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Panel on Education

**Background brief prepared by the Legislative Council Secretariat
for the special meeting on 15 January 2009**

Medium of instruction for secondary schools

Purpose

This paper summarizes the discussions of the Panel on Education (the Panel) on issues relating to the medium of instruction (MOI) policy for secondary schools.

Background

2. The Administration promulgated in 1997 and implemented in 1998 the MOI Guidance for Secondary Schools (the MOI Guidance). According to the MOI Guidance, schools which adopt English as MOI (EMI schools) must demonstrate their fulfilment of the three prescribed criteria, namely, student ability, teacher capability and support measures. As a result of the implementation of the Guidance, the number of EMI schools has been maintained at 112 and some 300 schools have adopted Chinese as their MOI (CMI schools).

3. In 2000, the Administration accepted the recommendation of a joint working group set up by the former Board of Education and the Standing Committee on Language Education and Research that the MOI arrangements for secondary schools should be reviewed in the 2003-2004 school year alongside the review of the Secondary School Places Allocation (SSPA) mechanism. The Education Commission (EC) set up in July 2003 a Working Group on Review of SSPA and MOI for Secondary Schools (the Working Group) to take forward the review.

4. In February 2005, the Working Group published the "*Review of Medium of Instruction for Secondary Schools and Secondary School Places Allocation - Consultation Document*" for public consultation. After taking into account the views collected during the consultation period, the Working Group issued in December 2005 the "*Report on Review of Medium of Instruction for Secondary Schools and Secondary School Places Allocation*" (the Report) which set out its

recommendations on the long-term MOI arrangements for secondary schools. The Working Group affirmed that the overall direction of the MOI policy should be "*to uphold mother-tongue teaching and enhance English proficiency concurrently*". The Working Group did not object to allowing some schools to adopt English as their MOI, subject to their fulfillment of the prescribed criteria to ensure quality. With a view to nurturing students' proficiency in both Chinese and English, the Working Group set out a series of measures to enhance the teaching and learning of English. The major recommendations of the Working Group which were accepted by the Administration are in **Appendix I**.

Fine-tuning of the MOI policy

5. On 26 February 2008, the Education Bureau (EDB) issued a press release announcing that the Administration was determined to uphold mother-tongue teaching but would be prepared to make some adjustments to the existing MOI policy to allow certain degree of flexibility for schools to enhance students' exposure to English and to raise their motivation and interest in learning English. The adjustment to the MOI policy must be premised on the following broad principles:

- (a) the three objective criteria of student ability, teacher capability and support measures must continue to be taken into account in considering whether English should be adopted as the MOI;
- (b) there must be a defined mechanism to ensure effective implementation; and
- (c) there should be a high degree of transparency to ensure that the community and parents are well informed of the specific MOI framework put in place by individual schools, the rationale and implementation details.

6. The following proposals are being considered by the Administration under the refined MOI policy:

- (a) in order to increase the exposure to English during lesson time for students learning in their mother tongue, schools may increase the percentage of total lesson time allowed for English-medium extended teaching activities from the original 15%, 20% and 25% for Secondary 1 (S1), S2 and S3 respectively (the percentages refer to the proportion of lesson time for English-medium extended teaching activities to the total lesson time for subjects other than English) to a maximum of 25% for each of the junior secondary levels. This is generally described as MOI arrangements "by sessions";

- (b) if a school has admitted to a class a critical mass of S1 students who have the ability to learn all subjects in English (i.e. students belonging to the "top 40% group"), it may enjoy flexibility in deciding the MOI for that class. Specifically, if the average proportion of S1 intake belonging to the top 40% group in the previous two years reaches 85% of the size of a class, the school may use English to teach all or some subjects in the class(es) concerned. This is generally called a "by class" arrangement; and
- (c) to reduce the labelling of students who are not studying in the classes under (b) above and to increase their exposure to English, consideration may be given to allowing the schools concerned to adopt EMI for individual subjects within a certain limit.

Deliberations of the Panel

7. The Panel received the views of 22 deputations on the fine-tuning proposals at its meeting on 17 July 2008. They included school councils, teacher unions, parent associations and academics. While the majority of the deputations expressed support for the fine-tuning proposals, some indicated objection. The concerns and discussions of members are summarized below.

Reasons for the fine-tuning proposals

8. Members noted that under the existing MOI policy, schools were bifurcated into CMI schools and EMI schools. This was known as the between-school streaming approach. Members considered that the proposed fine-tuning proposals were more than a refinement and involved a fundamental change to the MOI policy as the within-school approach, i.e. a school could have both EMI and CMI teaching for the MOI arrangement, would be adopted. Members were concerned that the fine-tuning proposals would intensify labelling within schools and among students.

9. The Administration explained that although mother-tongue teaching could remove the language barriers for students, students learning in mother-tongue had limited exposure to English during lesson time and this might affect their bridging over to EMI teaching at senior secondary and/or post-secondary levels. The bifurcation of schools into CMI schools and EMI schools might not fully meet the needs of individual students. Moreover, the labelling of secondary schools as CMI schools and EMI schools had adversely affected schools and students alike, creating undue pressure on the teachers and students in CMI schools and dampening the students' motivation to learn English. The Administration stressed that the aim of the fine-tuning proposals was not to over-turn the MOI policy. Their objectives were to increase the exposure of junior secondary students to English inside the classroom and to minimise the labelling effect arising from the classification of secondary schools into CMI schools and EMI schools.

10. Some members pointed out the need to distinguish between the MOI policy and the English proficiency of students. They shared the view expressed by some deputations that the proper way to raise the English standard of students was to improve the quality of teaching of the subject of English Language by upgrading teacher capability and learning of the subject from primary levels. For this purpose, a suggestion was made to adopt small class teaching for the subject of English Language at primary and secondary levels. The Administration agreed to examine the feasibility and financial implications of the suggestion.

Teacher capability

11. Members considered that the successful implementation of the fine-tuning proposals would depend on the capability of teachers to teach in English. They noted the concern expressed by some deputations that teachers in CMI schools were worried about using English to teach non-language subjects. Members also shared the concern of some deputations about the additional workload created on teachers as they would have to prepare bilingual teaching materials and assessment papers. As the secondary student population was expected to decrease from 80,000 to 50,000 in the next five years, resulting in school closure, there was a concern that CMI schools would endeavour to run more EMI classes in order to enhance student enrolment, without regard to teacher capability and student ability.

12. In the view of the Administration, it was inappropriate to assume that teachers were not capable of teaching in English. The Administration recognized the importance of student ability and teacher capability for EMI teaching. Various measures had been implemented to raise the English proficiency of students starting from the primary level such as the introduction of the Native-speaking English Teacher Scheme in primary schools. The Administration also agreed that teachers assumed an important role in enhancing the quality of English teaching, and the Administration had been disseminating effective pedagogies and practices among schools for reference. The Administration was considering support measures to assist teachers to implement the fine-tuning proposals, which aimed at giving schools greater flexibility in making professional judgment to choose an appropriate MOI under the prescribed criteria.

Monitoring mechanism

13. Members sought information on the monitoring and quality assurance mechanism should schools be given the flexibility to decide MOI. They were concerned whether CMI schools would be allowed to adopt EMI for subjects without meeting the three prescribed criteria on student ability, teacher capability and support measures for EMI teaching.

14. The Administration advised that schools would be required to meet the three prescribed criteria. However, in response to the view that all students should be given an opportunity to learn in English at junior secondary levels, and in so doing to alleviate the labelling effect on individual students and give them greater

incentive to learn, the Administration was examining the justifications for allowing all schools, irrespective of student intake, the flexibility to adopt EMI for individual subjects within a certain limit, subject to the teachers concerned fulfilling the relevant criterion.

15. To reduce the labelling effect on CMI schools, members suggested that the University Grants Committee (UGC)-funded institutions should consider accepting alternative English qualifications for admission to their undergraduate programmes under specified circumstances, as in the case of the acceptance of alternative Chinese qualifications to enhance the opportunity of non-Chinese speaking students for university education. The Administration undertook to relay the suggestion to UGC and the UGC-funded institutions for consideration.

Implementation timetable

16. According to the Administration, it was consulting the stakeholders on the establishment of a fair, open and transparent mechanism to monitor the implementation of the fine-tuning proposals without compromising the quality of education and the interests of students. The Administration hoped that a consensus could be reached on the best model and timing for implementing the refined MOI policy. The schedule of implementation would depend on the progress of discussions. If no consensus could be reached on the fine-tuning proposals, the status quo would be maintained, and the first review of MOI status for individual schools as recommended in the Report would be implemented as scheduled in the 2010-2011 school year.

Relevant papers

17. A list of the relevant papers on the Legislative Council website is in **Appendix II**.

Major recommendations of the Working Group on medium of instruction (MOI) policy for secondary schools

Conceptual framework of MOI policy

The Working Group upheld the rectitude of mother-tongue teaching and re-affirmed the policy considerations behind the MOI Guidance. The Working Group considered it more desirable to continue with the bifurcation approach than to adopt a within-school approach. In charting the way forward for the MOI arrangement, the Working Group arrived at the following conceptual framework –

"In principle, all secondary schools should adopt mother-tongue teaching at junior secondary levels. There is no objection to individual schools using English as the MOI if they fully meet the prescribed criteria of student ability, teacher capability and support measures. However, the Working Group encourages these schools to adopt mother-tongue teaching. All secondary schools (including CMI schools) should endeavour to raise the English proficiency of their students."

Prescribed criteria for EMI teaching

Student ability to learn through English

2. For the purpose of assessing students' ability to learn through English, the Working Group recommended that -

- (a) students' internal assessment results in primary schools in the second term of Primary five (P5) and the first and second terms of P6 would be taken as the basis;
- (b) the internal assessment results would be scaled by the pre-Secondary one Hong Kong Attainment Test (pre-S1 HKAT) currently conducted annually;
- (c) samples of the pre-S1 HKAT results would be collected biennially and average of the results of the two most recently sampled pre-S1 HKATs would be taken to derive the instrument to scale primary schools' internal assessment results of the coming cohort of P6 students proceeding to S1; and
- (d) the top 40% of students on the basis of the scaled scores would be taken as having the ability to learn through English.

3. For school level, the Working Group recommended that -
- (a) schools intending to adopt English as MOI must have at least 85% of its S1 students being able to learn through English;
 - (b) should EMI teaching by class be adopted, such a class should have at least 85% students being capable of learning through English;
 - (c) should schools be bifurcated into EMI and CMI schools, an EMI school should have at least 85% of its S1 intake being capable of learning through English; and
 - (d) for "through-train" secondary schools intending to adopt English as the MOI, the threshold percentage of EMI-capable S1 intake could be flexibly lowered to 75%, but this percentage only applied to S1 entrants from the linked primary schools. As for S1 intake from other primary schools, the threshold percentage should be maintained at 85%.

Teacher capability to teach through English

4. Regarding teacher capability to teach through English, the Working Group recommended that -
- (a) the specific basic requirement for EMI teachers should be a Grade C or above in English Language (Syllabus B) of the Hong Kong Certificate of Education Examination (HKCEE) or its equivalent;
 - (b) for serving EMI teachers who had not attained the qualification or its equivalent, they might meet the specific basic requirement within two years from the 2005-2006 school year, or opt for classroom observation by subject and language experts; and
 - (c) EMI teachers should accumulate a minimum of 15 hours of EMI-related continuous professional development activities for every three years.

School support measures

5. The Working Group recommended that schools using English as the MOI should purposefully and strategically devise school-based measures for supporting EMI teaching and should set out the related strategies and support measures in their school development plans and annual school reports. The former Education and Manpower Bureau (re-organized as the Education Bureau (EDB) on 1 July 2007) should assess and monitor the implementation of the support measures under the existing framework of quality assurance and schools' self evaluation.

MOI arrangements at school level

Junior secondary levels

6. The Working Group recommended that the mother tongue should be the principal MOI for secondary schools and the between-school streaming arrangement should be maintained. A school should adopt the same MOI in all junior secondary classes. If individual schools chose to adopt English as the MOI, they had to meet the three prescribed criteria of student ability, teacher capability and support measures. The choice of EMI for these schools should be subject to a review every six years for quality assurance. Schools changing their MOI status should announce their arrangements one year before implementation. Any changes should start with the S1 classes and progress each year to a higher grade level.

Senior secondary levels

7. Subject to the fulfillment of the criteria on teacher capability and support measures, secondary schools adopting mother-tongue teaching at junior secondary levels might, in consideration of the student ability, choose to adopt EMI teaching at senior secondary levels for certain subjects in some classes. However, they were required to -

- (a) put in place well-designed bridging programmes and support measures systematically and strategically at junior secondary levels so as to help students get prepared; and
- (b) meet the same criteria on teacher capability and support measures as prescribed for EMI teaching at junior secondary levels.

8. Schools adopting EMI teaching at junior secondary levels should continue to adopt English as the MOI at senior secondary levels. They should use English to teach Liberal Studies under the new academic structure for senior secondary education. EDB might, however, determine which modules/themes under Liberal Studies might be allowed to be taught in Chinese by these schools.

MOI Arrangements for Direct Subsidy Scheme Schools

9. Direct Subsidy Scheme secondary schools might maintain the existing flexibility in MOI arrangements. They might adopt different MOI by class according to students' ability. However, they were not allowed to adopt different MOI by subject at junior secondary levels.

Enhancing English proficiency of students in CMI schools

10. The Working Group recommended the following measures to enhance English proficiency of students in schools adopting mother-tongue teaching -

- (a) schools adopting mother-tongue teaching at junior secondary levels might choose to allocate, on top of English Language lessons, not more than 15%, 20% and 25% of the total lesson time at S1, S2 and S3 respectively for extended learning activities conducted in English;
- (b) additional resources currently provided for CMI schools should continue and these schools should be allowed to opt for replacing part or all of the additional teaching posts with a cash grant; and
- (c) the Government should make an injection into the Language Fund for supporting an English enhancement scheme for schools adopting mother-tongue teaching. Participating schools would be provided with non-recurrent additional grants. They should undertake to attain agreed performance targets on capacity building for effective teaching of English and on students' academic attainment in English

Implementation timetable for MOI recommendations

11. The implementation of the revised MOI arrangements for secondary schools, viz. the first review of MOI status for individual schools, would be deferred from the 2008-2009 school year to the 2010-2011 school year. Schools wishing to adopt English as the MOI should demonstrate to EDB that they had satisfied the two criteria on teacher capability and support measures when submitting their applications in the 2008-2009 school year. The ability of S1 intake in September 2008 and September 2009 would be taken into account in determining whether a school had met the student ability criterion.

Council Business Division 2
Legislative Council Secretariat
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**Relevant papers on
medium of instruction for secondary schools**

Meeting	Date of meeting/ issue date	Paper
Panel on Education	21.5.2001 (Item VII)	Minutes Agenda
Panel on Education	14.3.2005 (Item V)	Minutes Agenda
Legislative Council	16.3.2005	Official Record of Proceedings Pages 11 - 14 (Question)
Panel on Education	6.4.2005 (Item IV)	Minutes Agenda
Panel on Education	12.12.2005 (Item IV)	Minutes Agenda
Legislative Council	23.1.2008	Official Record of Proceedings Pages 58 - 59 (Question)
-	26.2.2008	Press release issued by the Education Bureau on way forward for the medium of instruction policy
-	16.3.2008	Speech by the Secretary for Education on the medium of Instruction policy
Panel on Education	17.7.2008 (Item I)	Minutes Agenda