

LEGISLATIVE COUNCIL BRIEF

FINE-TUNING THE MEDIUM OF INSTRUCTION FOR SECONDARY SCHOOLS

INTRODUCTION

At the meeting of the Executive Council on 26 May 2009, the Council ADVISED and the Chief Executive ORDERED that -

- (a) the Administration should implement the proposed fine-tuned Medium of Instruction (MOI) arrangements for secondary schools as set out under paragraphs 6 to 9 below with effect from September 2010, starting from the Secondary (S)1 level and progressing each year to a higher level of the junior secondary forms;
- (b) the Administration should earmark resources to step up focused inspections, to provide the necessary training and professional support for content subject teachers who may be required to switch from the teaching in Chinese to English, and to commission a large-scale longitudinal study with a view to developing effective teaching resources (paragraphs 12 to 15 below); and
- (c) in tandem, the Administration should earmark resources to enhance the learning and teaching of English in primary schools so as to build a solid English foundation for our students (paragraphs 16 and 17 below).

JUSTIFICATIONS

The Need for Fine-tuning the MOI and Objectives

2. In public discussion over the policy of mother-tongue teaching throughout the years, it is recognized that the use of English has a particular cultural, economic and social importance in Hong Kong. While most students learn in their mother tongue in primary schools, teaching and learning may be conducted in English to a larger extent at the senior secondary and post-secondary levels in Hong Kong. In its *Report on Review of Medium of Instruction for Secondary Schools and Secondary School Places Allocation* published in December 2005 (the *Report*), the Education Commission (EC) recommended and the Government accepted the revised MOI arrangements for secondary schools (to be effective from September 2010) which aim to consolidate the direction of mother-tongue teaching policy and to maintain the current bifurcation approach (i.e. secondary schools are streamed as schools using English (EMI) or Chinese (CMI) as the MOI at junior secondary levels). However, more and more stakeholders have raised the following concerns over the policy -

- (a) Although mother-tongue teaching can remove the language barriers for students, effectively stimulate their interest in learning and encourage greater involvement in the learning process, students learning in their mother tongue have limited exposure to English during lesson time and this may affect their bridging over from junior secondary levels to senior secondary and/or post-secondary levels at which EMI teaching may be adopted to a comparatively greater extent.
- (b) The bifurcation of schools into CMI schools and EMI schools may not fully meet the needs of individual students.
- (c) The labeling of secondary schools as “CMI schools” and “EMI schools” has adversely affected schools and students alike, creating undue pressure on the teachers and students of CMI schools and dampening the students’ motivation to learn English.
- (d) The review mechanism under which existing EMI schools failing to meet the “student ability” criterion¹ will become CMI schools

¹ An EMI school should have a critical mass of at least 85% of its S1 intake being among the top 40% of students in the cohort as recommended in the *Report*.

will cause consequential destabilizing effect on the development of schools.

3. At the same time, Hong Kong needs to enhance its position as a modern international city and a global financial centre for sustained economic growth. As we are entering a new era of globalization, our education system, including the curriculum and pedagogies, has to progress in tandem. To learn how to learn, our students must master the skills to collate information, identify and analyze the issues involved, and articulate their opinions. Against all these considerations, we must equip our students with the requisite proficiency in both Chinese and English.

4. The success of acquiring a high proficiency in a foreign language hinges upon two important elements, namely, motivation and a language-rich environment. Given the ethnic homogeneity of the Hong Kong society, the use of Chinese prevails in almost every aspect of our life and there is a general lack of an English-rich environment. As a result, it is natural that our students may not have adequate exposure to English outside schools. Seen in this light, schools provide a very suitable environment to expose our students to this foreign language and we hope to be able to enhance their exposure in this regard.

5. Against the above background, we propose to fine-tune the MOI policy for secondary schools recommended by the EC and accepted by the Government back in December 2005, with a view to allowing secondary schools to devise the appropriate school-based MOI arrangements with regard to students' learning ability, interests and aspirations as well as circumstances of individual schools including teachers' capability and readiness. Students, as a result, would have more opportunities to get exposed to and use English in schools to facilitate their transition to senior secondary and/or post-secondary education.

Overriding Principles and Proposed Framework of Fine-tuning

6. Our aim is not to overturn the MOI policy recommended by the EC. In fact, we see no case for doing so since the policy has laid a solid foundation for mother-tongue teaching, which has been well recognized as effective in facilitating students' learning of content subjects. On the contrary, we see the need to continue upholding the importance of Chinese language (Cantonese and Putonghua), to support teachers and schools in

the delivery of quality learning and teaching of the language, and to facilitate the steady development of mother-tongue teaching. As part and parcel of our language policy, our aim is to enable our students to master written English and Chinese as well as to speak fluent English, Cantonese and Putonghua to prepare for future challenges. This notwithstanding, what we hope to achieve is to enable each and every student of all secondary schools, irrespective of whether they are CMI schools or EMI schools, to have the motivation and be given more opportunities to use English to learn subject knowledge in a progressive manner that best suit their learning needs and abilities. The proposed fine-tuning is premised on the following six principles -

- (a) The first and foremost consideration is to safeguard students' learning effectiveness.
- (b) We should uphold mother-tongue teaching and enhance proficiency in Chinese and English.
- (c) We should continue to uphold the three prescribed criteria of student ability², teacher capability³ and support measures for schools in using English as the MOI as recommended in the *Report*.
- (d) Schools should be allowed to exercise professional judgment under the prescribed criteria and adopt the appropriate MOI arrangements to address students' learning needs with regard to individual school circumstances.
- (e) Schools should devise a holistic MOI strategy as part of the whole-school language policy and enhance the transparency of information on their MOI arrangements so as to facilitate parents in making informed school choices.

² Students need to have strong learning motivation and ability to overcome the language barriers of learning through a second language. A research study in 2004 indicates that at most 40% of Secondary (S) 1 students in Hong Kong are able to learn through English. That said, in anticipation of improvement in the English proficiency of our primary students through our English enhancement efforts (as detailed in paragraphs 16 and 17), we do not rule out the possibility to review the student ability criterion later.

³ The basic English language ability requirement for teachers teaching content subjects in English is Grade C or above in English Language (Syllabus B) of the Hong Kong Certificate of Education Examination (HKCEE) (or Level 3 or above in English Language of the HKCEE 2007 and thereafter), or other equivalent qualifications (e.g. Level 6 or above in IELTS).

- (f) The Education Bureau (EDB) should monitor the learning effectiveness of students under individual schools' MOI arrangements in accordance with the School Development and Accountability Framework.

7. By following the three prescribed criteria recommended in the *Report*, the proposed fine-tuned MOI framework is as follows -

- (a) There will no longer be pure bifurcation of schools into CMI and EMI schools. Should the school decide to devise its MOI strategy on the basis of "by class" arrangement, the school will have to take into account whether they could satisfy the "student ability" criterion, i.e. the average proportion of S1 intake of a school admitted to a class belonging to the "top 40%" group in the previous two years under a six-year review cycle⁴ reaches 85% of the size of a class (i.e. 29 out of 34, the latter being the allocation class size in 2010), the school will be given full discretion to determine the MOI arrangements in the class concerned. The school could choose the most appropriate MOI arrangements in the form of "by class", "by group", "by subject" and "by session" arrangements, or a combination of the above forms, having regard to its own circumstances, including those of the needs of students, the capability and readiness of their teachers as well as school-based support measures, and in consultation with its stakeholders. In so doing, there will be a spectrum of MOI arrangements across schools, ranging from total CMI at one end, CMI or EMI in different subjects, and EMI in full immersion at the other end.
- (b) For other students who will mainly learn content subjects in their mother tongue, we will to enhance their English learning environment by increasing the percentage of the total lesson time

⁴ We will put in place a six-year review mechanism is proposed to be introduced, taking into account the need to facilitate schools in planning ahead their school-based MOI arrangements and the fact that there are possible changes of S1 intake across the years. In line with the recommendation in the *Report*, we will provide schools with information on their S1 intake, according to the Secondary School Places Allocation results in 2008 and 2009, for planning the school-based MOI arrangements for the first six-year cycle starting from September 2010.

(excluding the lesson time for the English Language subject) allowed for extended learning activities (ELA) in English from the original 15%, 20% and 25% for S1, S2 and S3 respectively as recommended in the *Report* to a uniform proportion of 25% for each of these three levels. With this increase in ELA time, and taking together the lesson time of the English Language subject which normally makes up about 21% of the total lesson time, the English learning environment of schools will be significantly enhanced.

- (c) In order to provide students with more motivation to learn English in content subjects and to facilitate them to progress to senior secondary levels at which EMI teaching may be adopted to a comparatively greater extent, we will allow schools to transform the above-mentioned 25% ELA time into the adoption of EMI in individual subjects (up to a maximum of two subjects). In considering whether such “by-subject” arrangement should be adopted, they should take into account factors such as –
- (i) whether this arrangement would fit into the overall curriculum plan and ensure consistency and integrity of the whole school curriculum throughout the secondary levels;
 - (ii) whether it meets the students’ needs, interests and learning progress;
 - (iii) the circumstances of the schools, including teachers’ capability and readiness; and
 - (iv) whether the schools have laid down clear parameters for self-evaluation and assessment to ensure that students’ learning effectiveness could be enhanced through the creation of an interactive and quality classroom environment by adopting this arrangement.

Under no circumstances should the overriding principle of ensuring students’ learning effectiveness be compromised. We will put in place a mechanism to monitor and support schools in this regard and the details are outlined in paragraphs 11 to 14 below.

Diversified MOI Arrangements

8. Under the above-mentioned proposed framework, all schools would basically be given discretion to adopt CMI for all content subjects and use not more than 25% of the total lesson time (excluding English language) for ELA, or should they meet the guiding principles in paragraph 7(c) above, adopt CMI for some content subjects and adopt EMI in certain key learning areas/subjects provided that not more than 25% of the total lesson time (excluding English language) or not more than two content subjects will be conducted in English. As for those schools which have a critical mass of students meeting the “student ability” criteria as mentioned in paragraph 7(a) above, they would be given discretion to adopt EMI for all content subjects or to adopt CMI for some content subjects and use EMI in more than two content subjects or in more than 25% of the total lesson time (excluding English language).

9. It is worth-noting that under the so-called “by class” arrangement as mentioned in paragraph 7(a) above, it does not call for a simple segregation of classes using either CMI or EMI within a school as envisaged by the EC in 2005. We are proposing to give schools more flexibility in using EMI for one or more subjects for different classes. Schools with a critical mass of students meeting the criteria for EMI teaching may make reference to their own circumstances and students’ needs to put in place the most appropriate MOI arrangements in a professional manner. In other words, the choice and number of subjects taught in EMI would likely vary between classes within individual schools as well as among schools. This is particularly so when we are also encouraging schools to strengthen ELA for classes adopting mother-tongue teaching. To safeguard students’ interests and ensure teaching and learning effectiveness, schools’ professional judgment is specifically called for in this regard. Against this, we would impress upon schools the need to develop a coherent school-based MOI strategy as part and parcel of their whole-school language policy.

Ensuring Proper Delivery of the Fine-tuning Arrangements

Transparency of Information

10. Under the proposed fine-tuning arrangements, schools would be

required to increase the transparency of information on their MOI arrangements, and to set up mechanisms, and to explain to parents, on the streaming of students under the “by class”, “by group” and “by subject” arrangements and any subsequent transfers as individual students move up to S2 and S3. Such arrangements, and any criteria for student allocation, should be spelled out in the school development plans. Separately, schools will have to report to EDB and to keep parents and the public informed of their choice of MOI and the conduct of ELA for teaching individual content subjects.

Monitoring

11. Separately, schools should 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 school development plans, which will 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.

12. In terms of monitoring, we will continue to conduct external review and step up focused inspections under the existing mechanism to help schools, in particular those which intend to adopt the “by-subject” arrangement, review the effectiveness of their MOI arrangements. We will conduct focused inspections to about 70 schools in each of the three consecutive school years starting from September 2010. We plan to set up an advisory panel drawn from the education sector to consider observations and findings made at the focused inspections and make recommendations to EDB on follow-up actions with individual schools, which may include modifications or re-planning of the relevant MOI arrangements when necessary. In case of schools’ non-compliance (such as where schools implement MOI arrangements which do not meet the prescribed criteria without EDB’s consent), we would consider issuing warning letters to the schools concerned and make it known to the public, and take appropriate

follow-up actions depending on the circumstances of the cases concerned.

Professional Support for Teachers

13. To enhance the quality of learning and teaching in the classrooms, we propose to provide the necessary training and professional support for content subject teachers who may be required to switch their MOI from CMI to EMI in order to improve their teaching strategies. Supply teachers will be made available to encourage them to participate in relevant professional development courses. Through professional upgrading, they will be able to develop the sense, knowledge and know-how to carry out collaboration and cooperation in promoting English across-the-curriculum. Learning and teaching resources would be further produced for modules/topics in Key Learning Areas where ELA could be effectively used to provide useful exposure to English. The on-site support to school-based curriculum development would provide more guidance on whole-school language policy planning and language across the curriculum. School networks and sharing of good practices would be facilitated as well through organization of sharing sessions for schools at half-yearly intervals.

14. With diversification of the MOI arrangements, we propose that another longitudinal study be commissioned, in addition to the current study on ELA⁵, to analyze the effectiveness of and collect data on different teaching modes. This will be a large-scale study to develop effective teaching resources and provide professional support to about 200 schools and their teachers.

15. We envisage that a total of about \$640 million will be set aside during the five-year period from 2010 to 2014 for the support measures set out under paragraphs 13 and 14 above. Of the \$640 million, the estimated cost of the longitudinal study is about \$50 million. The remaining \$590 million will be used mainly to provide in-service professional development courses for non-language teachers switching from CMI to EMI and recruit supply teachers to take up the teaching duties while the former are receiving training.

⁵ The current study is of a relatively smaller scale, involving some 30 secondary schools only.

Improving the English Proficiency of Primary School Students

16. We believe that it is important to enhance the teaching and learning of English in primary schools so as to build a solid foundation for our students. Apart from implementing a number of ongoing and new support measures with a view to enhancing the English proficiency of primary school students, we plan to introduce the following support measures to further enhance English learning and teaching at primary level -

- (a) in order to attract talented candidates for the teaching profession, we propose to establish 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;
- (b) for serving primary school teachers not yet attaining the qualifications set out by the Standing Committee on Language Education and Research (SCOLAR)⁶, we propose to offer courses on pedagogy and subject knowledge for them. Supply teachers will be provided to enable schools to release them for the training;
- (c) we propose to re-deploy necessary resources for provision to primary schools in order to facilitate them in adopting school-based enhancement measures in enriching their English language environment; and
- (d) we propose to form a network of voluntary professionals to conduct English activities with students.

17. The scholarship as mentioned in paragraph 16(a) above is estimated to incur an annual cost of \$14 million on a recurrent basis, which will provide scholarships to about 50 prospective English teachers each year. As regards the other measures as mentioned in paragraph 16(b)-(d)

⁶ A language teacher should hold a Bachelor of Education (BEd) degree majoring in the relevant language subject; or both a first degree majoring in the relevant language subject and a Postgraduate Diploma or Certificate in Education (PGDE or PCEd) majoring in the same language subject.

above, we envisage that around \$310 million will be incurred during the five-year period from 2010 to 2014.

Implementation Date

18. The fine-tuned MOI arrangements for secondary schools will be implemented starting from September 2010. The arrangements will start with S1 level and progress each year to a higher level of the junior secondary forms.

IMPLICATIONS OF THE PROPOSAL

19. The proposal has financial, economic and sustainability implications as set out in the Annex . The proposal is in conformity with the Basic Law, including the provisions concerning human rights. It has no productivity or environmental implications. Civil service implications, if any, will be absorbed within the existing provision of EDB.

PUBLIC CONSULTATION

20. Over the past year, we have carried out extensive consultation with various stakeholders including school principals, teachers, school sponsoring bodies, major education bodies including school councils and teachers' associations, students, parents, the Education Commission as well as the Legislative and District Councils.

PUBLICITY

21. We will promulgate the new arrangement among the schools through a school circular and make information booklets and publicity leaflets available to schools and the public.

BACKGROUND

22. The Government has gone a long way, since the early 1980s, in promoting the use of mother tongue as the MOI in our secondary schools. Under the policy framework embodied in the *Medium of Instruction*

Guidance for Secondary Schools (Guidance) published in 1997, only secondary schools which fulfilled three prescribed criteria – students’ ability to learn through English, teachers’ capability to teach through English, and adequate support strategies/measures to switch from CMI to EMI teaching – are allowed to teach in English. The majority of secondary schools use CMI at junior secondary levels, but are given flexibility to use English for certain subjects in some classes at senior secondary levels, based on their own assessment of the three criteria.

23. In the *Report*, the EC upheld the policy direction of the *Guidance* and proposed specific standards for the three prescribed criteria of student ability, teacher capability and support measures and a review mechanism. The *Report* also stressed that in implementing mother-tongue teaching, it was essential to ensure that students would also be proficient in English, and proposed specific measures in this regard. The Government accepted the recommendations of the *Report* and agreed that the revised MOI arrangements for secondary schools should be implemented with effect from September 2010.

OTHERS

24. Enquiries on this brief may be directed to Ms L B Ip, Principal Assistant Secretary for Education (Education Commission and Planning), at 2892 6621.

Education Bureau
May 2009

Implications of the Proposal

Financial Implications

We will to earmark one-off funding of \$980 million from 2009-10 to 2013-14, broken down as follows-

- (a) \$590 million to provide the necessary training and professional support for secondary content subject teachers who are switching from the teaching in Chinese to English (from 2009-10 to 2013-14);
- (b) \$310 million to enhance learning and teaching of English in primary schools (from 2009-10 to 2013-14);
- (c) \$50 million to commission a large-scale longitudinal study in secondary schools with a view to developing effective teaching resources (from 2009-10 to 2011-12); and
- (d) \$30 million to step up focused inspections at secondary schools for effective monitoring of their school-based MOI arrangements (from 2010-11 to 2013-14).

In addition, we propose to incur recurrent funding of \$14 million per annum to establish a scholarship for qualified school graduates planning to pursue a relevant degree and teacher training in English.

2. The funding mentioned in paragraph 1 above will be absorbed by the Secretary for Education's Operating Expenditure Envelope and the Language Fund where appropriate.

Economic Implications

3. From a macro perspective, the MOI Fine-tuning should help raise the efficacy of Hong Kong's secondary education and hence be more conducive to nurturing talents capable of meeting the needs and challenges of a globalised and knowledge-based economy. A strong

pool of human resources is a key to furthering Hong Kong's development as an international business and financial hub.

Sustainability Implications

4. The proposals would help enhance the quality of teaching and learning, create more room and space for whole-person development of students and provide parents and schools with more choices and flexibility. The proposal is in line with the sustainability principle of enabling individuals to fulfill their potential by providing universal access to adequate and appropriate education opportunities.