

Education Reform and the Quest for Excellence

The Hong Kong Story

Edited by Lok Sang Ho, Paul Morris and Yue-ping Chung



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The image shows a vertical column of four square characters in calligraphy, representing the Chinese name of Hong Kong University: 香 (top), 港 (second), 大 (third), and 學 (bottom). Each character is contained within a square frame, a style known as Square Word Calligraphy.

Hong Kong University Press is honoured that Xu Bing, whose art explores the complex themes of language across cultures, has written the Press's name in his Square Word Calligraphy. This signals our commitment to cross-cultural thinking and the distinctive nature of our English-language books published in China.

"At first glance, Square Word Calligraphy appears to be nothing more unusual than Chinese characters, but in fact it is a new way of rendering English words in the format of a square so they resemble Chinese characters. Chinese viewers expect to be able to read Square word Calligraphy but cannot. Western viewers, however are surprised to find they can read it. Delight erupts when meaning is unexpectedly revealed."

— Britta Erickson, *The Art of Xu Bing*

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1

Driving for Excellence: An Introduction to the Volume

Lok Sang Ho, Paul Morris and Yue-ping Chung

The forces of globalization and the rapid advance of science and technology have prompted governments all over the world to introduce a plethora of reforms to their education systems in the hope that they will make their respective workforces and economies more productive and competitive. There is little doubt that the already keen and intense competition we have seen in the past decade will only get keener and more intense in the years to come. The winners will be those who excel in this highly competitive environment. Hong Kong, long opened to the winds of globalization, is beyond doubt under much pressure to shape up and partake in this global drive for excellence.

However, how does education reform enhance a country's competitiveness and what do we mean by excellence? For whom is "excellence" intended? Education, in general, can enhance two kinds of skills: job skills and life skills. A knowledge-based, market-driven economy requires its workers to be well equipped in information technology skills, engineering skills, marketing skills, negotiating skills, presentation skills, and other professional skills. But life skills may be even more important, for it is life skills that determine if someone will endure, if he can face adversities, and if he is going to be a happy person or an unhappy person. Life skills are skills in communication, emotion-management, time management, reflective skills, interpersonal skills, organizational skills, general skills to learn and to adapt and, gaining in importance by the day, sheer stamina; the capacity to persevere and to fight against all odds relentlessly. People with excellent life skills are confident, strong, and adaptive. Witness the number of titles released on EQ (emotional quotient, and then empathy quotient), AQ (adversity quotient, and then autism quotient), SQ (spiritual intelligence, and then system quotient), and so on. The proliferation of various "quotients" related to personality and traits is not entirely a fad.¹ There is indeed more to education than knowledge and traditional job-related skills. Will the current waves of education reform enhance these generic skills in the way they plan to do? Will education reform achieve its various goals and enhance the effectiveness of education? The fact

is, apart from being happier persons, which is admittedly quite important, often times it is people with stamina and endurance who finally out-compete others in the long run.

Even more important, will education increase the chances of skilled people using their skills in socially productive work? The recent revelation about the lack of business ethics in America's corporate sector through the Enron and WorldCom debacles, which must have prevailed for over a decade, suggests that while creative accounting and innovative financial engineering may spur investment and drive economic growth for a time, such growth is of low quality, cannot be sustained, and ultimately exacts a heavy price on society. Because it exacts a heavy price on the entire society and even humanity it could be considered as the very opposite of "excellence." Education must not just produce knowledgeable and skilled people, but should produce people with integrity. Better still, education should nurture a new generation, and future generations, of people who care about the wider interests of society. Indeed, as Pritchett (2001) put it so aptly, we do not need highly knowledgeable and skillful pirates. The fact that knowledgeable and educated people engage in activities that make private gains at the expense of society at large is one possible reason why any statistical link between education and economic growth seems to be weak (Pritchett, 2001). Thus, increasingly, voices are raised which fundamentally question the role and value of education as a source of economic growth (Wolf, 2002), especially as societies extend the provision of tertiary education to more and more people.

The present volume is unique in that we want not so much to document the frustrations and difficulties faced by education reformers in specific jurisdictions or how they succeed in their endeavours but to throw light on how education reform should proceed. In this, we set out to offer some directions for education reformers. We intend to warn education reformers against possible pitfalls and false guideposts. The volume sets out to be prescriptive more than descriptive. The issues faced by education reformers all over the world are strikingly similar. The reasons are obvious: education deals with people; there are diverse interests among people; people are sensitive to risks and incentives; there are market failures and government failures; there are political and information constraints, and so on. For these reasons, while the cases covered in this volume are focused on Hong Kong, they are no less useful in throwing light on the direction of education reform all over the world.

It is important to note that the nature of reform has now gone far beyond the expansion of each level of schooling. The past 30 years have seen the provision of universal access to primary schooling across much of the world, and even secondary and tertiary education have become much more accessible in many countries. Education reforms in the new millennium have increasingly focused on promoting quality, rather than quantity. This is as it should be,

for “excellence” refers to quality, not quantity. However, because quantities are far easier to observe than quality, there is still a tendency to emphasize quantitative measures such as the number of teachers with university and higher degrees, the number of teachers with training in a specific category of education, and enrolment figures. Without the education reformers being aware of it, the drive for excellence easily degenerates into a pursuit of the mundane and of mediocrity. Teachers with university degrees are not necessarily better than teachers without them if university enrolment expands faster than the number of well qualified applicants. University professors with more refereed journal articles published are not necessarily better teachers and can be poor role models for the younger generation if they have lost interest in serving society or in addressing local needs. On a more macro scale, there may be too much emphasis on the *quantity of economic growth* to the neglect of the *quality of growth*. As alluded to earlier, clever financial engineering and innovative accounting may result in an increase in perceived wealth and boost economic growth in the short term but such growth is of low quality and may not be sustained. Moreover, abundant evidence shows that child mortality rates tend to be lower if the education level of the mother is higher, suggesting that education may enhance the quality of life without necessarily raising the measured rate of economic growth. We may well look for the value of education beyond the traditional terms of reference, which are too narrowly focused on economic growth and market-driven values, and we will do well to evaluate the success of education reform from a broader perspective.

The authors of the papers in this volume come from diverse backgrounds, and include economists, political scientists, a journalist, and education scholars whose specializations cover education administration, curriculum reform, and education policy. They analyze a range of key issues, from the nature of value-added in education to the dynamics of curriculum reform, from what makes an effective education reform strategy to the role of public perceptions and the mass media. Their substantive discussions both reflect and question the thinking of policy makers. Without knowing it, the way education reforms are taking shape throughout the world is also changing the value system of our younger generations, and how they will use their skills in the future.

For clarity of argument, apart from the Introduction, the book is divided into four separate, but inter-related parts: (i) Conceptual Frameworks; (ii) Reform of Tertiary Education; (iii) Experiments, Dilemmas, and Risks in Secondary School Reform; and (iv) Ideals Versus Reality: The Interplay of Diverse Interests and Diverse Perceptions. Under the “Conceptual Frameworks” section, Lok Sang Ho’s chapter outlines the nature of the value-added concept in education, and scrutinizes the aspects of institutions and practice that affect the efficiency of education production, namely examinations and assessment, drilling and creativity, autonomy and professionalism, and opportunities for upward mobility. He argues that

effective education may require an institutional set-up beyond the formal education sector, and “must interface with the reality of the society in which the students live.” Ian Scott’s chapter uses post-handover Hong Kong as its focal point and argues that the changing social and political context has a significant effect on policy making. In particular, there is a risk that the activities of diverse interest groups may so circumscribe policy making that the government either loses the perspective of the interest of society at large, or becomes ineffective and lacks the capability and legitimacy to carry out its decisions. Obviously, this political perspective has relevance beyond the context of Hong Kong, and reminds education reformers of the potential difficulties arising from political considerations.

Ho’s chapter on what builds world class universities argues that excellent people, if left alone, will do excellent work. If Hong Kong’s universities can manage to assemble the best minds to work for them (a challenging task!), and provide them with the necessary infrastructure support, the task of building world class universities is more than half done. So long as we have the right people, our universities will grow into world class universities – if left alone, but many of the recent initiatives launched by the University Grants Committee in Hong Kong actually end up depriving the breathing space that universities need.

Charles Wong’s chapter on sub-degrees affirms the Hong Kong government’s strategy of enhancing the quality of Hong Kong’s labour force with the 60 percent target for post-secondary education for the relevant age cohort. The challenge lies in taking advantage of the existing capabilities within the Hong Kong context. Sustainability of this new initiative depends on the ability of the government to meet this challenge.

Apart from these chapters, we have included a chapter, by Jason Tan, on Singapore. In many ways, Hong Kong has close parallels to Singapore. Both are international cities at the forefront of globalization. They are both intent on “excellence” and share the same view that a knowledge-based economy and society is the only path to a viable future. The recent initiative of the Singapore government in reforming the undergraduate admission system for its two public universities is of great interest to all who are concerned about competition and education. From 2003 onwards, universities consider not only the performance of applicants in national examinations, but also their performance in the SAT I reasoning test, project work, and participation in co-curricular activities. In contrast, although Hong Kong is also putting more emphasis on non-academic aspects of students’ performance, it has not formalized the criteria.

In the section “Experiments, Dilemmas, and Risks in Secondary Schools” are four chapters dealing with various kinds of experiments and reforms. Paul Morris and Ian Scott found that the Hong Kong government had, from the colonial days until now, followed largely a top-down approach to education

reform. They found the broader political-economic-cultural environment an important constraint to policy implementation, often compromising its effective implementation during the colonial days, and they saw little promise of a breakthrough under the Tung Chee-hwa administration, notwithstanding his espousal of education as a top priority. Thomas Tse's chapter focuses on Hong Kong's pursuit for educational quality and excellence through greater and greater doses of managerialism and marketization, with not altogether happy results.

The section "Ideals Versus Reality: The Interplay of Diverse Interests and Diverse Perceptions" starts with a chapter by Kwok-chan Lai, Kwok-wai Ko and Elizabeth Lai-man Cheung. They examine recent attempts in Hong Kong to improve the quality of primary education through the upgrading the level of preparation of primary teachers to degree level, and the provision of a number of higher paid graduate posts in primary schools. The authors look closely at how the graduate teacher policy actually operates at the school level, and reports both positive and perverse effects emanating from its implementation. They point to the importance of aligning the organizational structure of schools with a teacher pay system that will facilitate a change in organizational culture and support systemic school reforms. In line with the general thrust of this volume about the need to consider education as more than just providing job skills, Po-king Choi is critical of the "ultra-utilitarianism" displayed by those shaping the language policy in our schools. At the same time, she is aware of the dilemma that faces educators: how to maintain pedagogical soundness while ensuring the access of students to English, which admittedly is important for career building. Edward Vickers, Flora Kan, and Paul Morris's chapter is entitled "Colonialism and the Politics of Chinese History in Hong Kong's Schools". Hong Kong's school history curriculum is unique worldwide in that it consists of two entirely separate subjects — history and Chinese history — which differ not only in content, but also in terms of their pedagogy and their assumptions concerning the nature of history as a discipline. The pattern of curriculum development for history in Hong Kong over the past few decades suggests that the relationship of colonialism to curriculum development may in Hong Kong's case be understood in terms of a mutually convenient collaboration between the government and local educational elites. Chi-kuen Lau's chapter is an excellent overview of the education system in Hong Kong from the point of view of a journalist. He discusses several key controversial issues such as the role of examinations in allocating students to schools, the government initiatives to promote use of the mother tongue as the medium of instruction in schools, the introduction of the direct subsidy scheme (DSS) (much like the charter schools of the United States), and the abolition of the academic aptitude test which had been used as the basis for assigning primary school graduates to secondary schools. Lau's study of the response of the mass media to these issues is a study of mass

psychology and public perception of delicate policy issues that will make interesting reading for those from other areas of the world. Lok Sang Ho then attempts to draw lessons from all the discussions and to summarize some key “prescriptive” recommendations, reflecting on what may close the gap between ideals and reality.

Global trends in education reform often leave us with the impression that there is little escape from marketization, which certainly in itself is a key part of the globalization process. Still, just as pointed out throughout this book, and as William Tabb of the City University of New York says, it will be important to re-appreciate the deeper meanings and the goals of education, such as “enhancing critical citizenship, personal development and the participation in culture that is the right of all students in a democracy.” Instead of, or perhaps in spite of, jumping on the bandwagon of “taking the challenge to join the league of the world’s best 100” or the like, and of taking on high-tech engineering and executive MBAs (without denying their intrinsic values), rediscovering the meaning of the community is at least as important a part of excellence as anything else.

All in all, the collection in this volume demonstrates how daunting the task of education reform is to achieve excellence, and argues that promoting excellence, among other things, should mean promoting excellent life skills so as to enhance the quality of life for those going through the process of education. Together, the authors have contributed much insight to serve as guideposts or warning signs against pitfalls, and they have reminded us of the importance of grasping the political reality and mass psychology, both of which may well compromise the effectiveness of even well considered education reforms.

Notes

CHAPTER 1

1. Some examples include: Paul G. Stoltz, *Adversity Quotient: Turning Obstacles into Opportunities*, John Wiley & Sons (1999); Daniel Goleman, *Emotional Intelligence*, Bantam Books (1995); Hugh Courtney, *20/20 Foresight: Crafting Strategy in an Uncertain World*, Harvard Business School Press (2001); Robert K. Cooper and Ayman Sawaf, *Executive EQ: Emotional Intelligence in Leadership and Organization*, Perigee (1998).

CHAPTER 2

1. According to the 2004–2005 Budget, Hong Kong spends 22.5 percent of its public expenditure and 24.2 percent of its government expenditure on education.
2. See Debbie Roswell “Today’s Child” website at <http://www.angelfire.com/on3/todayschild/discipline.htm/>.
3. “According to research, a person needs three things to be successful: one must feel successful, one must believe that others feel that he or she is successful, and one must have ownership.” What students do and learn at school should enhance this sense of ownership. “Anytime we deny ownership in a class, we increase the possibility of misbehaviour.” See <http://www.disciplinehelp.com/>.
4. “Children learn most naturally by imitation. In their manner of speech and walking, in their habits of thought and feeling, in their grasp of their native language, imitation is one of the foundational laws of learning.” See Douglas Wilson, “Imitation and Imagination,” *Childer*, Vol. 14, Issue 1. See also “The Power of Memes” by Susan Blackmore. *Scientific American*, Vol 283 No 4, October 2000, p 52–61. In response to a letter alleging that imitation and creativity are opposite processes, Blackmore wrote: “This commonsense view is turned inside out by memetic thinking, which treats human creativity as an evolutionary process that depends on human imitation for its copying mechanism. This is why imitation — apparently paradoxically — turns out to be the source of our amazing creativity. I agree that we would do well to study the copying step and the selection step separately, for both are complex and poorly understood. Berger reiterates the usual biologically based argument. The joy of memetics is that it provides a completely different view — that the familiar evolutionary process working on a new replicator

explains how we acquired all these other skills.” February 2001 issue, *Scientific American*.

5. A major grievance among teachers in Hong Kong over the past few years has been the proliferation of initiatives imposed on teachers by bureaucrats. For examples, see Fung (2001).
6. The success of the Kumon system of learning in both enhancing basic skills and confidence testifies to the benefit from correct drilling. The ongoing campaign against “drilling culture” among educators in Hong Kong is quite misplaced.
7. There is also the risk that students used to there being multiple possible answers may lose the ability to judge which is the best answer.
8. The Hong Kong Professional Teachers’ Union organized several big rallies in protest against the government’s introduction of benchmark language tests for teachers.
9. See International Association for the Evaluation of Educational Achievement website, <http://www.iea.nl/Home/home.html/>.
10. The CDC document (1999) named seven core areas for learning in basic education: English, mathematics, Chinese, science, technology education, personal social and humanities education, arts and physical education. The CDC also encouraged the enhancement of interpersonal skills and lifelong learning skills. Depending on how this is interpreted, one can argue that the CDC’s proposal includes job skills and life skills.

CHAPTER 3

1. More discussion on this and the Education (Amendment) Ordinance 2004 that ensued can be found in chapter 13 of this book [Eds].
2. See “Part IV: Ideals Versus Reality” [Eds].
3. I use the term here in its literal and restricted sense of many centres of power. In Dahl’s definition, a polyarchy is a political order in which “citizenship is extended to a relatively high proportion of adults, and the rights of citizenship include the right to oppose and vote out the highest officials in the government” (Dahl, 1989, p.220). Hong Kong would meet the first criterion but not the second.

CHAPTER 5

1. Project Yi Jin is a second chance year-long programme for those unable to pass HKCEE with five subjects including English and Chinese, the requirement for progression to most post-secondary study. In short, a qualification similar to high school equivalence in USA or access programme for higher education in UK.

CHAPTER 8

1. Since the early 1960s, the government has bought places from private secondary schools under the Bought Place Scheme (BPS) to make up for the shortfall in government and aided school places.
2. For example, HKCEE results in 2000 revealed 40 percent of students failed English, 41 percent failed Chinese Language and 37 percent failed Putonghua. Wealthy parents often send their children to international schools or overseas for an

education. Employers complain that job application letters are riddled with grammatical errors. Secondary school principals worry that if the situation continues, the English of Shanghai's secondary school graduates will be better than Hong Kong's.

3. For example, in recent years, resources allocated to education have continued to rise significantly despite overall budgetary constraints. Approved public recurrent and total spending on education in the 2000–2001 financial year amounted to HK\$45.2 billion and HK\$54.4 billion respectively, representing 23.2 percent of the government's total recurrent expenditure and 22.3 percent of the total public expenditure. Tertiary education accounted for about one-third of the education budget. Total spending on education represented 4.25 percent of Gross Domestic Product (Hong Kong Government, 2001).
4. The EC is responsible for advising the government on overall educational objectives, policies, and priorities for implementation. It also co-ordinates the work of all other education-related advisory bodies on the planning and development of education at all levels. Its membership includes key government officials, education professionals from the tertiary, secondary, primary and early childhood sectors, and members of other sectors of the community.
5. That is, a model of contingency in the aspects of environment, task, size, uncertainty, and technology. It is service-producing rather than goods-producing; a school composes relative autonomous sub-units (fragmentation and disconnectedness); attachments between elements and events being circumscribed, infrequent, weak, unimportant, and/or slow to respond; fluid participation and members wander in and out; decisions often unplanned and left to discretion; goals/intentions, actions and events are always ambiguous and indeterminate.
6. The BoE (1920–2002) was a statutory body advising the Education Department on school education, with particular emphasis on how to ensure the smooth implementation of education policies and initiatives for pre-school and school education, including special education. The BoE comprised members with different expertise and experiences in pre-school education, special schools, school administration, teaching, teacher education, tertiary education, business, and other professions.
7. From the outset, the EAIS focused its work on aims 6 to 15 regarding the education process and the desired outcomes, and encouraged schools to take reference from the statement and develop their own school-based educational aims suited to schools' needs and circumstances. To enable schools to monitor their own performance, the aims are converted into concrete and measurable terms through the development of various indicators for schools such as the Working Folio on Implementation of Educational Aims; the School Aims Implementation Folio (SAIF) Package; the Implementation of Educational Aims Package (IEAP); the Student Health Evaluation, Record and Analysis (SHERA) Package; and the School Aims Survey Analysis Package (SASAP). Furthermore, during the 1994–1997 school years, the EAIS introduced a pilot project to help schools develop procedures to monitor and evaluate their implementation of educational aims. These documents and packages included a framework, a set and matrix of indicators, planning *proforma*, and evaluation sheets. The set and matrix of indicators covered performance indicators for both the formal and informal school curricula activities relating to their educational aims. The sample planning *proforma* was designed to

- assist schools in their preliminary planning and monitoring of the planned activities. The evaluation sheets were designed for schools to evaluate their own performance in the implementation of the educational aims, facilitating their monitoring and planning of activities. The Working Folio provided guidelines for schools to implement their educational aims. Packages on specific aims served to enable schools to undertake more in-depth monitoring and evaluation of their own performance in specific areas such as students' self-esteem and improvement in academic performance, students' health, and physical well-being. To help schools collect and act on feedback from parents and students in planning and implementing their school activities, the SASAP included separate questionnaires for parents and students, mainly examining their awareness of individual schools' educational aims and efforts in implementing these aims; the recommended areas for improvement; and the various approaches to obtain feedback relating to awareness, educational aims, and effort in implementing these aims. Also, to tie in with the Report No. 7's aspirations for quality in school education, the EAIS further strengthened its publicity to increase public awareness of educational aims.
8. Within this framework, the provision aspect is concerned with the financial, manpower, and other types of resources put into the education system. Its indicators provide information on provision of school places at various stages, adult education services, teachers and teacher training, and education expenditure. The process aspect reflects the actual functioning or operation of the education system. It includes curriculum aspects, guidance and support services, school improvement measures, pupils' associations, and parental participation. The performance aspect is concerned with the outcome of the education system. It includes academic, sports, cultural, aesthetic, and behavioral aspects. With the data collected and publicized, the report provides an overall review of the performance of the local education system.
 9. In 1999, an advisory committee on SBM was set up to develop a framework of governance for SBM to enhance the transparency and accountability of schools and to provide for a system of checks and balances as more funding and operational responsibilities are devolved to them. Apart from giving schools more decision-making power and more flexibility in the use of resources, the government provides training to support school supervisors, managers, principals and teachers in implementing SBM. To increase the transparency of SMCs, the ED also conducted an exercise to update the information of school managers in the 1999–2000 school year. Subject to their individual consent, information such as name and occupation of the managers is disclosed to the public. To enhance parents' access to information, schools provide detailed documents relevant to day-to-day operations (e.g. school profile, annual school plan, and annual report).
 10. The EC recommended in its Report No. 5 that a Committee on Home-School Co-operation be set up to promote home-school co-operation by conducting surveys, allocating project grants to schools, developing training materials, publicizing better home-school relations, and encouraging the establishment of parent-teacher associations (PTAs). The committee was set up in February 1993 with the aim of improving communication between schools and parents. Its members include educators, parents and officials. Activities organized in 1999 included a seminar on parent education, various promotion activities and training programmes for PTAs as well as a campaign calling upon parents to show appreciation for teachers' work.

11. Key proposals in the consultation exercise are: each SMC will be registered as an incorporated body under the Education Ordinance. Each SMC will comprise up to 60 percent of the total membership nominated by the school sponsoring body made up of the principal, two or more teacher managers to be elected by the teaching staff, two or more parent managers to be elected by the PTA; one or more alumni managers to be elected by the alumni association, and at least one independent manager to be nominated by the SMC from among committed community members and relevant professionals. Each SMC needs to draft its own constitution, stipulating the composition and responsibilities of the SMC and the ways in which the school is managed. Managers may serve only on five school boards at a time; the names of school managers, their tenure and the sector they represent was to be public knowledge. School managers are required to declare any personal interest that may be in conflict with the interests of the school, and are eligible for office between the ages of 21 and 70 ("Transparency urged in the reform of schools," *Hong Kong Standard* 29 February 2000).
12. For example, there were four student-nurturing projects jointly organized by the schools as well as the business and social service sectors in 2001. The four projects placed much emphasis on learning through participation and experience through an interactive and inspiring approach. The projects provided several hundred secondary school students with opportunities to gain further learning experiences outside school. The purpose of the programme was to help the participants to widen their perspective, understand the community, enrich their knowledge and improve their communication and language skills of both Chinese and English. By establishing the partnership, the organizations and schools concerned were able to make use of various resources and means to provide students with multifarious learning activities and experiences in promoting the life-wide learning and whole-person development as advocated in the education reform.
13. The issues are much more complex than commonly expected. In the first place, SBM is an empirically elusive notion and there are different organizational forms (Malen *et al.*, 1990). Second, the causal linkages of the effects of school-based management are still to be verified and the empirical evidence on the positive impact of SBM is thin and mixed (Murphy and Beck, 1995). Instead, SBM often operates as a political response to environmental pressures and a symbolic response to crises of confidence. Since even SBM could take different organizational forms, the central issue, perhaps, in launching an initiative like this, was to delineate the precise and proper balance between different parties and stakeholders, be they bureaucrats, school administrators, teachers or parents (Smyth, 1993). The strategies of SBM as officially advocated are based on a particular model of organization or administration, which assumes that decision-making is rational, and can be carried out through decentralization. The dominant model is insensitive to human relations and the fulfillment of human needs, power and politics, as important attributes or purposes of an organization.
14. As a scientific approach to management originated in the US in the 1890s, with F. W. Taylor as its main proponent, Taylorism refers to a set of principles governing the design of work which entails the separation of conception from execution; fragmentation of work into simple, routine operations; and close managerial control of work.

CHAPTER 10

1. The general commitment to “encourage” mother-tongue education was, in turn, a response to the *Llewellyn Report* of 1982 which, among other things, criticized the widespread counter-productive practice of making children learn in an alien tongue, English.
2. One of my informants, Principal D., an experienced teacher of English, estimated that only about 30 of the 114 schools were able to maintain monolingual teaching in English without great difficulty.
3. The official explanation for this move was that, as from the fall of 2001, allocation to secondary schools would be based on three “bands” instead of five, and so there would be a much greater range of ability among those admitted to the “best” schools. Hence the need for supplementary teaching in Chinese in these schools.
4. It was reported that in an Education Department survey, about 200 CMI schools decided to switch to EMI teaching when their first batch of CMI students proceeded to Forms 4 and 5, for all or some subjects. This amounts to about two-thirds of the total number of CMI schools. See *Apple Daily* (2001).
5. This was a reversal of earlier policy. Following the *Education Commission Report No. 1*, schools were asked to adopt Chinese as medium of instruction. In April 1986, an Education Department circular was issued to schools, recommending them to arrange different groupings of language medium by levels, by subjects and streams (see Education Department 1994: 1).
6. These include: (1) *Education Commission Report No. 4* (Education Commission 1990); (2) *Report of the Working Group on Language Proficiency* (Education Commission 1994); (3) *Education Commission Report No. 6* (Education Commission 1995); and (4) *Medium of Instruction Guidance for Secondary Schools* (Education Department 1997).
7. The role of research in policy is often clearly spelt out in research texts. For example, “In 1981, the government accepted a multi-million dollar package aimed at improving the standard of English and Chinese in schools. One part of this package was the establishment of a research programme to examine problems relating to medium of instruction and to provide a basis for the formulation of future policy directions” (Johnson *et al* 1985: 1).
8. “The end result of the endeavours both of the staff at the ILE and the teachers who use the Centre’s facilities,” according to David Gledhill, chairman of the Swire Group in Hong Kong, who opened the centre, “should be a workforce which is better able to converse and work in the international language of business English” (LCB3: 2).
9. “Hong Kong — International City,” a speech given by Brian H. Renwick, chairperson of the Hong Kong Language Campaign, to the American Chamber of Commerce, 8 October 1993, reported in LCB7: 2–3.
10. The Education Department commissioned a study to compare the teaching of eight Chinese-medium schools with eight English-medium schools. It revealed that “teaching in experimental schools [Chinese-medium schools] was more dynamic and active. Teachers adopted more interactive approach and students actively participated in their learning process. ... Also observed through videotaping of classroom teaching, teachers adopted more lively presentation style in their teaching. Because there was no language barrier in the teaching and learning

process, more topics were covered and the subject matter was discussed in detail and in depth” (see Education Department 1994: 55–59).

11. Presentation of ongoing research on CMI schools by Amy B. M. Tsui in the Annual Education Seminar, Professional Teachers’ Union of Hong Kong, 12 June 1999.
12. Traditional Chinese middle schools were typically set up in the pre-war years, adopting Chinese as the medium of instruction, and following the American 6–3–3 system (six years of primary schooling, followed by three years of junior and then three years of senior secondary schooling) adopted on the mainland. In 1961, the three years of senior secondary schooling were truncated, as the junior and senior secondary stages were combined into five years plus one matriculation year by government decree. This was to bring them in line with the Anglo-Chinese system, which was marked by the use of English as the medium of instruction except for the subjects Chinese and Chinese history, and five years of secondary instruction followed by two years of matriculation before university entry. Despite the growing unpopularity of CMI education, some such Chinese middle schools still maintained their CMI instruction. After 1997, they were joined by many other Anglo-Chinese schools forced to switch to CMI teaching.
13. “Mother tongue teaching a dead-end road: three big heads of the EC lashed out at present policy,” *Apple Daily* (2000). The “three big heads” referred to are Anthony K. C. Leung, banker appointed Chairperson of the Education Commission, Cheng Kai-ming, professor of education at the University of Hong Kong, and Tai Hay-lap, headmaster of a local secondary school. All three had sustained a high media exposure throughout the education reforms.

CHAPTER 12

1. For a comprehensive account of the language scene in Hong Kong, see chapter 5 “The language malaise” in Lau (1997b). See also Chan, A., Hoare, P., and Johnson, K., *English Medium Instruction in Hong Kong Schools: An Evaluation of Policy Implementation*.
2. In Hong Kong, using Chinese as the teaching medium means, in practice, using textbooks written in standard modern Chinese and teachers lecturing in Cantonese, the dominant dialect spoken in southern China and most Hong Kong homes. It has to be noted that the oral equivalent of standard modern Chinese is Putonghua (or Mandarin), which differs greatly from Cantonese phonetically. Strictly speaking, Cantonese is not a script-based language and its written form is not widely accepted outside southern China. For this reason, although mother-tongue education means using Cantonese as the classroom language, the policy is formally referred to as teaching and learning in Chinese.
3. One hundred schools were initially allowed to teach in English, but 14 more were permitted to do so on appeal.
4. For a comprehensive account of the row, see Lau (1997a).
5. In 2001, a DSS school could receive an annual government subsidy of HK\$29 500 per student if its tuition fees did not exceed HK\$68 864 per annum. According to the 2001 census, the median annual domestic household income was HK\$224 460.
6. For an overview of top public schools’ moves to join the DSS, see Cheung, G., “Direct subsidies put elite schools in the driving seat,” *South China Morning Post*, 22 September 2001.

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