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Controversies in Medium of Instruction Reform

The Experience of Hong Kong

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Foreword

In post-colonial situations, decisions about the appropriate language(s) of instruction to adopt for the children of the schools in a society have often been fraught. There are a number of arguments that can be raised in favour of complete rejection of the colonialist's language and in favour of promoting the mother-tongue(s) of the people involved. But there are also arguments in favour of retaining some educational programs in the colonialists' language. Especially is this so when the language is a major international language such as English. Arguments of this sort were important in Hong Kong even before the 1997 handover, though since then, they have become even more important and often quite vexed. The Hong Kong educational authorities and the schools sought to come to terms with the best kinds of policies to implement, not always with the happiest results. In many cases, attempts to provide educational programs in a mother-tongue other than English were perceived as offering a "second-class" experience; too often, English remained the preferred language because of its status and significance in the worlds of commerce, trade and business more generally.

This book offers a very thoughtful and comprehensive review of recent Hong Kong educational history, with important lessons for other societies still seeking to establish the best educational programs for their people, with particular reference to the language of instruction that is adopted. I congratulate the authors who have written a very illuminating volume.

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Contents

1	Introduction	1
1.1	Introduction to the Book and the Chapter	1
1.2	Medium of Instruction Policies in Other Former British Colonies	3
1.2.1	Malaysia	3
1.2.2	Singapore	5
1.2.3	Conclusion of the Section	8
1.3	Status of Chinese and English in the Hong Kong Context	8
1.3.1	Sociopolitical Context	9
1.3.2	Socio-economic Context	14
1.3.3	Sociocultural Context	15
1.4	Theoretical Concepts of Bilingual Education	20
1.4.1	Zone of Proximal Development (ZPD)	22
1.4.2	Benefit of Bilingual Education for Cognitive Growth	23
1.4.3	Threshold Hypothesis	24
1.4.4	BICS and CALP	25
1.4.5	Length of Time for Acquisition of BICS and CALP	26
1.4.6	SUP, CUP and Interdependence Hypothesis	27
1.4.7	Additive and Subtractive Bilingualism	28
1.4.8	Replacive and Preparatory Bilingualism	30
1.4.9	Learner's Motivation, Identity and Inputs	30
1.4.10	Language Acquisition Versus Language Learning	31
1.5	Chapter Conclusion and Structure of the Rest of the Book	34
	References	37
2	Languages Used in Hong Kong	41
2.1	Introduction	41
2.2	English Language Usage in Hong Kong	41
2.3	Varieties of Chinese Language Used in Hong Kong	45
2.4	Code-Mixing	46

2.4.1	Code-Mixing of Chinese and English	47
2.4.2	Code-Mixing of Modern Standard Chinese and Cantonese	48
2.5	Standardization Challenges in Chinese Language Education and Training	48
2.5.1	Terminologies	48
2.5.2	Character Systems	49
2.5.3	Transliterations After 1997	50
2.5.4	Standardization of Chinese Input Methods	50
2.5.5	Issues of Genre in Practical Chinese Writing	50
2.6	Conclusion	51
	References	52
3	Medium of Instruction Policy: Historical Background and the 1998 Reform	55
3.1	Introduction	55
3.2	The Changing Face of the Language Policy in Hong Kong	55
3.2.1	The Eighteenth Century	55
3.2.2	The 1930 to 1960s	56
3.2.3	The 1970s	56
3.2.4	The 1980s	57
3.2.5	The 1990s	58
3.2.6	The 2000s	59
3.2.7	Summary	62
3.3	The Calls for Mother-Tongue Education at Different Times	63
3.3.1	Hong Kong Pre-1949	63
3.3.2	Post-second World War	64
3.3.3	The 1965 White Paper	65
3.3.4	The 1973 Green Paper	66
3.3.5	The 1974 White Paper	67
3.3.6	The 1980s to the 1997 Handover	68
3.3.7	The 1982 Llewellyn Report	69
3.3.8	The Education Commission Reports (ECRs)	69
3.4	Try to Strike a New Balance: Stepping into Being an SAR of China	73
3.4.1	The 1998 Medium of Instruction Reform	73
3.4.2	The Resistance, Achievements and Winding-Down of the Reform	76
3.5	Conclusion	76
	References	78
4	Transitional Issues in the Implementation of New MOI Policy	81
4.1	Introduction	81
4.2	Teachers' Perception of Mother-Tongue Education	83
4.2.1	The Effects of Mother-Tongue Teaching	83
4.2.2	Parental Opposition	86

4.2.3	Allocation of Extra Resources on English Learning	87
4.2.4	MOI Dilemma at Senior Secondary Levels of CMI Schools	88
4.2.5	The Language Transition Between Junior and Senior Secondary Levels	90
4.2.6	Harnessing the Advantages of Mother-Tongue Education	92
4.2.7	The English Language Proficiency of Students	93
4.3	Difficulties Encountered in Implementing Mother-Tongue Education	94
4.3.1	Language Use	94
4.3.2	Teacher Training	97
4.3.3	Resources Support	98
4.3.4	Teaching Syllabi and Assessment Mechanisms	99
4.4	The CMI Schools' Decision on MOI at Senior Secondary Levels	99
4.4.1	Actual MOI Used at Secondary 4 Level in year 2001–02	101
4.4.2	Planning the MOI of Secondary 6 in Year 2003–04	102
4.4.3	Special Feature—Teaching One Subjects with Two MOI	102
4.4.4	Problems Faced by Teachers at the Senior Secondary Level	103
4.4.5	Factors Affecting the Choice of MOI at Senior Secondary Levels	107
4.4.6	Decision Process on the school's Senior Secondary MOI Policy	107
4.5	Conclusions	109
	References	112
5	Collaborative Support and Facilitation of Change in the Reform	115
5.1	Introduction	115
5.2	Five Missions of the Centre	116
5.3	Mission 1: Boosting Teachers' Confidence	118
5.3.1	Overcoming the Problem of Using Chinese on Computers	119
5.3.2	Supporting Teachers to Develop Their Command of Chinese	119
5.3.3	Additional Learning Resources	123
5.4	Mission 2: Advancement in Pedagogy	125
5.4.1	Promoting Good Teaching and Learning Practices in CMI Schools	125

5.4.2	Identifying a Core Theory for Learning in the Centre	126
5.4.3	Collaborative Innovative Learning and Assessment Designs	128
5.5	Advancing Project Learning and Assessment	131
5.6	Study on Classroom Discourse and Space of Learning	132
5.7	Mission 3: Advancing Subject-Specific Genre Awareness	134
5.8	Mission 4: Broadening Horizons	137
5.9	Mission 5: Formation of Collaborative Community	139
5.10	Working Principles	141
5.10.1	Face-To-Face Discussion and Computer Network Sharing	141
5.10.2	Service and Research	143
5.11	Conclusion	144
5.11.1	What a Large-Scale Education Reform Would Demand	144
5.11.2	Why University Centre Could Be Useful Mechanism to Support Reform	144
5.11.3	Government Support for Such a Centre Could not Be Long-Term	145
	References	146
6	Interlanguage and Subject-Specific Genres	149
6.1	Introduction	149
6.2	Language Interference	150
6.2.1	Interlanguage	150
6.2.2	Second Language (English) Interference	157
6.3	Subject-Specific Genre	164
6.3.1	Research into Subject-Specific Genres	166
6.3.2	Genre Studies in Hong Kong	167
6.4	Conclusion	179
	References	181
7	Multiple-Case Study at the School Level	183
7.1	Introduction	183
7.2	A Multiple-Case Study of the Experiences of Chinese-Medium Schools	184
7.3	Details of the Sample Schools	184
7.4	Research Findings	185
7.4.1	Reasons of Using CMI Before the Time of the 1998 MOI Reform	185
7.4.2	Strategies Used to Facilitate the Change of Instructional Medium	188
7.4.3	Modes of MOI Used in Senior Secondary Levels	191
7.4.4	Effects of CMI on English Language Learning	194
7.4.5	Measures to Enhance English Language Learning	195

7.4.6	Difficulties Encountered During the Transition	196
7.4.7	Benefits of Using the Mother-Tongue as the MOI	202
7.5	Conclusion	207
	References	210
8	Evidence of Success of the MOI Reform	213
8.1	Introduction	213
8.2	The CMI Centre 2005 Survey	214
8.2.1	Purpose of the Study	214
8.2.2	Methodology	214
8.2.3	Major Findings Related to the MOI Policy	216
8.3	Analyses of Public Examinations Results	224
8.3.1	Subject Learning and Eligibility for Educational Advancement	225
8.3.2	English Language Performance	229
8.4	Longitudinal Study Comparing CMI and EMI School Students	234
8.5	Conclusion	236
8.5.1	Some Highlights About the Findings	236
8.5.2	Seeing the Impact in Context	238
8.5.3	Additional Efforts and Measures at the School Level	239
8.5.4	The Need to Explore Bilingual Education	240
	References	241
9	Review and “Fine-Tuning” of the MOI Reform Policy	243
9.1	Introduction	243
9.2	Persistent Criticism Against the 1998 MOI Reform	244
9.3	The 2005 EC’s Official Review of the MOI Reform	245
9.3.1	Uphold Mother-Tongue Teaching	247
9.3.2	Enhancing English Proficiency Concurrently	247
9.4	Further Intensified Worry About English Standards	249
9.4.1	HKCEE English Language Results	249
9.4.2	HKALE English Language Results	250
9.4.3	Tsang’s Study About University Admission	251
9.5	The “Fine-Tuning” of MOI Policy	251
9.5.1	The Objective of the “Fine-Tuning”	252
9.5.2	Framework of the “Fine-Tuning”	254
9.5.3	Unpublicized Reason of “Fine-Tuning”: Drop in Student Population	256
9.6	Educators Expressing Resentment Against the Fine-Tuning	256
9.7	Educators Affirming the MOI “Fine-Tuning” as Improvement	261
9.8	Changes at the School Level After the Implementation of “Fine-Tuning”	263

9.8.1	MOI Adopted by Schools at the Junior Secondary Level	263
9.8.2	Class-Based MOI Division	264
9.8.3	Subject-Based MOI Division and Other Differentiated Arrangements	265
9.8.4	Impact on Learning When MOI Changed from CMI to EMI	266
9.8.5	Students' Attitude	268
9.9	Subsequent 6-Year Cycles of "Fine-Tuning" Implementation (2010–2022)	269
9.10	Advocacy for CLIL Teacher Development and Translanguaging in EMI Teaching	271
9.11	Conclusion	274
	References	275
10	Conclusion	279
10.1	Introduction	279
10.2	The Achievements and Limitations of the 1998 MOI Reform	281
10.2.1	Remarkable Achievements in Advancing Teaching and Learning	281
10.2.2	Major Challenges and Efforts Behind Such Achievements	281
10.2.3	Had the MOI Reform Pulled the English Standards of Students Down?	284
10.2.4	CMI/EMI School Bifurcation—A Major Drawback	287
10.2.5	Section Conclusion	289
10.3	The Achievements and Limitations of the 2010 "Fine-Tuning"	290
10.4	Rising Demand on Both English and Chinese Languages Since 1997	293
10.4.1	The Rising Value of English and the Persistent Fear of Losing It	293
10.4.2	The Rising Importance of Chinese	296
10.5	Diversity, Motivation and Self-determination of Students	297
10.6	Inclusive Versus Exclusive Mind-set in Seeing Relation Between Languages	299
10.7	Making "Additive and Inclusive Bilingualism" an Empowering Goal for Hong Kong	303
10.7.1	Present Teaching and Public Examinations in Chinese and English	303
10.7.2	"Two-Solitude" Bilingualism Versus Additive and Inclusive Bilingualism	304

10.7.3	Language Purism Versus Additive and Inclusive Bilingualism	306
10.7.4	Transitional Bilingualism Versus Additive and Inclusive Bilingualism	307
10.8	Researching Bilingual CLIL Pedagogy in the Hong Kong Specific Context	308
10.9	More Recommendations on Future MOI Policy Development	313
10.9.1	About the Relative Importance of Languages	313
10.9.2	About Language Bifurcation	314
10.9.3	About Bilingual Education Models	315
10.9.4	About Professional Autonomy	316
10.10	Conclusion	318
	References	321

Chapter 1

Introduction



1.1 Introduction to the Book and the Chapter

The education system of a place affects the future of its society. In a place where the everyday language used in society is exactly the same as that is used by teachers in the classroom, there is usually no dilemma about its medium of instruction (MOI). However, problems may arise if the language the child speaks at home differs from the one that the teacher is using in lessons, and this is very often the case in Hong Kong.

Hong Kong had been a British colony from 1842 until its return to China in 1997 as a special administration region (SAR). For over hundred years, all legislature was appointed by British government and civil service ordinances were in English, with Chinese translations gradually being added over the years for reference. In the early years, the educational system that the colonial government introduced for expatriates was based on the system applying in England at that time. Naturally, English was used as MOI in classrooms. Gradually, education provision expanded and elite Chinese government helpers in Hong Kong also sent their children to these schools.

Following the Second World War and the revolution in China, educational provision had to be greatly expanded to accommodate the huge influx of refugees from Southern China. Yet, English remained the sole official language of Hong Kong until 1974, when Chinese was granted an equal status to that of English as an official language of Hong Kong, and questions soon began to be raised about whether English or Chinese should be used as the MOI in classrooms. Although there were various moves to raise the profile of Chinese language, the majority of secondary schools still used English as the MOI at the time of the 1997 handover.

Very soon after the handover, the new SAR government announced that, from September 1998, Chinese would be the default MOI for all junior secondary schools. Any schools wishing to use English as the MOI had to apply to the education authority for approval. This did not bring the language debate to an end. On the contrary, there was a serious split of view to the new policy, with quite a strong voice of uncertainty and opposition among schools and local parents. Notwithstanding the

difference in views, the MOI reform was implemented, and it can now be regarded as an experimentation from which important lessons can be drawn for the future.

This book is going to provide a detailed examination of what have happened with the MOI policy of Hong Kong SAR government, from its mother-tongue education reform since 1998, to the “fine-tuning” of the reform since 2010. To facilitate understanding of the matter, the book will also provide a historical account about relevant political, economic, cultural and linguistic contexts of Hong Kong and its education development since early colonial times and examine how such factors have changed or remained similar in affecting the MOI policy of Hong Kong in its new post-colonial era.

The authors of the book have previously published quite a lot on the mother-tongue education reform, especially during the early part of the reform in 1998–2005. In contrast, this book, is a retrospective re-examination of the reform and its subsequent “fine-tuning” from 1998 to 2020 and in the context of a much longer time span since early colonial times to date. Hence, this book is taking a much broader view. In this re-examination, more attention is put on the language diversity and hybridization reality in the city and the different views in society for and against the reform. While the earlier publications of the authors were more on the needs, methods and benefits of mother-tongue education, this book much more centred on the needs and benefits of bilingual education, different possible models of bilingual education and what teacher and curriculum development would be required for additive bilingual education. This book really represents a more prolonged reflection of the authors. Besides, it is hoped that this book in English will be able to reach a much wider audience in the international academia.

The book will review the special efforts made by educators in adapting to the 1998 MOI reform towards mother-tongue education as well as the “fine-tuning” of the reform at multiple levels, including special additional measures taken by them at the school and classroom levels beyond what was stated in the official policy of the reform and “fine-tuning” to cater for the bilingual learning needs of their students, as well as the collaborative and interdisciplinary research and development work among school teachers and university academics in advancing the integration between language learning and subject learning. The practices of educators at different points of time are captured and reflected upon in connection with theories of second language acquisition and bilingual/plurilingual education.

The review largely confirms the important value of mother-tongue (L1) in education and reveals that, if it can be coupled with the advancement in pedagogic practices, there can be remarkable change in the quality of learning outcomes. It can also be put in a slightly different way: while MOI policy innovation is important, it has to be coupled with teacher support and development of effective educational practices for its success, and the review can throw light on certain specific developments which have been instrumental.

The review also reveals that L1 and L2 language bifurcation in the reform had been fundamentally problematic and ultimately led to negative labelling and backfire. Unfortunately, this issue has only been partially addressed in the subsequent “fine-tuning”. As a conclusion of the book, the authors suggest that, instead of having

separate L1 and L2 streams in schools, additive bilingual education and the inclusive relation among the languages should be promoted. Instead of regarding the use of L1 and L2 in the same classroom as disastrous, which has been a long-held view by the educational authority of Hong Kong (both before and after the handover of sovereignty), effective bilingual content–language-integrated learning (CLIL) principles, pedagogies and differentiated models should be developed and promoted for the specific social and linguistic context of Hong Kong to address the diverse learning needs of students and the demands of society. Collaborative research and teacher support programs can be done, possibly based on the bilingual practices that have been emerging and identified in this review, in building up a more solid vision for “additive and inclusive bilingualism” for Hong Kong.

In the rest of this chapter, the authors wish to do three things: (i) to describe the socio-historical context of Hong Kong in relation to the statuses of Chinese and English in the place, with reference to the post-colonial experiences in some other countries; (ii) to explain some theoretical concepts in the field of bilingual education and second language acquisition, which will be used as lenses in re-examining the MOI debate in the post-colonial time of Hong Kong and (iii) to provide a simple description about the structure of the whole book.

1.2 Medium of Instruction Policies in Other Former British Colonies

To understand the importance as well as complexity in MOI policy development, it may be illuminating to cite the experiences of former British colonies in Asia, such as Malaysia and Singapore before we discuss the case of Hong Kong. These two countries also have significant parts of their population being Chinese by ethnicity, but a major difference from Hong Kong is that they are clearly more multi-ethnic. When these two countries achieved independence, it was vital for them to maintain social and political stability. But this can be a complicated objective given that the composition of their population was multiracial and multilingual. Finding a viable lingua franca for interethnic communication was crucial for balancing the interests of all so that every ethnic group felt socially accepted (Tsui et al., 1999).

1.2.1 Malaysia

Before Malaysia gained independence, English was the language of the privileged and the MOI in elite schools, with Malay, Chinese and Tamil used in vernacular schools. After its independence in 1957, Malay was made the national language and the MOI in schools as a strategy for uniting the nation and its people (Omar, 1999). English was allowed for official purposes for ten years (Ke, 1991). Driven by ethnic riots in 1969,

Malay increasingly replaced English as the MOI from primary school to university, leading to a dramatic increase in Malay usage within the professions (Crouch, 1996). The national language policy of promoting Malay usage in schools was a great success in the first three decades after the national independence. However, there has been a general decline in English standards after the adoption of Malay as the language of schooling, and the workforce became less competitive in the global business, compared with overseas counterparts (Omar, 1999). Hoping to become an advanced and industrialized country by 2020, the Malaysian government realized that it could not compete internationally with its neighbours if its traders lacked competency in English (Lee, 1995). With the development of globalization, Malaysia underwent two main education reforms on language policy to achieve the goal of bilingualism in the recent 20 years.

1.2.1.1 The Teaching and Learning of Science and Mathematics in English (2002)

In 2002, the then Prime Minister Mahathir Mohamad announced, that from 2003 onwards with a focus on PPSMI (Pengajaran dan Pembelajaran Sains dan Matematik Dalam Bahasa Inggeris), a policy which served as a first step towards bilingual education. English would be made the MOI in Mathematics and Science. The language policy, as soon as it was announced, has generated massive reactions from scholars, politicians and the general public, who viewed it as a threat to their cultural identity and the perceived advantage resulted from learning Mathematics and Science through L1 as compared to L2. A compromise was eventually reached with the decision to allow vernacular schools to officially adopt a bilingual approach—using both the vernacular and English—to the teaching of Mathematics and Science. Despite teacher training support was then provided by the government and institutions, research found that as many as 93% of the trainee practitioners did not think they could teach biligually, nor were they motivated to pursue success in teaching in English (Chan & Tan, 2006). The merit of this bilingual language policy is thus still under debate.

1.2.1.2 Upholding the Malay Language and Strengthening the Command of English (2012)

The Ministry of Education of Malaysia announced another education reform named MBMMBI which replaced PPSMI. MBMMBI (Memartabatkan Bahasa Malaysia dan Memperkukuh Bahasa Inggeris) stands for “upholding the Malay language and strengthening the English language” in English. The return of Malay as the medium of instruction can be justified from students’ examination results. Students learning in Malay performed better than those who studied in English (Ahmad et al., 2012). The goal of this 2012 policy is to reinforce the status of Malay language as the national language of Malaysia, as well as to guarantee students’ proficiency of English, as

English is a medium of international communication, eventually achieving bilingualism. The Malaysian Education Plan identified “bilingual proficiency” as one of the six important keys for students to enhance their competitiveness in the world (Malaysia Education Blueprint, 2012). Even though survey showed that students preferred the new MBMMBI policy than learning Science and Mathematics in English (Ahmad et al., 2012), the implementation received a lot of criticisms from parents, complaining the confusion caused by frequent change of education policy (Tharmalingam, 2013).

Reflecting on the Malaysian experience, it seems that the government has mainly relied on policy and administrative measures to alter the language standards of citizens. Comparatively, less emphasis has been put on teacher support and the research and development of bilingual pedagogy. When attempting to promote the usage of Malay, the language was officially made the MOI of schools. And then when the government witnessed a decline in English standard, it immediately correlated the decline with the fact that Malaysian students did not learn English by immersion and consequently adopted a bilingual approach to teach certain subjects using English as medium of instruction (EMI). But even if the government has the right foresight, and its policies or administrative measures are pointing to the right direction for educational development, the policies must be coupled with effective pedagogical practices in order to bring real improvements in teaching and learning. The experience of Malaysia shows that merely switching the MOI of schools may not directly lead to the improvement in the target language (whether it was Malay or English). The attitude, training and effective teaching strategies of frontline teachers and the support they receive are also critical to the success of any language education policy. Furthermore, language preferences are affected by evolving social, cultural, political and economic factors, which are often beyond what the government can control. In short, it requires real practice, outcome and knowledge/discourse building to cultivate a more holistic and inclusive view of the population towards sustainable development of multilingual capability of the nation.

1.2.2 Singapore

Being a multi-ethnic society with a Chinese majority population (77%), Singapore adopted “a policy of equal treatment” as a means to ensure that no ethnic group would be disadvantaged (Government of Singapore, 1956; Pakir, 2004). Although Malay was designated the premier national language (Tyack, 1991), English, Chinese, Malay and Tamil were all afforded official language status of the nation. English, an ethnically neutral language, was used as a vehicle for solving Singapore’s ethnic problems and held up as the dominant “working language”. In 1987, English eventually became the main MOI for all state schools, and students’ mother-tongues were to be taken as a subject of second school language. As a result of the implementation of this language policy, Singaporeans also increasingly use English even as their predominant household language. The promotion of English obviously has helped

expediting Singapore's development and integration into the global economy (Pakir, 2004).

Nevertheless, government officials began to express concerns about the increase of individualism, consumerism and liberalism among the Singaporeans. And the use of English as the dominant language of the nation was taken to be part of the reason, because it is difficult to separate culture from language. As one's native culture is embodied by one's mother-tongue or heritage language, some leaders in the government argued that learning English in the expense of the mother-tongue has led to deculturization of people. The Western values associated with English have also been accused of debasing the younger Singaporeans (Bokhorst-Heng, 1999). In response of these concerns, Singapore government went through four reforms of its mother-tongue education system from 1992 to 2010 in order to improve the education system and better equip students with both English and their mother-tongues. Following are particular examples in relation to the learning of Chinese.

1.2.2.1 The 1992 Review (Ministry of Education, Singapore, 1992)

The reform was conducted under the lead of Deputy Prime Minister at the time, Ong Teng Cheong. The report regarded bilingualism as the foundation of Singapore education system. Ten main suggestions were made to facilitate and promote Chinese language education, such as increasing instruction time at primary schools and loosening the restriction of higher Chinese and Chinese literature. Another amendment was renaming some curriculums. Chinese as second language and first language was renamed as Chinese and higher Chinese, respectively. Furthermore, the passing on of Chinese culture was highlighted in the report as being neglected in Chinese education for years.

1.2.2.2 The 1999 Review (Qiu, 2011)

After a throughout analysis, Deputy Prime Minister at the time Lee Hsien Loong decided to carry out another reform, in response to the fact that the number of Chinese-ethnic Primary 1 students speaking English at home as the usual language had been increasing rapidly. The goal of this reform was to set an attainable target for students' learning of Chinese. Some of the arrangement included loosening the restriction of advanced Chinese in order to encourage more students taking this curriculum. At the same time, a new Chinese B curriculum with more manageable content was established for students with lower ability.

1.2.2.3 The 2004 Review (Chinese Language Curriculum and Pedagogy Review Committee, 2004)

In 2004, Chinese Language Curriculum and Pedagogy Review Committee was formed and led by Wee Heng Tin. The committee reviewed the existing bilingual curriculum model to strengthen mother-tongue education and to accommodate different needs of students. A differentiated curriculum, which taught students with different abilities using instructional materials of different levels of difficulty and teaching strategies, was proposed. Three different levels of curriculum on their mother-tongue were eventually implemented in primary schools—(1) foundation curriculum, (2) normal curriculum and (3) higher curriculum. The reform has enjoyed visible success.

In 2007, the Ministry of Education tried to further strengthen the mother-tongue language curriculum by adopting a more responsive and engaging mother-tongue language curriculum (Ministry of Education, Singapore, 2008).

1.2.2.4 The 2010 Review (Ministry of Education, Singapore, 2011)

Following the last reform, the committee led by Ho Peng once again reviewed the mother-tongue education system but with a new focus—the application of technology. Information technology was incorporated into the model. The assessment of the curriculum was also modified, cancelling the old and unnecessary exams and adding questions of new styles. Overall speaking, this review gave a clearer and more holistic definition on the goal of mother-tongue education—communication to maintain competitiveness, recognition of culture and connection around the world.

The recommendations mentioned above have been carried out starting from 2015 in the primary school mother-tongue language (MTL) curriculum. Acknowledging the fact that English has become the dominant language at many households, the revised MTL curriculum pays more attention on the listening and speaking skills to make sure that students can be fluent with their mother-tongue languages (Ministry of Education, Singapore, 2017). Each of the three MTL curricula (Chinese, Malay and Tamil) also makes explicit the key features of the mother-tongue language to be learnt.

1.2.2.5 Lee Kuan Yew Fund for Bilingualism (2018)

This fund was set up by the late Mr. Lee Kuan Yew in 2011, together with the publication of his work *“My Lifelong Challenge: Singapore’s Bilingual Journey”*. The fund supports programs that promote bilingualism and mother-tongue language cultures in Singapore. In 2017, the fund subsidized different kinds of bilingual activities, such as publication, play, movie and debate competition. Established for 7 years, Lee Kuan Yew fund for bilingualism has already supported 90 programs with more than \$15 million of financial support. The result is a uniquely defined bilingualism (Pakir,

2004). It is worth noting that such “Bilingual Journey” advocated by the Singapore government includes all levels of popular education from kindergarten.

1.2.3 Conclusion of the Section

In short, one can see a strong leadership of Singapore government, first in laying out a clear long-term multilingual language policy for nation building and second in committing to the continuous moderation of such policy and its implementation in view of both the needs of society as a whole and the actual learning situation of students, and in particular the attention to balance the roles of English and mother-tongues. Though important concerns about languages have long existed in Hong Kong and the government of Hong Kong did try to make some drastic change in language policy immediately after 1997, up to the recent date, a clear and comprehensive review on MOI in relation to its own unique political, economic and social situation is yet to be seen.

It is clear from the experiences of both Malaysia and Singapore that each nation has its unique situation and goals, and policy choices may be tempered by its own social, cultural, political and economic factors, made and revised to suit the aspirations of the nation in facing changes. Hence, while acknowledging the value of the experiences of Malaysia and Singapore on language planning in education, Hong Kong would need a model of its own to face its unique situation and to identify its goals. The experience of Malaysia and Singapore also indicates that in order to maintain sustainable internal solidarity and global connection, bilingualism or multilingualism in education is likely something indispensable, and the question is how it is to be defined and to handle in one's own context.

1.3 Status of Chinese and English in the Hong Kong Context

Obviously, Hong Kong is different from Singapore and Malaysia. Hong Kong is not a sovereign state, even though certain degree of freedom has been guaranteed by the promise of “one country, two systems” in the Basic Law of Hong Kong SAR. Maintaining the uniqueness of Hong Kong as an international recognized cosmopolitan can allow it to contribute to the future development of China, different from other major cities in China, such as Shanghai, Beijing and Shenzhen. But it is still a political part of China, and the Hong Kong SAR government has to remain in accord with the general political stance of the nation.

The change in the use and status of Chinese and English in the place over time can be analysed from a number of perspectives. In this analysis, one should also bear

in mind that there are in fact various versions of the Chinese language used in the community that further complicates the issue.

1.3.1 Sociopolitical Context

1.3.1.1 Official Language of the Place: English Versus Chinese

Hong Kong was ceded to Britain as a colony in 1842, and English became the official language of state. A significant objective in the education of the local Chinese from that time onwards was to produce English-speaking Chinese who could serve as brokers between the colonial government and the governed. Knowledge of English also gave the native Hong Kong business population a key advantage in their ability to trade with both East and West and to act as intermediaries between trading establishments around the world. Later, when Chinese language became also an official language in Hong Kong in 1974, the English language continued to enjoy greater esteem. English was the most usual medium of communication in higher levels of the government, and proficiency in English was considered an asset for dealing with official matters, both by government officers and members of the public. Bilingual English and Chinese legislation only happened from early 1990s after the signing of the 1984 Sino-British Joint Declaration about the future return of Hong Kong to China. Hence, for many old laws in Hong Kong now got translated, in matters of ambiguity, the English version is taken as the final arbiter. As the Law Drafting Division from the Department of Justice (1998) pointed out:

In the case of a statute that was initially enacted in English only with its Chinese text subsequently prepared and declared authentic, the English version was the original official text on the sole basis of which the Chinese counterpart was prepared. In ascertaining its legal meaning, the English text should be taken as more accurately reflecting the legislature's intent when the statute was initially passed. In this case, the meaning borne by the English version will therefore take precedence over the Chinese one. (par. 6.3)

The Hong Kong government began to pay more attention to the status of the Chinese language as the 1997 handover drew closer. Laws and many government documents were translated into Chinese in the 1990s and, with effect from August 1995, all civil service grades were required to specify a Chinese language proficiency requirement as a qualification for their appointment (Civil Service Bureau, 2006). To promote the wider use of Chinese within the civil service, the Official Languages Agency (OLA) was set up in 1996. The Civil Service Regulations governing the conduct, terms of appointment and conditions of service of civil servants were translated into Chinese. Guidebooks and reference materials on official Chinese writing and glossaries of terms commonly used in the government have been compiled by the OLA since then. According to the Year Book 2000 (Hong Kong Special Administrative Region Government, 2000), a common Chinese character set for personal computer systems for use in the civil service to facilitate electronic interchange of Chinese document files was developed in April 1998. The OLA has also worked

closely with the Information Technology Services Department in connection with ISO 10646, an international endeavour to standardize the internal codes of Chinese characters (OLA, 2002).

The SAR government has adopted a “biliteracy and trilingualism (BLTL)” policy since 1997 and committed that the civil service will remain fully biliterate (in English and Chinese) and trilingual (Cantonese, English and Putonghua). It seems that Chinese and English will enjoy the same status as official languages, but a difference is hinted subtly in the Basic Law of Hong Kong, which is approved by the Chinese National Congress to define how the “one country, two system” should operate. In Chap. 1, General Principles of the Basic Law, Article 9 says “In addition to the Chinese language, English may also be used as an official language by the executive authorities, legislature and judiciary of the Hong Kong Special Administrative Region.” This should be taken to mean Chinese would be the essential medium and English the additional/optional medium for the official communications of these bodies (Basic Law, Consultative Committee for the Basic Law of the Hong Kong Special Administrative Region of the People’s Republic of China, 1990, article 9). Hence, English people wishing to advance in business or public sector in Hong Kong would need to master some Chinese language (Lord & T’sou, 1985). Furthermore, for effective communication with people of Mainland China, it is also necessary for the people of Hong Kong to acquire proficiency in Putonghua (Ho, 1990).

1.3.1.2 Chinese, Cantonese and Putonghua

Unlike Malaysia, India and Singapore, which are clearly multi-ethnic and hence need to find a lingua franca for interethnic communication and national solidarity, 95% of the Hong Kong population are Chinese, and there is already a lingua franca among them: Cantonese Chinese. One would have thought that this could be used to symbolize unity and identity of most Hong Kong people. However, the thing is not as simple as it appears. As a special administrative region (SAR), Hong Kong has to identify with Mainland China, where the lingua franca is Chinese in simplified characters (written) and Putonghua (spoken), but Chinese people in Hong Kong mostly use traditional Chinese characters. Hence, with the return of sovereignty to China, Hong Kong SAR government declared the “Biliterate and Trilingual” official language policy (BLTL policy), covering Chinese (traditional characters) and English in the written form and Cantonese, English and Putonghua in the spoken form, in which the relative status among the different languages named in the BLTL policy remains nebulous and ambivalent.

To understand the choice of language in Hong Kong, it is also important to look at the similarities and differences between “simplified characters”, “traditional characters”, “Putonghua” and “Cantonese”, and the sociopolitical connotation that could be associated to the differences.

For thousands of years, Chinese people in different localities of the nation have been sharing a common set of traditional characters in writing the Chinese language, but the pronunciation of the characters varies in the different local dialects. In Hong

Kong, “Chinese” often refers to writing using traditional complex characters on the one hand and to Cantonese speech on the other. Although written Chinese often contains local variations, Chinese speakers in Hong Kong usually understand most of the writing variations, including the “simplified characters” used in Mainland China.

“Simplified Chinese characters” were introduced after the Communist Party took the rule of Mainland China after 1949 to encourage literacy. It was meant to be a standardization that systematically simplify of the written forms of Chinese characters, as well as to substantially reduce the total number of standardized Chinese characters. The set of standardized simplified characters have also been modified a number of times by the Chinese government in the Mainland in 1977, 1986 and 2013 after its initial announcement in 1956. According to the Table of General Standard Chinese Characters in 2013, there are altogether 8105 characters (including characters with their forms simplified and those with their form stay same as traditional). While the simplified characters are used in Mainland China, the traditional characters are still used in Taiwan, Macau and Hong Kong. Some simplifications have been criticized to be too severe because of the confusion in meaning and the loss of link to the original meaning encoded into the written form. The reduction of the set of characters also leads to some concern, particularly when some names of people and places will have to be changed, because the traditional characters used for naming them are not in the standard set.

“Putonghua” literally means “common speech” in Chinese. Before the Communist Party took the rule of Mainland China (from 1949) and form the People’s Republic of China, the Nationalist Party government of China called the speech “Guoyu”, literally meaning “national language” in Chinese, to signify its national building purpose (and it was also known as “Mandarin” internationally).

After overthrowing the rule of the Qing Dynasty, the Nationalist Party government created the national language by taking the Northern dialect of Han people (the majority ethnic group in China) around the capital Peking as the basis of its speech and modern exemplary writing at the time as the basis of its standard written grammar. It is also useful to note that with such selection, the grammar of the speech and the writing was actually quite close to each other. However, it is important to note that as Cantonese speech does have some idiosyncratic lexicon and grammar (inherited from ancient language in the Central China and subsequent lifeworld practices in Southern China), it does not correspond completely to the written form of this standard Chinese defined by the Nationalist Party government.

Basically, upon the change in sovereignty in Mainland China in 1949, the new government inherited the same written and spoken forms of the Chinese national language, except there was then the subsequent simplification of the Chinese characters described above. The Chinese government now uses the term “Putonghua” to refer to the speech, and “Modern Standard Chinese” to the writing, of the national language of China. In 1956, the Chinese government further designated Putonghua

as the lingua franca of the nation. According to the National Language Policy 2000,¹ Putonghua is the basic broadcasting language in radio and TV media in Mainland China. In terms of number of users, it has been estimated that 72% of the Chinese population have Putonghua or a mutually intelligible regional variety of it as their mother-tongue. As the standard language of nation, the embedded value of Putonghua is multifarious: it is not only an asset in communication and job seeking, and it also embodies a form of national identity.

Not surprisingly, after the Sino-British Declaration was announced in 1984 that the sovereignty of Hong Kong would be returned to China in 1997, Putonghua was introduced by the Hong Kong government to local primary and secondary schools in 1986 and 1988, respectively, and Putonghua became a core subject for Primary 1 to Secondary 3 students in 1998. It has been an independent subject in the Hong Kong Certificate of Education Examination (HKCEE) since 2000 and is either an optional or a compulsory subject in many programs in tertiary institutions now.

Cantonese's status pales in comparison with Putonghua, though it still remains as a major Southern dialect of China. In fact, Pierson (1988) found that most Cantonese speakers acknowledge that Cantonese is not a national language, and it is not supposed to be formally written. However, with the opening up of the South and East special economic zones of China, the influence of Cantonese on Putonghua and vice versa has become very conspicuous. There has been considerable absorption into Putonghua of vocabulary associated with innovative practices in Hong Kong and a reciprocal acceptance of various Putonghua written expressions into Cantonese. Another factor facilitating the learning of Putonghua by Hong Kong people is that, although Cantonese differs from Putonghua in pronunciation, there are some systematic patterns in the difference, and both speeches largely correspond to the same set of Chinese characters (though there is some simplification of the writing of the characters used in the Mainland). Thus, the learning of Putonghua is much less difficult for most Cantonese speakers than the learning of English.

While Cantonese has a lower status nationally, its status of being the everyday lingua franca remains more or less the same among the majority people of Hong Kong despite the handover of sovereignty in 1997. Cantonese still symbolizes the unique identity of the majority Hong Kong people. Part of the seeds for this identity were sown by the colonial government in the 1970s, while social reform was carried out to inculcate a sense of local belonging among Hong Kong people after the outbreak of social disturbances in 1966 and the anti-British riots in 1967. The social reform included housing and medical development, anti-corruption and promoting of the idea of Hong Kong-ers and Lion-Rock Spirit (people from different origins coming to the place to work hard together for a new future). Cultural products (song, movies, TV shows) in Cantonese also began to flourish and got diffused to Chinese diasporas in different parts of the world. A lot of Hong Kong people were proud of the dialect of Hong Kong and its vocabulary. Thus, for quite a long time the language of this

¹ The National Language Policy was passed in 2000, and the corresponding documents were released in 2001.

Table 1.1 2016 population census: school attendance rates by school age group and sex, 2016

Age group	School attendance rates (%)		
	Male	Female	Overall
3–5	92.7	92.3	92.5
6–11	100	100	100
12–17	97.6	98	97.8
18–24	50.8	52.7	51.8
25+	0.6	0.6	0.6
Overall	17.8	14.7	16.1

Source Census & Statistics Department, 2016. Hong Kong 2016 population by-census main report: Volume I

“Hong Kong-er” identity has been Cantonese, and, to a certain extent, a mixture of Cantonese and English.

The cohesiveness of Hong Kong as a Cantonese-speaking population has also been enhanced through access to Cantonese radio by the population at large, especially between the early 1950s and 1970s. There was a decrease in speakers of home dialects (i.e. dialects of various parts of China, where the people were from) from 17 to 4.4% and an increase in Cantonese from 86.2 to 90.8% between 1961 and 2006 (Bacon-Shone & Bolton, 1988; Census & Statistics Department, 2006). The implementation of free primary education in 1971 enabled 99.9% of the 6–11 years age group to receive education in mostly government-funded primary schools (Census & Statistics Department, 2006). The percentage of the population attending full-time education² by age and sex is depicted in Table 1.1. In most primary schools, the verbal MOI is Cantonese.

In effect, the use of Cantonese as the lingua franca in oral communication in education, government and administration circles in Hong Kong is testimony to its political significance. Cantonese may be perceived as symbolic of the preservation of “two systems” in the “one country, two systems” principle. As Pierson (1998) observes, “Cantonese could have ... a symbolic value ... Cantonese might ... become the symbol of freedom, democracy and independence” (p. 107).

However, it is important to point out that there is in fact nothing in the Basic Law of Hong Kong, about what Chinese language should primarily mean in the Hong Kong SAR context. The adoption of traditional characters and Cantonese as the default versions of written and spoken Chinese in Hong Kong has only been the policy and practice adopted so far by the SAR government. While Basic Law is supposed to stay largely stable for 50 years from 1997 to 2047, government policy may be much more susceptible to changes at any time.

² Figures include students of half-day kindergartens, primary schools, secondary schools, special education schools and the Hong Kong Institute of Vocational Education’s courses at technician and craft level.

1.3.2 Socio-economic Context

The growth in importance and stature of the use of Chinese in Hong Kong society, however, does not mean that the importance of English has conversely diminished. Politically, the gradual democratization in the 1980s and 1990s under the British rule and then the reunification with China from 1997 have changed the way Hong Kong people think and live. A major challenge facing Hong Kong people in the twenty-first century is how to sustain their international ties and competitiveness while being re-absorbed into motherland China. In fact, many commentators believe that Hong Kong needs English at an even more sophisticated level than before. This is reflected in the language policy of the education authority to promote “bi-literacy (Chinese and English) and ‘tri-lingualism’ (Chinese, English and Putonghua)” among all students in schools at both primary and secondary levels (Education Commission, 1997).

Hong Kong has long been a meeting place of East and West. Different cultures coexist in harmony, and its cosmopolitan nature is evident from the retention of English as one of its two official languages, its large expatriate population, strong network of international schools, an apolitical civil service and its cross-cultural lifestyle. On the return of sovereignty to China in 1997, there was a natural expectation that there will be greater use of Chinese in the society. However, Hong Kong society knew that its proficiency in English was a valuable asset, particularly in the fields of commerce, international law and international trading. English is the most widely used international language and the most commonly taught foreign language in the world. Although Chinese is the language of the largest populated nation in the world, its use is largely restricted to a particular geographical area. Hong Kong can act as a window to the world for China’s rapidly evolving economy. China itself is well aware that most commercial transactions in Hong Kong, apart from those with China, are conducted through the medium of English. In order to preserve Hong Kong as an international financial centre, China has insisted that the status of English be maintained in Hong Kong.

Knowledge of English is an important asset in work for many Hong Kong people. English plays a significant role in Hong Kong’s thriving tourist industry that generates an enormous amount of income for the economy. Since many tourists come from different countries, English is a common means of communication, and proficient English speakers are required in all service industries, from taxi drivers, salesmen in department stores, waiters in restaurants to staff in hotels. Undoubtedly, the economic stability of Hong Kong relies a great deal on its education service being able to produce a supply of well-educated people who are able to communicate in English.

English is a crucial tool for higher education in Hong Kong and overseas. A qualification in both English and Chinese is an essential basic entry requirement to the universities in Hong Kong, and this places pressure on candidates to master these languages. The ability to read and comprehend English is a prerequisite for prospective scientists, technologists and technicians in many fields of specialization. Every year a substantial number of students go abroad to study in English-speaking countries like Great Britain, Canada, the USA and Australia. In 2011 for example,

there were 75,000 students aged 25 or below studying in Canada (8.9%), Australia (23.7%), the UK (25.9%), the USA (19.6%) and other regions/countries including Mainland China (21.9%) (Census and Statistic Department, 2011).

Indeed, the shift of Hong Kong from manufacturing to knowledge-intensive service industries and, within manufacturing itself, the shifting out of manual assembly into higher value-added production programs have further increased the demand for a better educated workforce with English proficiency. In short, the more proficient school leavers are in English, the better the job opportunities they likely enjoy. Parents know from their own experience that a good command of English is often essential for promotion. They therefore perceive English as the gateway to a brighter future for their children. In fact, the demand for employees with effective and wide-ranging skills in English is likely to increase in view of China's accession to World Trade Organization, when a larger market and an even greater number of international business transactions may be expected.

On a different plane, knowledge of English also affords Hong Kong-ers with an additional language medium for accessing material and cultural products from the world. It can serve as a medium of pleasure and entertainment. With proficiency in English, one can feel comfortable going to international restaurants, reading English newspapers or books and enjoying films and radio/TV programs in English. As a result, people's range of aesthetic experience and entertainment is broadened.

As for Chinese language, Hong Kong also experiences a continuous rising of its economic value since the 1990s. With the opening up to the West of the Chinese economy, Hong Kong's economy has gradually merged with the Pearl River Delta economy, and their combined influence spread northwards. China's accession to the World Trade Organization in early 2002 has opened up new horizons and created golden opportunities for Hong Kong professionals, businessmen and entrepreneurs to get into business activities in Mainland China. This also includes the working with business partners from overseas and Taiwan who come to invest in Mainland China. Because of this, the job demand for Chinese language proficiency has increased drastically, including the command of written Chinese in both the simplified and traditional characters, and spoken Chinese in Putonghua.

1.3.3 Sociocultural Context

1.3.3.1 Language and Cultural Orientation

As reported by the Census and Statistics Department (2016), 88.9% of the total population of Hong Kong speak Cantonese. But the proportions of the population able to speak English and Putonghua, either as the usual language or as another language, account for 53.2% and 48.6% of the population. The English language and the English-speaking community are characterized as a "constant and persistent, but psychologically distant" force (Pennington, 1994, p. 149). English in Hong Kong is regarded as part of an "outwardly oriented, non-in-group, non-home, and non-family

values” culture by many Hong Kong people (Pennington, 1994, p. 86). In contrast, Cantonese is associated with inward values, including certain traditional Chinese traits, family values, indigenous characteristics and strength of personality.

A strong “ethnolinguistic vitality” and strong intragroup cohesion in the Cantonese-speaking community has been observed in Hong Kong (Giles et al., 1977; Pennington, 1994). In fact, Cantonese is most likely used, except in the presence of a non-Cantonese speaker, for personal exchanges in both institutional and non-institutional contexts. Educated Cantonese speakers in Hong Kong, however, do use English in formal functions, and it is commonly used for communication with native speakers of English as well as a lingua franca for interacting with other non-native speakers of English who do not speak Cantonese (including those Mainlanders who graduated from overseas and speak fluent English, but not Cantonese.)

Despite being highly cosmopolitan due to its international trade ties, as the majority population of Hong Kong is Chinese, the deeply rooted Chinese culture in the population could not be underestimated (Ng, 1998). The diversity or gap in cultural belief between older and younger generations, people of different social classes and places of origin and those who are proficient in English and those not can actually be quite large.

1.3.3.2 Mindset About Education and MOI

Despite the advantages of Hong Kong citizens being proficient in English, the decision to use English as MOI has continuously been debated. Research conducted by the Education Department and the University of Hong Kong on the relationship between the instructional medium in school has highlighted a number of issues in the quality of learning when English is used as the MOI. If the language medium is no impediment (i.e. with L1 as MOI), students perform better in terms of learning mood, participation and achievement than when they are disadvantaged by having to study in a language other than their mother-tongue (Leung, 1990). The research suggests that only 30% of the secondary school population can reap the full benefits of learning, having had English as a medium of instruction (EMI) during their schooling (HKED, 1989). However, the supremacy of EMI has long been inculcated in the minds of parents and students of Hong Kong.

Hong Kong did not guarantee a 9-year compulsory education until 1978. Before that, schools were mainly for the more academically capable ones or those who could afford the tuition. Beginning from early colonial era, there were mainly three types of prestigious schools, and they all use EMI. The first kind was government schools. Most of them adopted EMI, as they were to provide the elite students pathway to university and/or becoming civil servants. The second kind was church schools. A lot of preachers from Europe came to Hong Kong for missionary work in the mid-nineteenth century. They established church schools and also taught in these schools and naturally adopted EMI. Then with time, these church schools developed into name-brand elite schools, well known for their long history and prestigious status.

The third kind was international schools. They were initially for the children of expats or government officers hired from the UK, and the students would normally pursue their further study in other places overseas. Therefore, they adopted EMI and followed GCE (and SAT or IB curriculum as well in recent decades) for connecting to overseas universities. In recent decades, international schools have started to issue debentures and attracted a lot of well-off Chinese parents who want their children to have better English proficiency or to study abroad.

Obviously, only a small proportion of students could study in these better-condition schools described above. During baby-boom period after WWII, the vast majority of students of grass-root families were educated in private schools organized by various local benevolent bodies with limited resource and very basic premises (even like rooftops or floor units of low-cost housing buildings). These schools for the grass roots typically use Chinese as MOI (CMI). When the government decided in the 1970s to move towards 9-years compulsory education, many of these private schools then became subsidized schools, supported with government subsidy for operation, improvement and expansion.

Hence, in the history of Hong Kong education development, almost all traditionally prestigious schools or schools for the more well-off families used EMI. More importantly, all the universities in Hong Kong generally use EMI, except for Chinese-related subjects. All these jointly reinforce the idea of EMI means better quality education. Hence in the late 1970s and 1980s, when many subsidized schools were founded under the implementation of the 9-year compulsory education policy to serve the majority grass-root students, a lot of them, especially those at the secondary level, chose to adopt EMI.³

This belief of language supremacy has also lead to the belief of language purism. In the traditionally prestigious EMI schools, there has been a common belief that no Chinese, the mother-tongue of most of their students, is encouraged or even allowed in lessons, except in subjects directed to Chinese (such as Chinese language, literature or history). This phenomenon of English supremacy and language purism both reflect the power hierarchy in society. Obviously, when language difference is tied to social status, pure English in BBC accent could give you honour while Chinglish (a mix of Chinese and English) in Cantonese accent shame.

For the 30% top ability of the secondary school population (as mentioned in the HKED 1989 research), they could manage to benefit from EMI and acquire good English as well as academic knowledge. But for the large number of secondary schools which used EMI in teaching the majority students, the situation was just opposite to the language purism belief: English textbooks were used; examination and homework were in English; but classroom talk was mainly in Cantonese, with

³ The government began the Direct Subsidy Scheme (DSS) in the 1990s. DSS schools get subsidy from government for their student intake, but they have more autonomy in terms of the curriculum, tuition fee and admission requirements. So, they may charge students a higher tuition fee than the normal subsidized schools (Chan & Tan, 2008). Most of the direct subsidy schools offer two streams following international and local curriculum, typically also with English as the MOI. Once again, English as medium of instruction was associated with higher class people and a better chance of study abroad.