして内容を正しく理解すること。
- ・つなぎ言葉を用いるなどいろいろな工夫をして話が長くように話すこと

[高等学校, p.120]

- ・繰り返しを求めたり、言い換えたりするときなどに必要となる表現を活用すること。

これは教科の目標の一つとして「実践的コミュニケーション能力の育成」を目指す流れの中で、Strategic competence を伸長させるための指導・評価が日本の英語教育界においても市民権を得たことを示している。

### Strategic competence test で検査する項目

上記の学者いずれもが「コミュニケーション能力」の構成素として Strategic competence を取り込んだ「仮説」を提案しているが、筆者らは Celce-Murcia et al. (1995) の「仮説」を軸としてテストの研究開発を進めることにした。この「仮説」に依拠することにしたのは、何よりも外国語教授・学習を念頭において構想された「仮説」であるため、日々学習者をあずかる英語教員にとって実践的、また、きわめて示唆的であるからである。

この「仮説」によると、Strategic competence は以下の要素からなるとしている。テストにおいてはそれらをできる限り万遍なく検査することが望ましい。

#### AVOIDANCE or REDUCTION STRATEGIES

- － Message replacement
- － Topic avoidance
- － Message abandonment

#### ACHIEVEMENT or COMPENSATORY STRATEGIES

- － Circumlocution

- Approximation
- All-purpose words
- Non-linguistic means (\*)
- Restructuring
- Word-coinage
- Literal translation from L1
- Foreignizing
- Code-switching
- Retrieval

#### STALLING or TIME-GAINING STRATEGIES

- Fillers, hesitation devices and gambits
- Self and other-repetition

#### SELF-MONITORING STRATEGIES

- Self-initiated repair
- Self-rephrasing

#### INTERACTIONAL STRATEGIES

- Appeals for help
  - direct
  - indirect
- Meaning negotiation strategies

#### *Indicators of non/mis-understanding*

- Requests
  - repetition requests
  - clarification requests
  - confirmation requests
- Expressions of non-understanding
  - verbal
  - non-verbal (\*)
- Interpretive summary

#### *Responses*

- repetition, rephrasing, expansion, reduction, confirmation, rejection, repair

#### *Comprehension checks*

- whether the interlocutor can follow you
- whether you said was correct or grammatical
- whether the interlocutor is listening
- whether the interlocutor can hear you

(Celce-Murcia et al.: 1995, 28)

(\*は筆者らによるもので非言語的な strategies を示す。)

## テスト開発の基本方針

Celce-Murcia らが列挙している Strategic competence のテストは Oral Interview の形式で行うのが理想的である。面接形式を用いることにより、非言語的な strategies (上記リストの\*印参照)を含めた、列挙されている下位構成素全てを検査できるからである。しかしながら本テストではその形式は採らないこととした。下位構成素のうち、まずはペーパー・テストで検査できるものだけに対象を絞ることにした。Strategic competence の構成素すべてを検査しなくても学習者のこの能力を推定できるのではないかと考えたからである。ペーパー・テストとは言え Strategic competence の主要な構成素はカバーしたつもりである。

各問いは対話形式を用いることにした。一文のみの提示では言語の使用場面やその機能をイメージしにくいからである。なお、事後処理を簡単にするために多肢選択形式にした。また、本テストで測ろうとしている能力は、コミュニケーション場面における挫折の修復や予防といった Strategic competence の中核的な下位構成素を扱っているために、選択肢の中には談話のスムーズな展開・拡張に貢献してしまうものが多く、それらの作成にも細心の注意を払った。

## 今後の課題

上述のように Strategic competence の下位構成素を全て検査するテストとしては Oral Interview の形式が最適である。今後、そのためのタスクとしてどのようなものが適切であるか綿密な検討を行おうと考えている。本試作テストはそのための準備段階と位置付けている。

このように本テストは限定的な機能しか期待できないものであるが、これを授業中に実施し、その出来ばえを精査することにより学習者のおおよその Strategic competence は推定できるものと期待している。今後、より充実したこの領域のテストが提案されることを願っている。

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【参考】 英語学習者のための「方略的能力」テスト模範解答

(1)	b	(6)	c	(11)	d	(16)	b	(21)	c	(26)	d
(2)	b	(7)	b	(12)	d	(17)	d	(22)	a	(27)	a
(3)	b	(8)	d	(13)	b	(18)	d	(23)	a	(28)	b
(4)	b	(9)	c	(14)	a	(19)	c	(24)	d	(29)	a
(5)	c	(10)	c	(15)	b	(20)	b	(25)	a	(30)	c

## Strategic Competence Test for English Learners

空所に入るべき最もふさわしい英語を (a), (b), (c), (d) の中から選びなさい。

[Directions] Fill in each blank with the most appropriate phrase or sentence to match the situation. Choose the best one from (a), (b), (c), or (d).

(1)

A: There're so many motorbikes left around here. We can't walk!

B: Generally speaking, regulations on vehicles aren't strict. Don't you think so?

A: ( ) Do you have any plans for the summer vacation?

- (a) They say, "First come, first served."
- (b) Let's talk about something pleasant.
- (c) Long time no see! How have you been?
- (d) It's my pleasure. That's a small thing.

(2)

A: The stars are lovely this evening. Look at the Big Dipper up there !

B: Sorry?

A: The Big Dipper. It's across the Milky Way.

B: You said diaper? ( ). Never mind. Just watch the beautiful sky.

- (a) Mary had a new born baby.
- (b) If only I had a dic ....
- (c) Thank you indeed.
- (d) OK, I'll do it.

(3)

A: Here's an expensive Italian wine. Where's a corkscrew ?

B: Pardon? Did you say cork ...?

A: ( )

- (a) The country you want to visit.
- (b) The thing you open bottles with.
- (c) The drink you like best.
- (d) The expensive wine I sometimes drink.

(4)

A: Excuse me. Which computers are on sale this week?

B: ( )

A: You mean 'asterisk'?

B: Yes, this mark, sir.

- (a) The sale begins tomorrow.
- (b) The machines with ... the mark.
- (c) All of the machines are on sale.
- (d) New models are coming up next week.

(5)

A: Why were you late this morning ?

B: The road was very ... ( )

- (a) There were many trees on both sides of the road.
- (b) There were few cars on the road.
- (c) There were an enormous numbers of cars on the road.
- (d) There was no noise on the road.

(6)

A: George, I'll clean up your room. ( )

B: Oh, you mean the vacuum cleaner. It's in the next room. But I'll do it by myself, Naomi.  
Thanks anyway.

- (a) When was the dishwasher broken?
- (b) How much is the rent for your apartment?
- (c) Where is the sweeping machine?
- (d) Where is the nearby laundry?

(7)

A: Nice to meet you, Aya. Are you a student or do you work?

B: I'm not a student anymore. ( )

A: We say you are an 'office worker' in English.

B: Oh, yes. I'm an office worker.

- (a) I quit my job.
- (b) I'm an ... 'OL'.
- (c) I want to be a student again.
- (d) I use some English in the office.



(8)

A: Wow, you made this movie by yourself? I'm shocked. Where did you find that snake?

B: ( ) It turned out pretty well.

A: Wow, cool!

B: That's a movie industry secret. Don't tell anyone!

- (a) Cool, isn't it? I really like that rattlesnake.
- (b) The thing is, there are no snakes anywhere around here.
- (c) To be sure, I found that white snake to be unique.
- (d) Well, er, actually it's computer-generated.

(9)

A: Before you leave for Australia, how about if we have lunch together? For example, this Friday?

B: ( ) I'd like to, but I don't know if I can squeeze it into my schedule.

A: That's OK. It's not important. We'll do it after you get back.

- (a) Yeah, our trip will be really fun!
- (b) Sounds great. I admire you.
- (c) Lunch ... This Friday ...
- (d) OK. Let's definitely meet on Friday.

(10)

A: So, you seem to have successfully survived for a long time in a foreign culture. What's the key to doing it?

B: Hmm, I'd say that, to easily get used to a new culture, age is important. ( ) if you go when you are young, you can easily accept new ideas.

A: Yeah, maybe that's right.

- (a) However,
- (b) In addition,
- (c) I mean,
- (d) On the contrary,

(11)

A: I need to lose weight, so I've started to go to the gym.

B: How often?

A: Mondays, Wednesdays, and Fridays. In other words, ( )

- (a) every three days.
- (b) the gym is open every day.
- (c) the gym is closed on Mondays.
- (d) every other day.

(12)

A: What's this, Satoshi?

B: It's 'Omochi', Susan. It's made of rice. ( )

A: 'Rice cake'.

- (a) When do you eat it?
- (b) What's the Japanese word for it?
- (c) How do you make it?
- (d) How do you say it in English?

(13)

A: Isaac Asimov really had some quirks.

B: ( )

A: You know, some strange habits. For example, he hated cars and planes. So he almost always stayed in New York.

B: Wow, that is unusual.

- (a) Ha, ha, ha!
- (b) Quirks?
- (c) That's terrible.
- (d) That's incredible!

(14)

A: Hi, Ken. How's everything?

B: Not bad, Rob. Thanks for the nice mail, but ( )

A: It's an abbreviation for 'as soon as possible'. We often use those kinds of short forms.

- (a) I didn't understand the last phrase, ASAP.
- (b) You didn't say any time limit for this.
- (c) I don't know how to thank you enough.
- (d) I couldn't read it as I use a different software.

(15)

A: Where to, ma'am?

B: To the New Hiroshima Hotel, please.

A: ( )

B: The New Hiroshima Hotel.

- (a) Is it near the station?
- (b) Sorry. Pardon me?
- (c) It takes about 10 minutes.
- (d) You can walk to the hotel.

(16)

A: This remote controller doesn't seem to work. I'm afraid the battery's dead.

B: ( )

A: The battery is old, so we need to put in a new one.

- (a) Does the battery fit the controller?
- (b) What do you mean by 'dead'?
- (c) How do you get rid of the dead battery?
- (d) How much is the battery?

(17)

A: I sent you an e-mail a couple days ago, but it bounced.

B: ( )

A: Yes. My mail didn't reach you and it was kicked back.

- (a) Didn't you read my response?
- (b) Did you send an e-mail to the married couple?
- (c) Do you like sending mails?
- (d) Did you say "it bounced"?

(18)

A: Now that's all you have to do if you want to change the ringing mode to the silent mode.

B: ( )

A: That's OK. Then, this time you could try it by yourself. I will read you the directions again.

B: Thanks.

- (a) I don't like the ringing sounds of mobile phones in the trains.
- (b) It's quite easy. I'm sure I can do it by myself.
- (c) I have tried many times and finally could change the mode.
- (d) I'm not sure I understand exactly.

(19)

A: Steve, we've been married for 25 years now and I'm always happy with you.

B: Yes, but the best is yet to come!

A: ( )

B: Of course!

- (a) Are you sure you are never happy?
- (b) Did you know this is our 26th anniversary?
- (c) You mean you will make me happier?
- (d) Married life is sometimes very boring.

(20)

A: Hello. Is this ABC Fitness Club?

B: Sorry?

A: ( )

B: No. I'm afraid you have the wrong number.

- (a) Tell me how to get to ABC Fitness Club.
- (b) Is this ABC Fitness Club?
- (c) That's OK. Never mind.
- (d) Do you know the phone number for the gym?

(21)

A: Joe, we're planning a surprise birthday party for Naomi next Sunday. Would you like to join us?

B: Yes, of course. But is it this coming Sunday or Sunday next week?

A: ( )

B: OK. I think I can go.

- (a) This Sunday is too soon for me.
- (b) I'm always busy on Sundays.
- (c) I mean on the 24th not on the 17th.
- (d) You don't have a part-time job on Sundays, do you?

(22)

A: Did you lock up the house?

B: Yes, I did. ( )

- (a) I checked it twice.
- (b) I went upstairs.
- (c) I made a new spare key.
- (d) I threw it on the roof.

(23)

A: Mr. Yamamoto went to a casino in Honk Kong and lost \$30,000!

B: What? Say it again.

A: ( )

B: Crazy!

- (a) He lost \$30,000 at a casino in Hong Kong.
- (b) He lost \$30,000 on his way to a casino.
- (c) He borrowed \$30,000 from me to play at a casino.
- (d) He paid \$30,000 for his trip to Hong Kong.

(24)

A: I have two tickets for the movies, Naomi.

B: Oh, I wish I could go. I'm afraid I have to finish my report by tomorrow.

A: ( )

B: Well, I guess not.

- (a) Who can help you with the report?
- (b) You like the movies?
- (c) So you are free this evening.
- (d) Then you can't make it?

(25)

A: I heard you quit your job. Did you have any problems in the office?

B: Well, ... ( )

A: Sorry. I shouldn't have asked such a personal question.

- (a) I'd rather not talk about it.
- (b) I liked my office atmosphere very much.
- (c) I was very happy in my office.
- (d) Getting a job is very tough these days.

(26)

A: This ring was a really good buy. This is for you, Sayuri.

B: 'A good buy'? Is this the end of us?

A: ( )

- (a) No. We shouldn't meet any more.
- (b) No, but we can buy it anytime.
- (c) No. I can buy you more any time.
- (d) No, no, Sayuri. 'A good buy' means a real bargain.

(27)

A: "Nothing ventured, nothing gained." Unless you take risks, you'll get nothing.  
( )

B: Yes. I think I'm following what you're saying.

- (a) Are you with me so far?
- (b) Are you for or against taking risks?
- (c) Do you like love romance?
- (d) Are you following somebody?

(28)

A: Hiroshi, I just love this teriyaki chicken. Tell me how to cook it.

B: I use grapefruits and honey to make the sauce and soak the chicken in it overnight.  
They are my 'hidden spices'. ( )

A: We say 'the secret ingredients' in English but people can understand that expression.

B: Oh, I'm glad to hear that.

- (a) Is 'spice' the key ingredient?
- (b) Is that the correct expression?
- (c) Do you have different spices in your country?
- (d) Is teriyaki chicken getting popular?

(29)

(On the phone)

A: Then I went to the police to report the accident right away.

B: ... ( silence for several seconds )

A: ( )

B: Sorry. I was boiling water and the kettle whistled. What did you say?

- (a) Hello? Are you still there?
- (b) Did the police say "Silence is golden." ?
- (c) Did the police say anything about the kettle?
- (d) So, the police called on me?

(30)

A: ( )

B: I'm afraid not. We can't hear you.

A: OK. I'll speak up.

- (a) Can you speak to me now?
- (b) Am I talking too slowly?
- (c) Can you hear me?
- (d) I didn't like your story.

Strategic Competence Test で検査する項目チェックリスト

AVOIDANCE or REDUCTION STRATEGIES	問題番号	チェック欄
Topic avoidance	1	
Message abandonment	2	
ACHIEVEMENT or COMPENSATORY STRATEGIES		
Circumlocution	3	
Approximation	4	
Restructuring	5	
Literal translation from L1	6	
Code-switching	7	
STALLING or TIME-GAINING STRATEGIES		
Fillers, hesitation devices and gambits	8	
Self and other-repetition	9	
SELF-MONITORING STRATEGIES		
Self-initiated repair	10	
Self-rephrasing	11	
INTERACTIONAL STRATEGIES		
Appeals for help		
direct	12	
indirect	13	
	14	
Meaning negotiation strategies		
Indicators of non/mis-understanding		
Requests		
repetition requests	15	
clarification requests	16	
confirmation requests	17	
Expressions of non-understanding		
verbal	18	
Interpretive summary	19	
Responses		
repetition	20	
rephrasing	21	
expansion	22	
reduction	23	
confirmation	24	
rejection	25	
repair	26	
Comprehension checks		
whether the interlocutor can follow you	27	
whether what you said was correct or grammatical	28	
whether the interlocutor is listening	29	
whether the interlocutor can hear you	30	

## ABSTRACT

### Developing a Strategic Competence Test for English Learners

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Communicative competence is thought to consist of several major competences. One of these, namely strategic competence, did not used to get valid attention in foreign language classrooms. However, the importance of developing the strategic competence of students has become a focal point and is now one of the hottest interests among researchers, practitioners, curriculum designers, and text-book writers. This paper presents the theoretical background for designing a 'Strategic Competence Test,' and also gives examples of test items for assessing the strategic competence of learners.

The first part of the paper discusses the theoretical issues:

- (1) 'Strategic competence' is defined as the competence to repair communication breakdowns and to avoid such possibilities.
- (2) Sub-components for sustaining strategic competence are examined from different fields of research: communication strategies (Tarone, 1981), language learning strategies (Oxford, 1990), and curriculum development (Council of Europe, 1991).
- (3) The Courses of Study for secondary schools in Japan mention the necessity of developing some fundamental communication strategies to nurture learners' communicative competence.

Secondly, specific strategies for assessing foreign language learners' strategic competence are presented based on Celce-Murcia et al. (1995). Some considerations for developing a 'Strategic Competence Test' are as follows:

- (1) We do not give an oral interview test, which is very authentic but very time-consuming to conduct. Therefore, a written test is used instead.
- (2) We include as many different strategies in the test as possible so that the results will portray a holistic idea of learners' strategic competence. We make 30 test items for checking 29 different strategies.
- (3) We use dialogues rather than single independent utterances, because the former are very interactive and test-takers can easily figure out actual situations for language use and its functions.
- (4) We use a 'multiple-choice question format' so as to save teacher's time when marking. Lastly, 30 test items for examining-learners' strategic competence are presented. The



authors hope that foreign language teachers can formulate some ideas on which strategies their students are familiar with and also on which strategies students find difficult to use in foreign language communication.