

**For discussion
on 16 March 2015**

Legislative Council Panel on Education

**The HKSAR Government Scholarship Fund and
Self-financing Post-secondary Scholarship Scheme**

Purpose

This paper briefs Members on the key features of the HKSAR Government Scholarship Fund (GSF) and the Self-financing Post-secondary Scholarship Scheme (SPSS) for the post-secondary education sector.

Overview

2. The Government is committed to providing our young people with quality and diversified study pathways with multiple entry and exit points, thus enabling them to unleash their full potential in accordance with their interests, aptitudes and abilities. At present, there are 19 local degree-awarding institutions in Hong Kong, of which nine are publicly-funded and the other ten are self-financing. In the 2014/15 academic year, about 300 undergraduate programmes and 400 sub-degree programmes are offered by the institutions. Through the parallel development of the publicly-funded and self-financing sectors, 38.4% of our young people in the relevant cohort have access to degree-level education in the 2013/14 academic year. Including sub-degree education, nearly 70% of them now have access to post-secondary education.

3. A scholarship is an investment in and recognition of young talents that encourages them to fulfil their aspirations and abilities. We need to groom and support post-secondary students in pursuing all-round development, striving for excellence and broadening their horizons and international outlook, thereby contributing to enhancing Hong Kong's competitiveness as Asia's world city amidst intense competition in a globalised knowledge economy. As the Government strives to support the parallel development of the publicly-funded and self-financing post-secondary education sectors, both GSF and SPSS have established a

diversity of scholarships and awards for giving recognition to deserving post-secondary students in pursuing excellence not only in academic performance, but also for achievements and talents in other non-academic fields.

GSF and SPSS

4. As part of a basket of measures to promote Hong Kong as a regional education hub and to enhance Hong Kong's attractiveness to quality students as a higher education destination, the Government established GSF with a commitment of \$1 billion in 2008 to provide scholarships to outstanding students pursuing full-time publicly-funded degree or above level programmes in Hong Kong.

5. For the self-financing post-secondary sector, we set up the Self-financing Post-secondary Education Fund (SPEF) with a commitment of \$2.5 billion in 2011 to support the quality and healthy development of the self-financing sector and further enhance Hong Kong's status as a regional education hub. SPEF provides scholarships for outstanding students of full-time self-financing sub-degree and undergraduate programmes under SPSS as well as supports quality enhancement projects by institutions¹.

6. There are several injections into GSF and SPEF between 2011 and 2013. In 2011, the Government injected \$250 million into the GSF to extend the benefits to students of full-time publicly-funded sub-degree programmes. In 2012, an additional \$1 billion each was injected into GSF and SPEF to establish more scholarships and awards to give recognition to post-secondary students not only of outstanding academic performance but also with achievements and talents in other non-academic fields. In 2013, another \$20 million was injected into each of the two funds to establish scholarship and award to give recognition to deserving post-secondary students with special educational needs (SEN)² in the pursuit of academic and other excellence.

Management of the scholarships

7. Both GSF and SPEF are set up under the Permanent Secretary for Education Incorporated who acts as the Trustee of the funds.

¹ Under the SPEF, two schemes have been set up, namely the Self-financing Post-secondary Scholarship Scheme and Quality Enhancement Support Scheme.

² SEN includes specific learning difficulties, intellectual disabilities, autism spectrum disorders, attention deficit / hyperactivity disorder, physical disability, visual impairment, hearing impairment, speech and language impairment, and others.

Steering Committees have been established for GSF and SPEF respectively to advise on the overall strategy and policy pertaining to the administration and development of the two funds. Investment Committees have also been set up for the two funds respectively to formulate investment policies and advise on the appointment of fund managers for the funds. The membership and terms of reference of the Steering Committee and Investment Committee of the two funds are set out at **Annex A**.

Types of scholarship and eligibility

8. Both GSF and SPSS operate on a merit basis. The following criteria, with appropriate adaptations to cater for different groups of students, are adopted for awarding scholarships to students –

- (a) high standard of academic performance;
- (b) demonstration of leadership and good communication skills;
- (c) valuable contribution to the institution/society; and/or
- (d) strong commitment to the Hong Kong community.

9. In addition to general scholarship schemes for outstanding local and non-local students, other scholarship and award schemes are launched under GSF and SPSS to cater for the development needs and priorities of the publicly-funded and self-financing post-secondary sectors. For instance, a targeted scholarship scheme to attract outstanding students from targeted regions has been set up under GSF to raise the profile of Hong Kong and to foster closer collaboration and relationship with places of strategic importance. In the case of SPSS, we have established a Best Progress Award (BPA) to encourage and recognise students with significant progress and improvement during their post-secondary studies.

10. Furthermore, the Talent Development Scholarship (TDS) and the Reaching Out Award (ROA) have been introduced to both funds since the 2012/13 academic year to recognise students who have demonstrated achievements or talent in non-academic areas, and support meritorious students who are nominated by institutions to participate in learning, internship or service programmes, as well as national, regional and international events and competitions that are conducted outside Hong Kong. To underline the importance in giving recognition to deserving post-secondary students with special educational needs, the Endeavour Scholarship / Merit Award (EDS/EMA) are introduced to GSF and SPSS since the 2013/14 academic year. Details of the scholarships and awards of the two funds are at **Annex B**.

Scholarship distribution

11. The number and amounts of scholarships and awards under GSF and SPSS for the 2011/12 to 2013/14 academic years are set out at **Annex C** and **Annex D** respectively. In the 2013/14 academic year, around \$157.7 million was allocated to 7 620 awardees from 37 institutions for both GSF and SPSS. The scholarship distribution of the two funds in the 2013/14 academic year is set out in details in the following paragraphs.

GSF

12. There are a total of 4 075 awardees in the 2013/14 academic year. 3 109 awardees are students from full-time locally-accredited publicly-funded programmes at degree or above levels and 966 awardees are from sub-degree programmes. Among them, the number of local and non-local recipients are 3 211 and 864 respectively. Distribution by type of scholarships and awards are summarised below:

(a) Scholarships for outstanding performance

A total of 834 scholarships were awarded to degree or above students, 438 of whom were new recipients. For sub-degree students, 555 scholarships were awarded with 398 new recipients.

(b) Targeted Scholarship Scheme

Ten new targeted scholarships were awarded to recipients from targeted countries: 4 each from the Chinese University of Hong Kong and the Hong Kong University of Science and Technology, and 2 from the University of Hong Kong. The origins of these recipients include Malaysia, Korea, Indonesia, the Philippines and India.

(c) Talent Development Scholarship

Among the 753 TDS recipients, 545 recipients are studying degree or above level programmes and 208 are from sub-degree programmes. The largest category of the nominations by the institutions is from sports and games. The breakdown by type of non-academic area is as follows:

Non-academic area	No. of recipients (%)
Sports and games	302 (40.1%)

(e.g. Rugby World Cup Asian Qualifier Championship, National Intercity Games of the People's Republic of China, etc.)	
Innovation, science and technology (e.g. International Space Settlement Design Competition, International Exhibition of Inventions of Geneva, etc.)	199 (26.4%)
Music and performing arts (e.g. International Competition for Amateur Pianists, World Ballet Competition, etc.)	146 (19.4%)
Culture, arts and design (e.g. International Student Film and Video Festival of Beijing Film Academy, The Youth Literary Award, etc.)	106 (14.1%)
Total	753 (100%)

(d) Reaching Out Award

Among the 2 080 ROA recipients, 1 831 recipients are studying degree or above level programmes and 249 are from sub-degree programmes. The largest category of the nominations received by the institutions is participation in attending courses (31%), followed by field/study trip (29%), participation in event/competition (21%), and placement/internship (19%).

ROA awardees are required to submit a reflection report and the selected reports are uploaded to the website of GSF (<http://www.edb.gov.hk/en/edu-system/postsecondary/local-higher-edu/publicly-funded-programmmes/scholarship.html>). On the destinations for ROA, a wide variety has been observed. Nearly half of the recipients choose to visit cities in Asia (including Mainland China, Taiwan and Macau) while some activities take place in Europe, America, Australasia and Africa. The duration of reaching out activities ranges from less than 2 weeks to more than 2 months and more than half of them are within 4 weeks.

(e) Endeavour Merit Award

Among the 50 EMA recipients, 36 awardees are studying degree or above programmes and 14 are from sub-degree programmes. The

breakdown by types of SEN of the recipients is as follows:

Type of SEN	No. of recipients (%)
Hearing Impairment	16 (32%)
Physical Disability	10 (20%)
Specific Learning Disabilities	5 (10%)
Visual Impairment	5 (10%)
Autism Spectrum Disorders	3 (6%)
Speech and Language Impairment	2 (4%)
Intellectual Disabilities	0 (0%)
Attention Deficit / Hyperactivity Disorder	0 (0%)
Others	9 (18%)
Total	50 (100%)

SPSS

13. There are a total of 3 545 awardees in the 2013/14 academic year. 1 234 awardees are students from full-time locally-accredited self-financing undergraduate programmes and 2 311 awardees are from sub-degree programmes. Among them, the number of local recipients and non-local recipients are 3 484 and 61 respectively. Details of the distribution of SPSS for the 2013/14 academic year by type are set out below.

(a) Outstanding Performance Scholarship

Among the 1 311 recipients of the Outstanding Performance Scholarship currently studying at all levels/years of the post-secondary programmes, 483 recipients are students from undergraduate programmes and 828 recipients are from sub-degree programmes. Among them, the number of local recipients and non-local recipients are 1 288 and 23 respectively.

(b) Best Progress Award

Among the 315 BPA recipients, 124 recipients are from undergraduate programmes and 191 recipients are sub-degree programmes. The recipients have attained notable academic improvement of at least two consecutive academic years during their post-secondary studies.

(c) Talent Development Scholarship

Among the 762 TDS recipients, 261 recipients are studying undergraduate programmes and 501 recipients are from sub-degree programmes. The largest category of the nominations by the institutions is from sports and games, accounting for about 57%. The breakdown by type of non-academic area with illustrative examples of achievements /talents and awards received in territory-wide, national or regional competitions / performances is as follows:

Non-academic area	No. of recipients (%)
Sports and games (e.g. East Asian Games, World Shuttlecock Championship, etc.)	434 (57.0%)
Music and performing arts (e.g. World Choir Games, Hong Kong Youth Cantonese Operatic Songs Singing Competition, etc.)	153 (20.1%)
Culture, arts and design (e.g. The International Meeting of Juvenile Art Évora, Society of Dyers and Colourists International Design Competition, etc.)	143 (18.8%)
Innovation, science and technology (e.g. The Institution of Engineering and Technology / The Marine Advanced Technology Education - Hong Kong Underwater Robot Challenge, Robocon Hong Kong Contest, etc.)	32 (4.2%)
Total	762 (100%)

(d) Reaching Out Award

Among the 1 107 ROA recipients, 353 recipients are studying undergraduate programmes and 754 are from sub-degree programmes. The largest category of the nominations by the institutions is participation in field/study trips (75.9%), followed by attending courses (12.0%), placement/internship (9.0%), and participation in event/competition (3.1%). ROA will enable students to participate in learning, internship or service programmes which are mainly course or placement related as well as national, regional and international events and competitions that

are conducted outside Hong Kong. Awardees are required to submit a reflection report after the reaching out activities. Illustrative reports are uploaded to the website Concourse (<http://www.cspe.edu.hk/content/Overview-Measures-Fund-SPSS-Scholarships-ROA>).

On destinations, the ROA activities cover different places and regions. Around 74% of the recipients choose to visit cities in Asia (including Mainland China, Taiwan and Macau) while some activities take place in Europe, America, Australasia and Africa. The duration of the reaching out activities ranges from less than 2 weeks to more than 2 months. Around 80% of them are within 4 weeks.

(e) Endeavour Scholarship

Among the 50 EDS recipients, 14 awardees are studying undergraduate programmes and 36 are from sub-degree programmes. The breakdown by type of SEN of the recipients is as follows:

Type of SEN	No. of recipients (%)
Hearing Impairment	12 (24%)
Specific Learning Difficulties	10 (20%)
Visual Impairment	10 (20%)
Physical Disability	7 (14%)
Autism Spectrum Disorder	5 (10%)
Speech and Language Impairment	2 (4%)
Attention Deficit / Hyperactivity Disorder	1 (2%)
Others	3 (6%)
Total	50 (100%)

Way Forward

14. Both GSF and SPSS have been instrumental in facilitating post-secondary students to accomplish their goals and recognising their achievements and significant progress. Since their implementation, the two schemes are highly regarded by students, institutions and other stakeholders in the post-secondary sector. Looking ahead, the Government will continue to monitor the implementation of and identify areas for further enhancement to these scholarships and awards.

Education Bureau
March 2015

HKSAR Government Scholarship Fund Steering Committee

Terms of Reference

1. To advise the Trustee on the overall strategy in the custody and use of the Fund;
2. To advise the Trustee on the oversight of the on-going operation of the Fund, including the scope and parameters of administering awards under the Fund and the disbursement of such awards; and
3. To review the effectiveness of the scheme, and make recommendations on the overall strategy in making use of the Fund as a vehicle to enhance the overall attractiveness of Hong Kong as a regional education hub.

Membership (as at 1 February 2015)

Name

Profession/Background ^{Note}

Chairman

Secretary for Education or representative

Members

Mr KWOK Kwok-chuen, B.B.S., J.P.	Honorary Senior Research Fellow, School of Economics and Finance, The University of Hong Kong
Mrs Katherine NGAN NG Yu-ying, JP	Vice President of May Cheong Toy Products Limited
Professor Danny WONG Shek-nam	Vice President (Academic) of Open University of Hong Kong
Ms Irene YAU Oi-yuen	Principal of Shatin Pui Ying College
Mr Roger YUEN Kwong-ming	Head of China & Taiwan, Private Banking of The Bank of East Asia Ltd

^{Note} Information is provided by members on a voluntary basis.

HKSAR Government Scholarship Fund Investment Committee

Terms of Reference

1. To advise the Trustee on the formulation of policies for the investment of the Fund;
2. To make recommendations in respect of the monitoring of the investment of the Fund;
3. To advise the Trustee on the appointment of fund managers, as appropriate, to handle the investment of the Fund; and
4. To submit its advice and recommendations to the Steering Committee for information.

Membership (as at 1 February 2015)

<u>Name</u>	<u>Profession/Background</u> ^{Note}
<u>Chairman</u>	
Secretary for Education or representative	
<u>Members</u>	
Mr CHUNG Shui-ming, G.B.S., J.P.	Independent Non-Executive Director, China Construction Bank Corporation
Mr KWOK Kwok-chuen, B.B.S., J.P.	Honorary Senior Research Fellow, School of Economics and Finance, The University of Hong Kong
Ms Helen ZEE	Deputy Chief Executive & Managing Director, Haitong International Capital Limited
Permanent Secretary for Education or representative	
Director of Accounting Services or representative	

^{Note} Information is provided by members on a voluntary basis.

Self-financing Post-secondary Education Fund Steering Committee

Terms of Reference

The Steering Committee advises the Secretary for Education on:

1. the overall strategy for making use of the Self-financing Post-secondary Education Fund (the Fund) as a vehicle to enhance the quality of self-financing post-secondary education;
2. the strategy, scope and parameters of the Self-financing Post-secondary Scholarship Scheme, Quality Enhancement Support Scheme and Quality Assurance Support Scheme in support of the development of the self-financing post-secondary education sector in Hong Kong; and
3. any other matters that may be referred to the Committee by the Education Bureau concerning the policy and administration of the Fund.

In discharging its functions, the Steering Committee may set up sub-committees, conduct studies, engage professional services and co-opt members as and when necessary.

Membership (as at 1 February 2015)

<u>Name</u>	<u>Profession/Background</u> ^{Note}
<u>Chairman</u>	
Mr Tim LUI Tim-leung, B.B.S., J.P.	Senior Advisor, PricewaterhouseCoopers Limited
<u>Members</u>	
Mr Albert CHOW Hing-pong	Director of Qualifications, The Hong Kong Institution of Engineers
Dr Maggie KOONG May-kay, B.B.S.	Head of Academy, Victoria Shanghai Academy
Professor TAM Kar-yan	Associate Provost and Dean of Students, The Hong Kong University of Science and Technology
Mr Wilfred WONG Kam-pui	Director of Resolutions
Ms Shirley WONG She-lai, M.H.	School Supervisor, St. Clare's Girls' School
Ms Helen ZEE	Deputy Chief Executive & Managing Director, Haitong International Capital Limited
Principal Assistant Secretary (Further Education)	

^{Note} Information is provided by members on a voluntary basis.

Self-financing Post-secondary Education Fund Investment Committee

Terms of Reference

The terms of reference of Investment Committee are as follows:

1. To advise the Trustee on the formulation of policies for the investment of the Fund;
2. To make recommendations in respect of the monitoring of the investment of the Fund; and
3. To advise on the appointment of fund managers to handle the investment of the Fund.

In discharging its functions, the Investment Committee may set up sub-committees, conduct studies, engage professional services and co-opt members as and when necessary.

Membership (as at 1 February 2015)

<u>Name</u>	<u>Profession/Background</u> ^{Note}
<u>Chairman</u>	
Secretary for Education or representative	
<u>Members</u>	
Mr CHUNG Shui-ming, G.B.S., J.P.	Independent Non-Executive Director, China Construction Bank Corporation
Mr KWOK Kwok-chuen, B.B.S., J.P.	Honorary Senior Research Fellow, School of Economics and Finance, The University of Hong Kong
Ms Helen ZEE	Deputy Chief Executive & Managing Director, Haitong International Capital Limited
Permanent Secretary for Education or representative	
Director of Accounting Services or representative	

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HKSAR Government Scholarship Fund

- (a) ***Scholarship for Outstanding Performance*** - Scholarships for students with outstanding achievements. For degree or above levels, the scholarships for local and non-local students are \$40,000 and \$80,000 each per year respectively. The scholarship for sub-degree students is between \$20,000 and \$30,000 each per year.
- (b) ***Talent Development Scholarship*** - Scholarships to give recognition to students who have demonstrated achievements or talent in non-academic areas and provide support for these students to further develop their talent and potential. The scholarship is set at \$10,000 for students enrolled in full-time publicly-funded programmes at both degree or above and sub-degree levels, irrespective of whether they are local or non-local students.
- (c) ***Reaching Out Award*** - Awards to support meritorious students who are nominated by institutions to participate in an event/competition, partake in an internship or a placement, take part in a field/study trip or attend a course which is conducted outside Hong Kong and organised/endorsed by institutions. The award is set at \$10,000 for students enrolled in full-time publicly-funded programmes at both degree or above and sub-degree levels, irrespective of whether they are local or non-local students.
- (d) ***Endeavour Merit Award*** – Awards to give recognition to deserving post-secondary students with SEN in the pursuit of excellence in academic and other areas. The award is set at \$10,000 for local and non-local students pursuing publicly-funded degree or above and sub-degree level programmes.
- (e) ***Targeted Scholarship*** – Scholarships offered to up to ten first-year non-local full-time students from the Association of Southeast Asian Nations (ASEAN) countries, India and Korea who are enrolled in publicly-funded degree programmes in Hong Kong. The scholarship covers the tuition fee of the students, subject to a ceiling of \$120,000.

Self-financing Post-secondary Scholarship Scheme

- (a) ***Outstanding Performance Scholarship*** - Scholarships for students with outstanding achievements. For bachelor's and top-up degree students, the scholarships for local and non-local students are \$40,000 and \$80,000 each per year respectively. For sub-degree students, the scholarship for local or non-local student is \$30,000 each per year.
- (b) ***Best Progress Award*** - Awards to encourage and recognise students with significant progress and improvement. The award is set at \$10,000 for a bachelor's degree or sub-degree student, irrespective of whether they are local or non-local students.
- (c) ***Talent Development Scholarship*** - Scholarships to give recognition to students who have demonstrated achievements or talent in non-academic areas and provide support for these students to further develop their talent and potential. The scholarship is set at \$10,000 for both bachelor's degree and sub-degree students, irrespective of whether they are local or non-local students.
- (d) ***Reaching Out Award*** - Awards to support meritorious students who are nominated by institutions to participate in learning, internship or service programmes, as well as national, regional and international events and competitions that are conducted outside Hong Kong and organised/endorsed by institutions. The award is set at \$10,000 for both bachelor's degree and sub-degree students, irrespective of whether they are local or non-local students.
- (e) ***Endeavour Scholarship*** – Awards to give recognition to deserving post-secondary students with SEN in the pursuit of excellence in academic and other areas. The award is set at \$10,000 for both bachelor's degree and sub-degree students, irrespective of whether they are local or non-local students.

**Number and Amount of Scholarships and Awards
under HKSAR Government Scholarship Fund
(2011/12 - 2013/14 Academic Years)**

Scholarships / Awards	Award Amount	Academic Year					
		2011/12		2012/13		2013/14	
		No. of Scholarships / Awards	Amount (\$million)	No. of Scholarships / Awards	Amount (\$million)	No. of Scholarships / Awards	Amount (\$million)
Scholarship for Outstanding Performance	\$20,000 to \$80,000 *	657	32.1	1 131	50.6	1 389	59.4
Talent Development Scholarship	\$10,000	-	-	708	7.1	753	7.5
Reaching Out Award	\$10,000	-	-	1 174	11.7	2 080	20.8
Endeavour Merit Award	\$10,000	-	-	-	-	50	0.5
Targeted Scholarship	Covers the tuition fees#	-	-	10	1.0	19	2.1
Total		657	32.1	3 023	70.5	4 291	90.4

Notes:

Individual figures may not add up to the total due to rounding.

"*" The respective amounts for local and non-local degree or above students are \$40,000 and \$80,000 each per year. For sub-degree students, the scholarship for local or non-local student is between \$20,000 and \$30,000 each per year.

"#" Subject to a ceiling of \$120,000.

"-" Figures are "not applicable". The Talent Development Scholarship and Reaching Out Award have been introduced since the 2012/13 academic year. The Endeavour Merit Award has been established since the 2013/14 academic year.

**Number and Amount of Scholarships and Awards
under Self-financing Post-secondary Scholarship Scheme
(2011/12 - 2013/14 Academic Years)**

Scholarships / Awards	Award Amount	Academic Year					
		2011/12		2012/13		2013/14	
		No. of Scholarships / Awards	Amount (\$million)	No. of Scholarships / Awards	Amount (\$million)	No. of Scholarships / Awards	Amount (\$million)
Outstanding Performance Scholarship	\$30,000 to \$80,000 *	1 000	32.9	1 247	42.4	1 311	45.0
Best Progress Award	\$10,000	290	2.9	333	3.3	315	3.2
Talent Development Scholarship	\$10,000	-	-	466	4.7	762	7.6
Reaching Out Award	\$10,000	-	-	553	5.5	1 107	11.1
Endeavour Scholarship	\$10,000	-	-	-	-	50	0.5
Total		1 290	35.8	2 599	56.0	3 545	67.3

Notes:

Individual figures may not add up to the total due to rounding.

"*" The respective amounts for local and non-local undergraduate students are \$40,000 and \$80,000 each per year. For sub-degree students, the scholarship for local or non-local student is \$30,000 each per year.

"-" Figures are "not applicable". The Talent Development Scholarship and Reaching Out Award have been introduced since the 2012/13 academic year. The Endeavour Scholarship has been established since the 2013/14 academic year.