

## The Long March to Bilingual and Trilingualism: Language Policy in Hong Kong Education Since the Handover

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Since the handover, policymakers in Hong Kong have faced the daunting task of determining the educational roles of two major international languages (*Putonghua* and English), as well as a vibrant local language (Cantonese), which is the mother tongue of around 90% of the city's predominantly Chinese population. Their response to this unprecedented challenge has been to set the ambitious goal of developing students' ability to read and write Chinese and English and to speak Cantonese, *Putonghua*, and English. At the same time, however, they are pursuing policies that in some respects run counter to this commendable if ill-defined aim. This article examines the background to and rationale for the promotion of bilingual and trilingualism and reviews recent research into the government's major language-in-education initiatives since 1997, namely, the adoption of a compulsory mother-tongue policy at junior secondary level, the recent fine-tuning of this controversial policy, and the use of *Putonghua* as the medium of instruction in Chinese subjects at primary and secondary levels.

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Since the transfer of sovereignty in 1997, policymakers in Hong Kong have faced the unenviable challenge of determining the educational roles of three languages that are vital in different ways to the city's political and economic interests and its citizens' social and cultural well-being. This challenge, which is unparalleled in the annals of post-colonial language planning, has entailed balancing the claims of the world's two leading languages, in terms of size and significance (*Putonghua* and English), together with those of a vibrant indigenous language (Cantonese), which is the mother tongue of the vast majority of the population of the Special Administrative Region (SAR).<sup>1</sup> This article examines governmental and institutional policymakers' responses to this complex task in the past 16 years and reviews recent studies of the issues and problems that have flowed from their decisions and actions.

These investigations build on and extend the voluminous body of research that was conducted in the last two decades of British rule, much of which explored the pedagogical problems that accompanied the shift from elite to mass English-medium secondary education during the 1970s. The emergence

of these problems, which, as we shall see, are far from being resolved, can be tracked in a series of widely cited official reports (e.g., Education Commission, 1990; Hong Kong Government, 1974; Llewellyn, 1982) and edited volumes (e.g., Cheng, 1979; Lord & Cheng, 1987; Luke, 1992; Pennington, 1998) that appeared at regular intervals during this critical period in the city's political and economic development. The proposals and perspectives in these publications form the essential backdrop to the present review, which focuses on studies of language-in-education policies and practices published since the mid-2000s. Reviews of research spanning the late colonial and early post-colonial periods can be found in articles by Poon (2009a) and Tse (2009) on English- and Chinese-language education, respectively. Poon (2010) also provides a comprehensive, education-oriented account of language policy and planning in Hong Kong in the past two decades.

This article is divided into five main sections. The first section sets the scene for the review by discussing medium-of-instruction (MOI) policies and practices at primary, secondary, and tertiary levels in late colonial Hong Kong. The second section examines the background to and rationale for the SAR government's fundamental policy goal in the sphere of language education, namely, the wish to promote biliteracy and trilingualism. The next three sections review the administration's major language-in-education initiatives since the handover: the adoption of a compulsory mother-tongue policy at junior secondary level, the recent fine-tuning of this controversial policy, and the use of *Putonghua* as the MOI in Chinese subjects at primary and secondary levels.

## THE COLONIAL LINGUISTIC INHERITANCE

### Medium-of-Instruction Policies and Practices in Late Colonial Hong Kong

Like their counterparts during the era of large-scale decolonization in the 1950s and 1960s, policymakers in the SAR inherited an education system in which the colonial language predominated at its crucial higher levels and a society in which proficiency in the language was a prerequisite for employment in the upper echelons of the public sector and the business and professional worlds (Bolton, 2011; Lin, 2005). The ascendancy of English in higher education, professional training, and white-collar employment during the colonial era (Lin, 1996) lies behind many of the MOI-related issues that have been the foci of study and debate in recent decades; and since the language's gatekeeping role in these domains has been reinforced rather than reduced since the handover (Evans, 2010a), these questions continue to preoccupy policymakers and researchers.

It should be emphasized that the use of English as the principal MOI in Hong Kong higher education is largely uncontroversial as policy (Choi, 2010), though often problematic in practice (Evans & Green, 2007). As in other post-colonial polities, the significance of the MOI at tertiary level lies in its often baleful influence on policies and practices at secondary level: if competence in English is a key determinant of admission to higher education and thereafter access to professional employment, schools will inevitably be pressured by parents

to teach in English since it is taken as axiomatic that high levels of proficiency in the second language (L2) are more likely to result from its use as the MOI for content subjects than from its study solely as a language subject (Li, 2002). In the last two decades of colonial rule, parental pressure together with the government's politically expedient policy of *laissez-faire* encouraged most secondary schools to adopt English as their official MOI for the entire seven-year course of studies (years 7–13). This was despite the fact, of which the colonial administration was fully cognizant (Evans, 2011a), that most students possessed neither the language proficiency nor the academic aptitude required to study effectively in what was at this time a rather remote L2 (Education Commission, 1990). Teachers' solution to this predicament—having to provide a form of education that parents wanted but their offspring generally could not manage—was entirely understandable: to use the shared mother tongue to present and explicate the content of English-language teaching materials and to humanize what would otherwise have been an unpalatably formal atmosphere in the classroom (Johnson & Lee, 1987). Students were still required to complete assignments and take examinations in English, an obligation that inevitably contributed to the much-deprecated practice of rote learning (Llewellyn, 1982), but this was a price they were prepared to pay for the indispensable, though hardly exclusive, label of *English-medium graduate*.

The transformation of the once-elite English-medium secondary stream and the concomitant stagnation of its Chinese-medium counterpart in the late colonial period stimulated considerable scholarly interest in issues relating to learning processes and outcomes in nominally English-medium classrooms. Given the manifold problems uncovered by this research, this transformation raised important questions about the relative merits of English and Chinese as MOIs, the optimum point at which English-medium instruction should be introduced, and, especially contentious, whether access to such teaching should be restricted to those judged to possess the requisite proficiency and ability. As we shall see, these issues have occupied a prominent place on research and policy agendas since the handover and will continue to do so as long as English remains the main MOI at the apex of the education system.

Much less prominent on these agendas has been the issue of the MOI at the base of the system, which is presumably because the long-standing use of the mother tongue at primary level is wholly uncontroversial as policy and largely unproblematic in practice. Although the colonial regime is often criticized for neglecting mother-tongue education (Lin & Man, 2009), what tends to be overlooked is its success in promoting Chinese-medium teaching at primary level. In Hong Kong, such instruction has generally entailed the use of Cantonese and written Chinese with traditional rather than simplified characters. The provision of mother-tongue primary education is notable because Hong Kong is the only location in East Asia (including China) and Southeast Asia where a local rather than a national language functions as the MOI (Kirkpatrick, 2011). It is also worth noting that Hong Kong has traditionally placed greater emphasis on mother-tongue teaching than many other post-colonial societies. For example, schools in most former British colonies in Africa

switch to English-medium instruction at upper primary level after using an indigenous language (though not necessarily the mother tongue) in the first three or four years. In some cases (e.g., Zambia), teaching in English commences in the first year (Ferguson, 2006). Indeed, even after the recent fine-tuning of the mother-tongue policy, Hong Kong's education system arguably puts greater stress on mother-tongue education than that of Tanzania, which is often upheld as a model of enlightened language policymaking (Evans, 2011a).

### **Historical Perspectives on the Medium of Instruction in Hong Kong**

A conspicuous lacuna in the literature inspired by the rise of English-medium schooling in late colonial Hong Kong was a historical perspective on issues relating to MOI policy and practice. The need for such a perspective was highlighted in the final year of colonial rule by the educational historian Anthony Sweeting (1997), who criticized applied linguists in Hong Kong for their "ahistorical, a priori approach" (p. 35) to the study of language questions. One consequence of the "vanishing sense of history" (p. 36) in the local applied linguistics community was that potentially illuminating insights into contemporary issues were ignored or rejected, the implication being that if policymakers had capitalized on the knowledge acquired from more than a century of English-medium teaching, some of the problems in the area of language in education might have been alleviated or perhaps even averted.

While a sense of history has yet to materialize—the antecedents of current controversies continuing to go unnoticed in the literature—there has nevertheless been a modest stirring of interest in the historical dimension of language policy in the past decade, although as Bolton (2011) points out, a detailed narrative history remains to be written, with the period between the late 1880s and the late 1970s virtually uncharted.<sup>2</sup> Sweeting himself—in collaboration with a fellow historian (Sweeting & Vickers, 2007)—ventured into the field of applied linguistics with a penetrating critique of what they saw as Pennycook's (1998) highly generalized account of the nature and purposes of colonial language policy in Hong Kong, lamenting his excessive reliance on secondary sources and selective use of conveniently accessible primary sources. These limitations, in Sweeting and Vickers's (2007) view, pointed to the need for the history of colonial education—itsself the "dark continent of imperial historiography" (p. 1)—to be reconstructed from the bottom up through tightly focused archival research into policy, schools, and curricula in particular contexts. Coincidentally, several article-length studies of this nature have appeared since Sweeting and Vickers issued this call. These include reconstructions from primary sources such as Colonial Office correspondence and contemporary newspapers of the introduction of English teaching on Hong Kong Island in the 1840s and 1850s (Evans, 2008a), the establishment of the government's flagship English-medium school in the 1860s (Evans, 2008b), and the formulation of MOI policy in the 1870s and 1880s (Evans, 2008c). These articles, together with recent studies linking past and present at secondary (Evans, 2011a) and tertiary levels (Lin & Man, 2011), reveal that issues that have preoccupied policymakers since the late 1970s, notably the apparently deleterious influence of mixed-mode instruction

on students' language development, have been a source of concern for more than a century.

Whether this emerging strand of research will be extended in the years ahead will depend on the priorities of funding bodies and the predilections of individual investigators. As we shall see, an already crowded research agenda has expanded since the handover with the inclusion of questions concerning the teaching of *Putonghua* and the fine-tuning of MOI policy, and thus researchers will rightly wish to concentrate on understanding the present rather than on unearthing the past. However, as Sweeting (1997) noted, the past contains valuable lessons for the present. As policymakers press ahead with the fine-tuning initiative, which will pose essentially the same questions as those that confronted their counterparts in both the late 19th and late 20th centuries, they would do well to heed them.

## ONE COUNTRY, TWO SYSTEMS, THREE LANGUAGES

### Promoting Biliteracy and Trilingualism

The unique one country, two systems principle established by China and Britain in 1984 permits Hong Kong a high degree of autonomy in managing its affairs, including those relating to education. The SAR's status is embodied in its constitution, the Basic Law, which provides no evidence of the Chinese government's wish to replace the colonial education system or to introduce the teaching of *Putonghua*, which for more than half a century has been the cornerstone of an unwavering, all-embracing language policy on the mainland: "On the basis of the previous educational system, the Government of the Hong Kong Special Administrative Region shall, on its own, formulate policies on the development and improvement of education, including policies regarding the educational system and its administration, the language of instruction. . ." (HKSAR Government, 2012, p. 71). While the Basic Law stipulates that Chinese is the primary official language of the SAR (English being relegated to a secondary official role), the conveniently ambiguous term *Chinese* is left undefined, as indeed it was when Chinese was accorded co-official status in 1974. As in the late colonial period, Chinese is still interpreted in Hong Kong as Cantonese and standard written Chinese (with traditional characters) when characterizing language policy in the domains of education and government.

Although policymakers were not constitutionally obliged to introduce the teaching of *Putonghua*, Hong Kong's political and economic reintegration with reascent China since the early 1980s meant that the decision to promote the national language in the education system was inevitable and desirable. The plan to promote biliteracy and trilingualism was formally announced in the first policy address of Hong Kong's Chief Executive, C. H. Tung, although like the mother-tongue policy, it was instigated in the final years of British rule (Education Commission, 1996). For much of the colonial era, *Putonghua* played a largely peripheral role in the school system, being learned either as an extracurricular activity or—as 1997 loomed—as an optional subject on the timetable (Zhang &

Yang, 2004). However, it was only after the handover that *Putonghua* became a core component of the primary and secondary curricula (Davison & Auyeung Lai, 2007), initially as an independent language subject and more recently as the MOI for Chinese subjects. The rationale for using *Putonghua* rather than Cantonese, the traditional MOI for such instruction, is that the national language, unlike the local language,<sup>3</sup> corresponds closely to standard written Chinese (Li, 2006; Snow, 2004) and is therefore deemed to be a more effective means of enhancing the acquisition of literacy in Chinese (SCOLAR, 2003). Written Cantonese, though often used in the print media, is regarded in Hong Kong as being nonstandard (Li, 2006) and thus forms no part of the administration's linguistic vision.

### Patterns of Language Acquisition and Use

The term *vision* seems appropriate here, for while the government's choice of written and spoken codes is difficult to dispute given the SAR's reunification with the mainland (*Putonghua*), its status as a quasi-autonomous city-state (Cantonese), and its entanglement in the tightening web of economic globalization (English), the promotion of biliteracy and trilingualism appears to be a general aspiration rather than a precisely defined policy. One source of uncertainty concerns policymakers' expectations regarding the levels of proficiency that school graduates and the wider populace should possess in each code. In an important review article, Li (2009) questions whether their goal is "balanced" or "functional" biliteracy and trilingualism, assuming it to be the "more realistic" latter category, which is defined as "the ability to use the three languages to varying degrees of proficiency and for different purposes" (p. 82). The Chief Executive's early policy pronouncements, however, suggest that the former may have been in view. In his seminal 1997 address, Mr. Tung stated that the administration's goal was for graduates to be "proficient in writing English and Chinese and able to communicate confidently in Cantonese, English, and *Putonghua*" (HKSAR Government, 1997, p. 30), while two years later he declared that the objective was "to train our people to be truly biliterate and trilingual" (HKSAR Government, 1999, p. 23). In contrast, the government's advisory body on language education sensibly observed that it was "impractical and unrealistic to expect every member of our population to attain a high level of proficiency in both Chinese and English" (SCOLAR, 2003, p. 6), the use of the term *Chinese* unhelpfully masking the different circumstances which surround Hongkongers' acquisition and use of Cantonese, *Putonghua*, and written Chinese.

In his analysis of the policy, Li (2009) highlighted two "unfavourable acquisitional factors" (p. 74) that apparently impede the progress of English and *Putonghua* in the SAR (see also Li, 2011). The first is the contention that "for the majority of Hongkongers, English has very little reality outside school premises or in their lifeworld" (Li, 2009, p. 74). This assertion is presumably based on the fact that Cantonese is the first language of around 90% of the population (Census & Statistics Department, 2012) and is therefore the usual medium of spoken communication among Hongkongers, a major marker of their identity (Kuah-Pearce & Fong, 2010; Tsui, 2007), and the language towards which they have the

strongest integrative orientation (Lai, 2007, 2010, 2011). Since the handover, Cantonese has penetrated the high domains that for much of the colonial era were reserved for English: it is now the usual language of communication in the civil service (Evans, 2010a) and the legislature (Bolton, 2011), and—notwithstanding the increasing prominence of *Putonghua*—has retained its centrality in white-collar (and presumably blue-collar) employment (Evans, 2010b).

When considering the role of English in the SAR, and particularly Li's (2009) daring claim about its insignificance in most Hongkongers' lifeworld, it is necessary to distinguish between the spoken and written language and to remember that a significant segment of this world involves (for adults) workplace communication and (for adolescents and adults) socially inspired communication via computers and smartphones. A recent study by Evans (2010a, 2010b, 2011b) found that business people and civil servants spend a substantial proportion of their working lives reading and writing English documents and participating in speech events whose subjects and outcomes are invariably English texts of various kinds, even if—as is often the case—such interactions are conducted in Cantonese. The importance of reading and writing in English (particularly online) was also revealed by a large-scale survey of young Hongkongers' use of the language in their leisure time (Evans, 2011c). While the findings confirmed Li's (2009) perception that teenagers and young adults have little need to speak English in their everyday lives, the survey nevertheless indicated that they are exposed to a great deal of spoken English as a consequence of their watching films and television and listening to music. With regard to *Putonghua* use, we have little empirical evidence to test Li's plausible claim that young Hongkongers have “hardly any opportunities for meaningful practice beyond school premises” (p. 76; although see Ho, 2008). The workplace study referred to above found that, unlike spoken English and Cantonese, *Putonghua* currently plays a limited role in business communication (Evans, 2010a) and was therefore perceived by the 2,030 survey participants to be the least important of the five codes for business purposes, with written English being the most important, closely followed by Cantonese and spoken English, and written Chinese a distant fourth (Evans, 2010b).

The second set of factors that Li (2009) believed inhibit the acquisition of English and *Putonghua* include the typological distance that separates English and Chinese (the former being an Indo-European language, the latter a Sino-Tibetan language) and the linguistic differences between Cantonese and *Putonghua*, which lie primarily in their phonological systems. As Kirkpatrick and Chau (2008) argue, the typological gulf between English and Chinese weakens the claims of English to be the target language in an L2 immersion program in the Hong Kong context, *Putonghua* being (in their view) a more promising candidate owing to its close correspondence with written Chinese. This connection, as noted earlier, lies behind the initiative to teach Chinese language and literature through the medium of *Putonghua*. At present, this initiative does not encompass every primary and secondary school; nor does it extend to content subjects, which in the majority of schools have been taught mainly in Cantonese since the handover, as the next section reveals.

## PROMOTING MOTHER-TONGUE EDUCATION

### Medium-of-Instruction Policy at Junior Secondary Level (Years 7–9)

The mother-tongue MOI policy represented a fundamental shift in Hong Kong's educational landscape because in the final year of colonial rule more than 90% of secondary students were attending nominally English-medium schools (Evans, 2009). Under the policy, which was implemented in September 1998, most of these schools were compelled to switch to Chinese in years 7–9, although they were permitted to shift to English in years 10–13 since this examination-dominated stage fell beyond the nine years of free compulsory education provided by the government. Only 114 of Hong Kong's 421 secondary schools were exempted from the compulsory mother-tongue policy, having evidently satisfied the authorities that their staff and students were capable of teaching and learning effectively in English (Tse, Shum, Ki, & Wong, 2001). As expected, the language-based bifurcation of schools proved to be highly controversial (Tsui, 2004): many parents and students justifiably complained that the retention of an elite English stream containing the most academically able students was divisive and discriminatory (Choi, 2003). Given the centrality of English in higher education and professional employment, students assigned to English-medium schools were perceived to enjoy an unfair advantage in life, while those forced to attend Chinese-medium schools were denied access to valuable linguistic capital and therefore the prospect of educational and occupational advancement. As we shall see, the fine-tuning initiative, which abolishes the MOI-based labeling of schools, seeks to redress this wrong.

Although the policy emanated from plans conceived in the late 1980s (Education Commission, 1990), the issuance of what was called *firm guidance* to schools on their MOI soon after the handover (Education Department, 1997) was widely regarded as an abrupt and unwelcome departure from the long-standing practice of granting schools autonomy in MOI policymaking and as a political move arising from China's resumption of sovereignty (Poon, 2010). If the mother-tongue policy was indeed politically motivated, it could be interpreted as a bold (even mildly subversive) maneuver by the new administration to safeguard Hong Kong's distinctive Cantonese-based culture and identity rather than as a ploy to appease the potentially intrusive Beijing regime, which, if unencumbered by the one country, two systems framework, would presumably have sought to impose its one-country *Putonghua* policy. The evidence in fact suggests that the policy was motivated primarily by educational considerations, and particularly by the hardly novel notion that learning is more effective when undertaken in the mother tongue. The policy's origins and rationale are encapsulated in the motion debated and passed by the Legislative Council (1997) two months before the handover, urging the government "to expeditiously implement fully the policy of mother-tongue teaching which has already been put in place for nearly a decade so that secondary school students will be able to learn more effectively in their everyday language" (pp. 115–16). The mother-tongue policy is the SAR government's major language-in-education initiative and has therefore been the focus of considerable research in the past decade, much of it involving



some form of comparison between English- and Chinese-medium instruction. This research falls into three broad categories: policy implementation, teaching-learning processes, and learning outcomes.

### **Research into the Implementation of the Medium-of-Instruction Policy**

One strand of research has explored aspects of the implementation of the mother-tongue policy, generally by eliciting via surveys and interviews the attitudes, views, and experiences of administrators, teachers, and students. An early study by Tse et al. (2001) gauged the views of teachers and administrators on the issues that flowed from the transition from English- to Chinese-medium instruction. Teachers evinced a generally positive attitude towards mother-tongue teaching, but were unprepared for the policy change in 1998, despite its long period of gestation, and lacked confidence in their written Chinese, presumably due to its neglect during their English-medium secondary and tertiary studies. The investigation also highlighted a major obstacle to the promotion of mother-tongue education: parents' apparently greater concern for their children's career prospects than for their learning processes (see also Poon, 2009b). A subsequent study by Tse, Shum, Ki, and Chan (2007), which also incorporated English-medium teachers' perspectives, highlighted another critical factor in successful policy implementation: the importance of considering the views of professionals in the classroom. The teachers surveyed by Tse, Shum, et al. (2007) generally felt that the administration's centrally directed policy was deficient in this regard and instead recommended a return to school-based MOI decision making, which (presumably coincidentally) the fine-tuning initiative has in fact effected.

One likely consequence of the devolution of decision making is the reappearance of mixed-mode instruction in nominally English-medium classrooms. The eradication of such instruction was a central aim of the two-stream MOI policy: henceforth, teachers would be required to make consistent use of either Chinese (i.e., Cantonese and written Chinese) or English (Education Commission, 1990). This requirement was directed particularly at teachers in the 114 English-medium schools, who in many cases would have had to radically alter their approach to comply with the English-only directive (Evans, 2002). How faithfully they have observed this instruction is difficult to determine because direct methods of gathering this information such as classroom observations and recordings may not have elicited especially representative data given the Education Bureau's monitoring of language use and its threat to revoke a school's English-medium status if its teachers were found to be mixing English and Cantonese (Evans, 2009).

The only study that has attempted to examine this aspect of the policy's implementation, albeit on a small scale and using indirect methods, found that English-medium teachers had made a determined effort to adhere to the English-only directive (Evans, 2008d, 2009). While the alignment of policy and practice was not watertight, it was as close as might reasonably be expected given the predominance of Cantonese and the prevalence of code mixing in Hong Kong society (Low & Lu, 2006). This evidence, together with that derived from studies of teaching-learning processes, suggests that the years between the introduction

of the policy (1998) and the institution of fine-tuning (2010) may be the high-water mark in the history of English-medium schooling in Hong Kong, a period when around a quarter of local students received a bona fide L2 immersion education. This apparently stood in marked contrast to the experience of students in Chinese-medium schools who, for particular subjects or classes, switched officially to English-medium but actually to mixed-mode instruction at senior secondary level (Evans, 2009).

### **Research into Teaching-Learning Processes**

A second strand of research has examined teaching-learning processes in Chinese- and English-medium classrooms using direct methods of data collection complemented by interviews and surveys. The lessons analyzed by Ng (2007) apparently took place before 1998, since they occurred in a category of school (dual stream) that was abolished by the mother-tongue policy. Nevertheless, the research design employed by Ng (2007), which capitalized on the school's policy requiring teachers to give the same lessons in both languages and utilized observations, recordings, and interviews, enabled the direct comparison of the quality of teaching and learning in Chinese- and English-medium classes (see also Ng, Tsui, & Marton, 2001). Ng's findings are valuable because the fine-tuning initiative will presumably prompt some former Chinese-medium schools to offer certain subjects in both English and Chinese. Ng found that the use of the L2 hindered the smooth progression of lessons: when they used English, teachers had to devote a disproportionate amount of time to providing linguistic support (especially lexical), but when they taught in Cantonese, they were able to focus on the subject matter and inspire interaction and engagement. In contrast, classes taught in English featured recitation and memorization activities and a narrow focus on the component parts of concepts rather than on the whole and the relationship between parts and whole. Ng thus concluded that the MOI plays a "critical role in shaping a student's learning experiences" (2007, p. 168).

Unlike Ng (2007), Yip, Coyle, and Tsang (2007) compared teaching-learning processes in the post-1998 Chinese- and English-medium streams, focusing on the effects of the MOI on teaching styles and modes of instruction in science lessons. These effects were determined by the perceptions of 17,616 students in a questionnaire survey encompassing 100 schools and observations of 10 lessons (five in each type of school). The survey results indicated that lessons in Chinese-medium schools were more interactive and creative than those in English-medium schools. These perceptions were largely corroborated by classroom observations, which, though confirming Hong Kong teachers' preference for a didactic approach, nevertheless indicated that students taught in Cantonese were given more opportunities to participate in class discussions, answer cognitively demanding questions, and engage in group work. In contrast, students taught in English spent most of their time listening to the teacher lecturing (not always coherently) or working individually. When questioned by the teacher, they responded in a single word or phrase; when asked to work in groups, they communicated in Cantonese.

As noted earlier in this article, the mother-tongue policy applied only to years 7–9, and thus Chinese-medium schools were permitted to switch to English at senior secondary level. The impact of this transition on classroom interaction and language use was examined by Lo and Macaro (2011), who also, for the purpose of comparison, studied year 9 and 10 classrooms in English-medium schools, where it was anticipated (and subsequently confirmed) that the transition would be seamless since the MOI was unchanged. The findings were derived from recordings of 60 lessons together with retrospective interviews with the 18 teachers involved. These indicated that the shift in the MOI was manifested mainly in the written medium. In terms of the spoken medium, however, only one school effected a significant change in language use, from almost 100% Cantonese in year 9 to around 80% English in year 10. In the other Chinese-medium schools there was considerable variation in the amount of English used, which corroborates Evans's (2009) finding about the prevalence of mixed-mode teaching in the senior years. Lo and Macaro (2011) also discovered that lessons conducted in English in the MOI-switching schools were more teacher-centered (and therefore less interactive) than those taught in Cantonese, which accords with the findings of Ng (2007) and Yip et al. (2007).

### **Research into Learning Outcomes**

A third strand of research has investigated the impact of the MOI on learning outcomes, thus extending a line of inquiry that commenced in the 1970s (for an overview, see Marsh, Hau, & Kong, 2000) and played a central role in the formulation and justification of the mother-tongue policy in the 1990s (Choi, 2003). One of the difficulties of conducting comparative studies during this period was the prevalence of mixed-mode instruction in the unreformed English-medium schools and the virtual absence of schools in which Chinese was the official MOI. This problem largely disappeared between 1998 and 2010, when schools evidently fulfilled their government-imposed MOI obligations (at least in years 7–9). Despite this, measuring the impact of the teaching medium on student learning remains a complex task, principally because the most academically able students are allocated to English-medium schools, but also because student performance is influenced by a multiplicity of variables, which even the most ingenious investigator may struggle to control. Notwithstanding these challenges, several comparative studies have been undertaken in recent years, focusing either on outcomes in content subjects or in L2 acquisition.

A study by Yip, Tsang, and Cheung (2003) examined the impact of the MOI on achievement in science through a test comprising multiple-choice questions and more cognitively demanding free response questions, which was administered to year 8 students in 100 schools. Recognizing the disparity in student intakes between the two types of school, they categorized Chinese-medium schools into high, medium, and low on the basis of student ability, the high schools being somewhat comparable to English-medium schools. They discovered that students from the top Chinese-medium schools demonstrated higher achievement than students in the English-medium stream. The English-medium students outperformed the high Chinese-medium students on only a small number of

multiple-choice items, which Yip et al. (2003, p. 324) claimed made “relatively low cognitive demands” on the test takers. Their overall conclusion was that students in English-medium schools lacked the requisite L2 proficiency to learn science effectively and were thus at a disadvantage compared to students in the Chinese-medium stream.

Yip et al.’s (2003) conceptualization of the outcomes of science learning comprises two components: academic achievement and a student’s self-concept in the subject, which is explored in another article from their project (Yip & Tsang, 2007). This component was determined by the responses of the aforementioned test takers to a questionnaire. These responses indicated that students taught in English had a lower self-concept in science than their Chinese-medium counterparts, despite being “more academically oriented” and were “recognised socially as an elite class among their peers” (Yip & Tsang, 2007, p. 409). Yip and Tsang attributed this to the challenges associated with studying a difficult subject in an L2. The challenges posed by English-medium instruction were also highlighted in a study by Lau and Yuen (2011) into the effect of the MOI on the learning of computer programming. This was measured by the performance of 219 year 10 and 11 students from nine schools on a 25-minute programming performance test. Lau and Yuen found that Chinese-medium students generally outperformed their English-medium counterparts, with low- and middle-ability students in English-medium schools being “notably at-risk” when studying computer programming in an L2 (2011, p. 194).

The benefits of mother-tongue teaching revealed by professors in ivory towers are unlikely to deflect parents in concrete towers from their belief in the advantages of English-medium instruction. Hong Kong parents do not require empirical evidence to know that learning in the mother tongue is generally more effective and that studying in English represents a considerable challenge. Their long-standing preference for English-medium teaching rests on the conviction that using English as the MOI is a better means of achieving high levels of proficiency in an occupationally valuable L2 than teaching English solely as a language subject. Recent research (as discussed below) suggests that their faith in English-medium instruction is not misplaced. This research examines the impact of the MOI on students’ vocabulary knowledge, a highly sensitive indicator of language proficiency and one that is especially amenable to measurement given the availability of well-established instruments such as the Vocabulary Levels Test (VLT; Laufer & Nation, 1999; Nation, 1990).

These instruments were used by Lo and Murphy (2010) in their study of students’ L2 vocabulary knowledge in two secondary schools (Chinese- and English-medium), which they claim were “closely matched” (p. 220) in terms of students’ academic ability, socioeconomic status, English-learning experience at primary level, and exposure to English outside school. Three aspects of the vocabulary of year 7 and 9 students were measured towards the end of each school year: passive, controlled active, and free active. In terms of passive and controlled active vocabulary, year 7 students in the English-medium school obtained “significantly higher total scores” (p. 225) on both versions of the VLT than their counterparts in the Chinese-medium school. Year 9 English-medium students possessed a passive knowledge of 3,338 word families compared to

Chinese-medium students' 2,170, and a controlled active vocabulary of 2,027 families compared to Chinese-medium students' 984. Regarding free active vocabulary, which was determined by lexical frequency profiling, Lo and Murphy found that students in the English-medium school "consistently demonstrated superior vocabulary knowledge" in their compositions (p. 228). While caution needs to be exercised over these findings (it is, of course, difficult to form comparable samples and to control the manifold non-MOI-related variables that influence L2 acquisition), they are not especially surprising, for, as Lo and Murphy pointed out, English-medium students are exposed to a wider variety and greater quantity of English-language texts and have more opportunities to use the vocabulary they have acquired than their Chinese-medium counterparts. This gives them a distinct advantage in gaining admission to higher education and adapting to its academic demands.

This advantage was confirmed by Lin and Morrison (2010), who found that first-year undergraduates from English-medium schools possessed significantly larger active and passive vocabularies than those from Chinese-medium schools, and by Evans and Morrison (2011a), who discovered that English-medium students made a smoother transition to university studies than their less proficient Chinese-medium counterparts. The participants from Chinese-medium schools in these two studies formed a minority in their institution and constituted the elite of the Chinese-medium stream. Recognition of the difficulties experienced by Chinese-medium students in the crucial matter of university admission, which were highlighted in an influential study by Tsang (2009), appears to have been the main factor behind the Education Bureau's decision to fine-tune the mother-tongue policy in the late 2000s.

## **FINE-TUNING OF MEDIUM-OF-INSTRUCTION POLICY**

Tsang's (2009) study revealed that Chinese-medium students' chances of meeting the minimum qualifications required for admission to the SAR's English-medium universities were only about half those of students taught in English. Tsang attributed this disparity to "the significant negative value-added effects of the CMI [Chinese-medium instruction] stream on students' achievement in use of English at A-S level in comparison with EMI [English-medium instruction] students of equivalent background" (p. 1). These findings, which were widely reported in the press (though not apparently in scholarly journals), offered empirical confirmation—if they needed it—of parents' concerns about English-language learning in the Chinese-medium stream and underscored the injustice of labeling students on the basis of their performance at primary school. The study may also have persuaded the government to reconsider the unpopular policy.

The first major review, which was published seven years after its implementation, in fact reaffirmed the mother-tongue policy and cautioned against a return to "the pre-1998 scenario when many secondary schools claimed to adopt English-medium teaching but actually practised otherwise" (Education Commission, 2005, p. 19). The review included an annex summarizing the findings of

a number of research projects, which indicated that “mother-tongue teaching is bearing fruit” (p. 8). Despite these findings and the Education Commission’s endorsement, the Education Bureau (2010) embarked on an “extensive public consultation” in 2008 (p. 2) and received “further recommendations” on the “specific standards of the three prescribed criteria” which schools had to fulfill if they wished to adopt English as the MOI (viz., student ability, teacher capability, support measures) as well as a “review mechanism” (p. 6). The Education Bureau accepted these recommendations and in May 2009 announced the fine-tuning policy, which permits former Chinese-medium schools—MOI-based school labeling having been abolished—to teach content subjects in English if 85% of the students in a particular class are in the top 40% of their age group academically. The policy, which was implemented in September 2010, also allows such schools to devote up to a quarter of lesson time in Chinese-medium subjects to “extended learning activities” in English (Education Bureau, 2010, p. 8). According to the Education Bureau, fine-tuning offers students more opportunities to use English in years 7–9 under the overarching (and somewhat contradictory) “policy goal” of “upholding mother-tongue teaching while enhancing students’ proficiency in both Chinese and English” (p. 7). It is clear, however, that proficiency in English is the priority, since this will “enhance their ability to learn in English and to better prepare them for further studies and work in future” (p. 7).

The medium of further studies in Hong Kong is of course a matter that falls within the ambit of government policymaking: extending mother-tongue teaching to tertiary level would reduce the need (and therefore desire) for English-medium teaching at secondary level and thereby resolve the perennial controversy over who should receive such instruction, when it should commence, and how it should be conducted. However, barring a major political upheaval, it is hard to envisage the authorities making such a momentous move given the global spread of English-medium higher education, the status of English as the preminent language of research, and the administration’s own efforts to position Hong Kong as a higher education hub. As Evans and Morrison (2011b) discovered, these processes have intensified the use of English as a university MOI in the past decade. Unlike further studies, the medium of the workplace falls outside the sphere of government policymaking (at least in the private sector). However, it is hard to imagine a diminution in the role of English given its centrality in the territory’s service-oriented economy and the administration’s branding of Hong Kong as Asia’s World City, which demonstrates its willingness to embrace the challenges posed by economic globalization and therefore the need for its workforce to be proficient in the global lingua franca.

By increasing the amount of English-medium teaching in the former Chinese-medium schools, the fine-tuning initiative runs counter to the goal of “upholding” mother tongue teaching (Education Bureau, 2010, p. 7), which in any case had been flouted by the post-1998 retention of an English-medium stream, and to the findings of research, which indicated that such instruction was “bearing fruit” (Education Commission, 2005, p. 8). Nevertheless, fine-tuning is a well-intentioned, inevitably contradictory attempt by the government to defuse parental discontent and wriggle free from an invidious policy predicament. It does this by offering schools “greater flexibility in devising their MOI

arrangements” (albeit with less scope than during the colonial era) in order to “maintain the steady and sustained development of mother-tongue teaching” (Education Bureau, 2010, p. 7). However, as a recent survey by Kan, Lai, Kirkpatrick, and Law (2011) portends, this flexibility will be used to increase English-medium teaching and therefore reduce rather than maintain mother-tongue teaching. As most students will be unable to cope with full-blown instruction in English, this will inevitably result in a return to mixed-mode instruction in English-medium subjects, and perhaps also in Chinese-medium classes (where authoritative English textbooks might be used). While the Education Bureau appears to take a slightly more tolerant view of mixed-mode teaching than in the past, it nevertheless falls well short of recommending the potentially valuable bilingual strategies advocated by Lin (2006), Kirkpatrick and Chau (2008), and Lin and Man (2009): the spoken language in English-medium classes should “primarily” be English (Education Bureau, 2010, p. 26). The term *Chinese* is not defined, although it is assumed to denote written Chinese and Cantonese rather than *Putonghua*, which in fact is scarcely mentioned in the document. This is a curious omission given policymakers’ trilingual vision and, as discussed below, their well-documented desire to make it the usual MOI in Chinese.

### TEACHING CHINESE IN PUTONGHUA

The long-term aim of teaching Chinese language and literature in *Putonghua* was established by the Curriculum Development Council in 2000 and, as noted earlier, was founded on the belief that its correspondence to written Chinese would enhance students’ literacy skills in Chinese and of course accelerate their acquisition of the language itself (SCOLAR, 2003). The authorities thus set and began working towards this goal before they had any empirical evidence to support their conviction. Initial studies, as reported in SCOLAR, proved to be inconclusive, and thus a gradual, school-based approach to implementation was adopted. We now have a little more evidence, and this is still inconclusive. This uncertainty has not, however, diminished the government’s enthusiasm for the initiative, which has now been implemented in a significant proportion of the SAR’s primary and secondary schools.

The small but growing body of research in this area falls into two main categories: teacher perceptions and student achievement. The first category includes Tam’s (2011, 2012) single-school study of teachers’ perspectives on the initiative, particularly in terms of its impact on students’ general Chinese competence, writing skills, and *Putonghua* proficiency. These perspectives were derived from interviews with 10 Chinese-language teachers together with classroom observations and document analysis. Tam (2011, 2012) discovered that the use of *Putonghua*, an L2 for most Hong Kong students (Li, 2009), created the same kinds of problems and conditions as those associated with English-medium instruction: a transmissional approach, restricted teacher questions, limited student engagement and L2 output, a lack of deep learning and critical thinking, and a ponderous pace of learning. Teachers were generally skeptical about the effect of *Putonghua*-medium teaching on students’ ability to read and write Chinese, and indeed on their acquisition of *Putonghua* itself.

One of the articles from Tam's (2012) project pointed to a divergence of opinion between teachers and school administrators on the value of the initiative. Whereas the former were ambivalent (Cantonese being, for some, a more effective MOI), the latter were apparently supportive. This was not primarily because administrators thought it would enhance the skills of their students, but because it would improve the standing of their school. In an era of falling birthrates and school closures, the teaching of Chinese in *Putonghua* is seen by anxious administrators as an attractive promotional strategy. The marketing dimension of the initiative also emerged from Gao, Leung, and Trent's (2010) biographical interviews with eight Chinese-language teachers. Like Tam's (2011, 2012) informants, some of these teachers were skeptical about its educational (if not promotional) effectiveness. As with the English-promoting fine-tuning policy, the *Putonghua*-promoting initiative in Chinese will reduce the amount of time devoted to mother-tongue teaching, notwithstanding the government's stated aim of upholding such an apparently effective form of instruction.

The teachers surveyed by Shum, Tsung, and Gao (2011) evinced a rather more positive attitude towards *Putonghua*-medium instruction than those interviewed by Tam (2011, 2012). They generally believed that the approach could enhance students' speaking, listening, and writing skills, but were uncertain of its impact on their reading ability or reading habits. The main problem identified by Shum et al.'s participants (168 teachers from 23 schools) was the lack of a conducive environment for learning *Putonghua*, which substantiates Li's (2009) point about students' limited exposure to and use of the language in their Cantonese-dominated "lifeworld" (p. 74). In this regard, it is ironic that the language proficiency and cultural background of the growing number of *Putonghua*-speaking students from China are apparently being spurned rather than exploited by Hong Kong schools. As Gu (2011) discovered, recent immigrants face considerable pressure to master Hong Kong-style Cantonese, *Putonghua* being viewed as a low-status and irrelevant language by their locally raised classmates.

Although the studies just reviewed offer valuable perspectives on the effectiveness of *Putonghua*-medium instruction, they provide no evidence of its impact on students' literacy development in Chinese (i.e., its main rationale) or the relative efficacy of Cantonese and *Putonghua* as MOI. The only study that sheds some light on these questions is the Hong Kong-wide investigation into year 4 primary students' reading ability conducted by Tse and colleagues (Tse, Lam, Loh, & Lam, 2007; Tse, Loh, Lam, & Lam, 2010), which was part of the international Progress in Reading Literacy Study. The first article compares the reading abilities of students on the basis of their home language: Cantonese or *Putonghua*. Tse, Lam, et al.'s (2007) hypothesis that students who spoke *Putonghua* at home would possess superior reading ability was not confirmed: children who spoke Cantonese at home and "sometimes" *Putonghua* achieved the highest reading scores, regardless of their birthplace or socioeconomic status. The findings did not therefore support the view that the differences between Cantonese and standard written Chinese will inevitably and seriously complicate students' language development. The second article compares students' reading attainments on the basis of their school's MOI for Chinese subjects (i.e.,



Cantonese or *Putonghua*). Tse et al. (2010) discovered that students who had studied in Cantonese outperformed those who attended schools where the MOI was *Putonghua*. The findings thus call into question the belief that *Putonghua* is a more effective MOI for developing students' Chinese reading ability and therefore a key rationale behind the government's promotion of this initiative.

## CONCLUSION

This article has examined the background of and rationale for the government's aim of creating a biliterate and trilingual society in post-colonial Hong Kong. This aspiration represents an attempt to balance the claims of two major non-autochthonous languages, one a core component of the networks and systems of globalization, the other the national language of the world's rising political and economic power, as well as those of a vibrant and ubiquitous local language. The article has also reviewed research into the major initiatives the administration has adopted since 1997 in order to achieve its ambitious (if rather nebulous) linguistic vision, namely, the promotion and subsequent fine-tuning of a controversial mother-tongue policy in years 7–9 and the advocacy of *Putonghua*-medium instruction in Chinese language and literature at primary and secondary levels. Perhaps unsurprisingly, this account has revealed a number of contradictions and disjunctions among the vision invoked by the government, the policies it has actually instituted, and the evidence revealed by policy-related research.

Although the administration apparently does not aspire to balanced biliteracy and trilingualism, its policies at secondary level mean that students have emerged from the school system with markedly different functional competence in the five codes. While they may have received similar amounts of instruction in *Putonghua*, their exposure to and use of written Chinese, Cantonese, and written and spoken English will have varied considerably according to whether they were assigned to English- or Chinese-medium schools. These differences, which have significantly shaped students' opportunities in life, will be reduced somewhat by the fine-tuning initiative, which will see an increase in written and spoken English vis-à-vis written Chinese and Cantonese in the former Chinese-medium schools (and thus a further skewing of the vision).

Fine-tuning represents a partial retreat from the government's major post-handover language policy: the promotion of Chinese-medium education. As we have seen, the mother-tongue policy was justified by research evidence pointing to its efficacy and endorsed by the legislature in May 1997. However, rather than impose the policy in every school, the authorities permitted a select group of schools, containing the best students, to continue teaching in a language that plays a key educational and occupational role in Asia's World City. The fine-tuning policy is equally contradictory: while it aims to uphold mother-tongue teaching, it actually undermines it by offering greater scope for English-medium instruction. The *Putonghua*-medium initiative in Chinese subjects also reduces the role of mother-tongue teaching.

This trend not only runs counter to the government's stated policy aim, but also to the findings of research into teaching-learning processes and content-area learning outcomes, which highlight the advantages of mother-tongue

teaching and the problems that accompany the use of an L2 (be it English or *Putonghua*) as a teaching medium. This raises important questions about the role of research in language policymaking: in the case of Hong Kong, policies have been introduced on the basis of research (mother-tongue teaching), altered despite research indicating that the existing policy is “bearing fruit” (fine-tuning), and launched without any empirical evidence at all (*Putonghua*-medium instruction). The upshot of these developments is that Cantonese, the mother tongue of most Hong Kong students, is actually losing ground to English and *Putonghua* as a teaching medium, despite being (on paper) the principal objective of language-in-education policy and the language that research has shown to be the most effective medium for teaching and learning. These developments thus provide further evidence, if any is needed, that educational factors and research findings are not necessarily paramount in shaping language-in-education policy (Tollefson & Tsui, 2004), a trend that is unlikely to change as Hong Kong continues its long and meandering march towards biliteracy and trilingualism.

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## NOTES

- 1 The term *mother tongue* denotes first language or the usual language spoken at home. It is used in this article because it is the usual term in government discourse about language-in-education policy. The mother tongue of most Hong Kong Chinese, Cantonese, is mutually unintelligible with other varieties of Chinese, including *Putonghua*, which is the standard national language of China (Snow, 2004). *Putonghua*, which is also known as Mandarin, is largely based on the phonology of the Beijing dialect and forms the basis of standard written Chinese. The written language in China uses simplified characters, which were introduced in the 1950s and 1960s in order to increase literacy. Hong Kong continues to use traditional Chinese characters (see Li, 2006).
- 2 Studies of colonial language policies between the early 1950s and the late 1970s would be particularly illuminating. China’s isolationist stance towards Hong Kong and the West during this period severely limited school graduates’ opportunities for higher education and employment on the mainland. With the traditional avenues to socio-economic advancement obstructed, they had little choice but to further their studies or careers in Hong Kong, where the linguistic market (Bourdieu, 1991) clearly favored English (Lin, 1996). It would be interesting to examine the precise role the colonial government played in the rapid expansion of Anglo-Chinese secondary schools (as English-medium schools were then labeled) before the introduction of free, compulsory education (years 1–9) in the late 1970s.
- 3 This applies particularly to the variety of Cantonese that is used in informal communication (e.g., at home, among friends). However, the variety of Cantonese that is used for more formal functions, such as news broadcasts, speeches, and lectures, has a much closer correspondence to standard written Chinese.

**ANNOTATED BIBLIOGRAPHY**

Bolton, K. (2011). Language policy and planning in Hong Kong: Colonial and post-colonial perspectives. *Applied Linguistics Review*, 2, 51–71.

This article provides an overview of language policy and planning during the colonial period as well as a detailed discussion of current policies and practices in the domains of government, law and education. Bolton points out that Hong Kong has yet to feel the full weight of metropolitan and national policies, but if these are eventually imposed, he argues that the principal source of contention will be the relationship between Cantonese and *Putonghua* rather than that between Chinese and English.

Choi, P. K. (2010). “Weep for Chinese university”: A case study of English hegemony and academic capitalism in higher education in Hong Kong. *Journal of Education Policy*, 25, 233–252.

This article provides an insider account of a controversy over language policy at the Chinese University of Hong Kong, where, uniquely among Hong Kong’s universities, Chinese is an important MOI. The university’s tradition of Chinese-medium teaching is being threatened by the current process of internationalization, which inevitably stimulates the use of English as the MOI. Choi examines this controversy in the context of the onslaught of academic capitalism and the hegemony of English. The article highlights the difficulties of promoting mother-tongue education at tertiary level in the current climate.

Lin, L. H. F., & Morrison, B. (2010). The impact of the medium of instruction in Hong Kong secondary schools on tertiary students’ vocabulary. *Journal of English for Academic Purposes*, 9, 255–266.

This article presents the findings of a study that sought to gauge the effect of school MOI on the size of first-year undergraduates’ English academic vocabulary. Students from English-medium schools were found to possess significantly larger active and passive vocabularies than their Chinese-medium counterparts and were therefore able to write academic essays of a higher quality. The study thus highlights the disadvantages faced by students from Chinese-medium schools when adjusting to English-medium higher education.

Poon, A. Y. K. (2010). Language use, and language policy and planning in Hong Kong. *Current Issues in Language Planning*, 11, 1–66.

This article provides a comprehensive review of the literature on the language profile of Hong Kong, the causes and consequences of language spread in society, language policy and planning, and the changing language situation. The article offers a detailed account of language-in-education policies and practices in the late 20th century, particularly the formulation and implementation of the controversial mother-tongue policy during the 1990s.

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