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**Panel on Education**

**Updated background brief prepared by the Legislative Council Secretariat  
for the special meeting on 11 July 2009**

**Medium of instruction for secondary schools**

**Purpose**

This paper summarizes the discussions of the Panel on Education (the Panel) on the fine-tuning of 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 fulfilment 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 Administration proposed to fine-tune the MOI policy as follows -

- (a) there would no longer be pure bifurcation of schools into CMI and EMI schools. If a school had admitted to a class a critical mass of Secondary 1 (S1) students who had the ability to learn all subjects in English (i.e. students belonging to the "top 40% group"), it might 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 reached 85% of the size of a class, the school might use English to teach all or some subjects in the class(es) concerned. This was generally called a "by class" arrangement; and
- (b) other students mainly learned contents subjects in their mother tongue. In order to increase the exposure to English during lesson time for students learning in their mother tongue, schools might increase the percentage of total lesson time allowed for English-medium extended teaching activities (ELA) from the original 15%, 20% and 25% for S1, S2 and S3 respectively (the percentages referred to the proportion of lesson time for ELA to the total lesson time for subjects other than English) to a maximum of 25% for each of the junior secondary levels. This was generally described as MOI arrangements "by sessions".

6. At its meeting on 26 May 2009, the Executive Council endorsed the above fine-tuning proposals for implementation with effect from September 2010. It was also agreed that schools could transform the 25% ELA time into the adoption of EMI in individual subjects, up to a maximum of two subjects.

## **Deliberations of the Panel**

7. The Panel discussed the fine-tuning proposals at its meetings on 17 July 2008, 15 January and 29 May 2009 and received views from stakeholders at two of these meetings before the fine-tuning arrangements were finalized. While most of the parent-teacher associations expressed support for the fine-tuning proposals, some principals and teachers indicated objection. The discussions of members are summarized below.

### Justifications for fine-tuning the MOI policy

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 fine-tuning proposals were more than a refinement and involved a fundamental change to the MOI policy with the adoption of the within-school approach, i.e. a school could have both EMI and CMI teaching for the MOI arrangement. Members were concerned that the fine-tuning proposals would intensify labelling within schools and among students, and create confusion and conflicts among individual schools and parents, particularly on how to admit students to EMI or CMI classes.

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. There were views in the community that while mother-tongue teaching had enhanced learning effectiveness, students were less confident and motivated in learning English. The lack of an environment for English learning was a problem to tackle. 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 overturn 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 doubted the effectiveness of enhancing students' English proficiency by adopting EMI for content subjects. They shared the view expressed by some deputations that a more direct and effective approach to enhance the English proficiency of students was to improve the teaching and learning of the subject of English Language. For this purpose, it was suggested that small class teaching should be adopted for the teaching of English Language and remedial English lessons be provided for academic low-achievers. Members believed that with appropriate pedagogies and support, all students could be expected to attain a

satisfactory level of English proficiency after 12 years of primary and secondary education.

11. Members also considered that to reduce the labelling effect on CMI schools, 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 view to UGC and the UGC-funded institutions for consideration.

#### Autonomy in deciding MOI

12. Some members supported the fine-tuning arrangements to give greater flexibility to schools in deciding the appropriate MOI. Other members, however, were worried that to enhance enrolment, some schools would make use of the ELA time to adopt EMI for certain science subjects, irrespective of the readiness of teachers and the ability of students. This would have profound impact on local student performance in science subjects which ranked high by international standards. There was a view that the MOI policy should facilitate and enhance students' motivation and interest to learn. Schools should be given full autonomy in determining the MOI arrangements, including the use of English or Chinese textbooks with different oral medium, and the adoption of EMI should not be subject to the three prescribed criteria of "student ability", "teacher capability" and "support measures of schools".

13. The Administration explained that schools would be given greater flexibility in determining the MOI arrangements in a professional manner under the fine-tuning framework. CMI teaching, by definition, should include adopting Chinese primarily in teaching in class, supported by Chinese textbooks and teaching materials with assessment and evaluation primarily in Chinese to facilitate students to reinforce what they had learnt. The same principles applied to EMI teaching. Given the flexibility under the ELA time, teachers might use English materials/resources, where appropriate, to enhance teaching and learning of content subjects which were conducted primarily in Chinese. In deciding whether "by-subject" arrangements should be adopted, schools had to take into account factors such as whether these would fit into the whole school curriculum throughout the secondary levels, the students' needs, interests and learning progress, the school circumstances including teachers' capability and readiness, etc.

14. To mitigate the concern about under-enrolment arising from the drop in student population, some members suggested that the consolidation policy for secondary schools should be put on hold. The Administration pointed out that various measures had been adopted to maintain the stability of school development and teaching force for the implementation of the new senior secondary academic structure. Different development options were made available to under-enrolled schools. These included injection of additional resources by the school

sponsoring body, merging/collaboration with other schools, undergoing special review, joining the Direct Subsidy Scheme, and turning to private operation.

#### Teacher capability and workload

15. Members considered that the successful implementation of the fine-tuning arrangements 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 content 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.

16. 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, and had implemented various measures 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 had been disseminating effective pedagogies and practices among schools for reference. Supply teachers would be made available to encourage content subject teachers who might be required to switch their MOI from CMI to EMI to attend professional development courses. In addition to the current study on ELA, another longitudinal study would be commissioned to analyze the effectiveness of and collect data on different teaching modes. A total of about \$640 million would be set aside during the five-year period from 2010 to 2014 for the implementation of the various support measures.

17. To enhance the English proficiency of local teachers and students, there was a suggestion that the Administration should provide resources for them to participate in overseas English immersion programmes. Members welcomed the establishment of a scholarship for qualified school graduates planning to pursue a relevant degree and teacher training in English Language and undertake to teach in a local school, preferably primary school, for at least three years. They noted that the Administration proposed to offer courses on pedagogy and subject knowledge for serving teachers who had yet to attain the qualifications set out by the Standing Committee on Language Education and Research.

#### Monitoring

18. Members sought information on the monitoring and quality assurance mechanism after schools had been given greater flexibility to decide their MOI arrangements. Members were worried that EDB could not stop the schools

concerned from adopting EMI for certain subjects even though both their teachers and students were not ready for EMI teaching. To enhance enrolment, schools belonging to bands 2 and 3 would likely convert the ELA time into EMI for two content subjects.

19. The Administration advised that the three prescribed criteria of student ability, teacher capability and support measures for schools in using English as recommended in the Report would be upheld. Schools would be held accountable for their MOI arrangements in relation to the learning outcomes of students. In line with the School Development and Accountability Framework, schools should include in their development plans, which would be published on their websites, their whole-school language policy, the school-based MOI arrangements and the rationale for the arrangements adopted, and the relevant arrangements, such as teachers' readiness in adopting EMI and school-based support measures to facilitate teaching and learning of content subjects in English.

20. The Administration further assured members that it would continue to conduct external review and step up focused inspections under the existing mechanism to help schools, in particular those which intended to adopt the "by-subject" arrangement, review the effectiveness of their MOI arrangements. In case of non-compliance, the Administration would consider issuing warning letters to the schools concerned and make it known to the public, and take appropriate follow-up actions.

### **Relevant papers**

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

Council Business Division 2  
Legislative Council Secretariat  
8 July 2009

### **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.

**Relevant papers on  
medium of instruction for secondary schools**

<b>Meeting</b>	<b>Date of meeting/ issue date</b>	<b>Paper</b>
Panel on Education	21.5.2001 (Item VII)	<a href="#">Minutes</a> <a href="#">Agenda</a>
Panel on Education	14.3.2005 (Item V)	<a href="#">Minutes</a> <a href="#">Agenda</a>
Legislative Council	16.3.2005	<a href="#">Official Record of Proceedings Pages 11 - 14 (Question)</a>
Panel on Education	6.4.2005 (Item IV)	<a href="#">Minutes</a> <a href="#">Agenda</a>
Panel on Education	12.12.2005 (Item IV)	<a href="#">Minutes</a> <a href="#">Agenda</a>
Legislative Council	23.1.2008	<a href="#">Official Record of Proceedings Pages 58 - 59 (Question)</a>
-	26.2.2008	<a href="#">Press release issued by the Education Bureau on way forward for the medium of instruction policy</a>
-	16.3.2008	<a href="#">Speech by the Secretary for Education on the medium of Instruction policy</a>
Panel on Education	17.7.2008 (Item I)	<a href="#">Minutes</a> <a href="#">Agenda</a>
Panel on Education	15.1.2009	<a href="#">Minutes</a> <a href="#">Agenda</a>
Panel on Education	29.5.2009 (Item I)	<a href="#">Agenda EDB(ECP)48/02(N)</a>