

## Message from the Working Group

To nurture talents, schools should provide a conducive learning environment so that our students enjoy learning, thinking and participation, and as a result, attain all-round cognitive and character development. The Medium of Instruction (MOI) and the Secondary School Places Allocation (SSPA) mechanism are two important education issues that affect the school learning environment. They have all along been matters of great public concern. Given their inextricable links, the two issues are by nature complex and contentious.

Since the Education Commission's Working Group on Review of SSPA and MOI for Secondary Schools began its work in July 2003, my colleagues and I have drawn reference from a good number of research studies and literature reviews, conducted school visits and classroom observations, and held extensive and in-depth exchanges with different stakeholders to explore proposals which would take into account both the educational considerations and the practical needs.

With a view to achieving the objectives of basic education, we have formulated our proposals **with the interest of students as the primary concern. Attaining the aims of basic education guides our deliberation on how we can make steady improvements on the basis of current achievements.** Other considerations pale by comparison.

We firmly believe that **the mother tongue is the most effective MOI for all students. Learning through a second language** (i.e. English for the majority of students in Hong Kong) **inevitably creates language barriers, the kind and extent of which may vary from student to student.** For most students, the barriers would reduce their interest and effectiveness in learning. We therefore recommend the continued adoption of the mother tongue as the mainstream MOI for secondary schools. However, we understand the aspiration by some people for English-medium teaching. **We have no objection to some schools adopting English as the MOI, provided that they can fulfill the prescribed criteria** for English-medium teaching thereby minimizing the language barriers to learning.

We acknowledge that our students must be proficient in both Chinese and English in order to lay a sound foundation for life-long learning and maintain the competitiveness of Hong Kong as an international metropolis. Therefore, **irrespective of the MOI adopted, schools should endeavour to nurture talents proficient in both Chinese and English.**

We hope that through improvements to the SSPA mechanism, we can encourage the **diversified development** of schools and all-round development of students, **provide parents/students with more choices**, and contain the within-school diversity at a level currently manageable by **secondary schools and teachers** so as to give them space to **consolidate their experience in trying out “remedial and enhancement” measures** to address the problem.

I would like to express my gratitude to all members of the community who have given us their views in the course of our deliberation. We would appreciate your views/suggestions on our proposals set out in this document. Let us work together to make our school education more effective in nurturing talents for tomorrow’s society.

(Michael Tien)  
Chairman,  
Working Group on Review of  
Secondary School Places Allocation and  
Medium of Instruction for Secondary Schools

## Executive Summary

### Background

1. In September 2000, the Government accepted the *Reform Proposals for the Education System in Hong Kong (Reform Proposals)* published by the Education Commission (EC), and undertook to review the short-term mechanism of the Secondary School Places Allocation (SSPA) system in the 2003/04 school year. Separately, the Government started implementing the *Medium of Instruction Guidance for Secondary Schools (Guidance)* in 1998. In 2000, the Government accepted the recommendation of a joint working group set up by the former Board of Education and the Standing Committee on Language Education and Research (SCOLAR) that the medium of instruction (MOI) arrangement for secondary schools should be considered alongside the review of the SSPA mechanism in the 2003/04 school year.

### Objectives

2. The EC hence set up the Working Group on Review of SSPA and MOI for Secondary Schools (Working Group) in July 2003 to take forward the review. Members of the Working Group unanimously agreed that the review should be **guided by the interest of students** in order to **fulfill the following objectives of the nine-year basic education:**

- (a) **to enable every student to develop to the full his/her individual potential in the domains of ethics, intellect, physique, social skills and aesthetics;**
- (b) **to ensure that students attain the basic standards and encourage them to strive for excellence; and**
- (c) **to encourage students to take the initiative to learn, develop the ability to think and create, and cultivate positive attitudes and values.**

3. The Working Group has now completed the review. The proposals have been formulated on the basis of the guiding principles outlined in paragraph 2 above. Their essence is as follows:

- (a) **Since mother-tongue teaching best realizes the objectives of education, continuing to uphold mother-tongue teaching should be the orientation of the MOI arrangement for secondary schools.**

- (b) **Irrespective of the language through which they learn, students should enhance their proficiency in both Chinese and English** so as to establish a solid foundation for life-long learning.
- (c) **Learning through a second language inevitably creates language barriers, the kind and extent of which may vary from student to student. For most students, such barriers would reduce their interest and effectiveness in learning. Therefore, without prejudice to students' learning of content subjects and whole-person development, and only when schools fully fulfill the prescribed criteria of student ability, teacher capability and support measures, could they adopt English as the MOI.**
- (d) The proposed SSPA mechanism should aim to increase parental choice as far as possible and promote all-round development of students.
- (e) The proposed SSPA mechanism should help contain the within-school student diversity at a level currently manageable by secondary schools and teachers. The aim is to facilitate secondary schools to develop students' potentials through identifying support or enrichment strategies.

4. While considering ways to uphold mother-tongue teaching, the Working Group also emphasizes the importance of enhancing students' English proficiency. The Working Group considers it equally important that schools using English as the MOI should strengthen the teaching of Chinese and Chinese culture. Nevertheless, since Hong Kong is predominantly a Chinese society with plenty of exposure to Chinese and Chinese culture in daily life, parents are generally more concerned about the English standard of their children. The Working Group acknowledges this concern. Therefore, this document gives a more detailed treatment to ways to enhance students' English proficiency while mother-tongue teaching is practised.

#### **Current MOI Policy for Secondary Schools**

5. A number of studies indicate that **students learn best in their mother tongue. To learn effectively through a second language** (i.e. English for students in Hong Kong), **students need to have high proficiency in both their first and second languages, as well as a strong learning motivation and ability** to overcome the language barriers. In general, the **overall academic performance can be used to gauge learning motivation and ability.**

6. Hong Kong does have a practical need for a workforce with a high level of English

proficiency in order to maintain her competitiveness as an international commercial and financial centre. **Using English as the MOI** may increase students' exposure to English and enhance their English proficiency. **However, this is not the only or best means.** It is not worthwhile if students' subject learning is affected as a result. For the majority of students, **the key to enhancing their English proficiency lies in the teaching and learning of the language (language education), and not necessarily in using the language as the MOI (language in education).** The Working Group does not object to EMI teaching under appropriate conditions since this can facilitate the learning of English. However, this must not compromise students' subject learning.

7. The Government has been actively encouraging secondary schools to adopt Chinese as the MOI as early as in the 1980s. However, a great majority of schools opted for EMI and many students encountered difficulties in learning. Marking the explicit enforcement of mother-tongue teaching, the *Guidance* was promulgated in 1997. According to the *Guidance*, schools wishing to use English as the MOI must demonstrate their fulfillment of the three prescribed criteria, namely student ability, teacher capability and support measures. As a result, 112 public-sector secondary schools have been allowed to use English as their MOI (EMI schools), while some 300 schools have used Chinese as their MOI (CMI schools).

8. Results of the studies conducted by the Government and universities, quality assurance inspections conducted by the Education and Manpower Bureau (EMB) since the implementation of the *Guidance* in the 1998/99 school year, school visits by the Working Group and analyses of the results of the Hong Kong Certificate of Education Examination (HKCEE) in 2003 and 2004 **all show that mother-tongue teaching is bearing fruit.** Mother-tongue teaching makes it easier for students to acquire subject knowledge, master high-order thinking skills, and develop interest in learning. The Working Group gauges from its school visits and discussions with stakeholders the progressive acceptance of the positive impacts of mother-tongue teaching. The Working Group considers that **the way forward is to continue with the adoption of mother-tongue teaching, making steady improvements on the basis of current achievements while also emphasizing the importance of enhancing students' English proficiency.**

### **Proposals on MOI for Secondary Schools**

9. The Working Group concurs with the Government's promotion of mother-tongue (i.e. Chinese-medium) teaching. With the implementation of the *Guidance* in the past six years, mother-tongue teaching has started to bear fruit. In charting the way forward for the

MOI arrangement, the Working Group has arrived at the following conceptual framework:

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

10. The proposals of the Working Group on the prescribed criteria for EMI teaching are summed up below.

#### Student Ability

11. As mentioned in paragraph 5 above, since the overall academic performance can be used to gauge student ability, the Working Group proposes:

- (a) **In assessing students' ability, their overall academic performance in the internal assessment (IA) of their primary schools (the second term of Primary (P) 5 and the first and second terms of P6) is taken as the basis. However, given the disparity in the assessment modes and standards among schools, a scaling instrument is needed. For this purpose, the IA results will be scaled by the pre-Secondary 1 Hong Kong Attainment Test (pre-S1 HKAT) currently conducted annually.**
- (b) **Since past data demonstrate the stability of pre-S1 HKAT results between two adjacent cohorts of the same school, it is proposed to collect samples of the pre-S1 HKAT results biennially and to take the average of the results of the two most recently sampled pre-S1 HKATs to derive the instrument to scale primary schools' IA results of the coming cohort of P6 students proceeding to Secondary (S) 1.**
- (c) A research study indicates that currently, at most 40% of S1 students are able to learn through English. Therefore, the Working Group proposes that the scaled scores will be put into a pecking order and **the top 40% of students will be taken as having the ability to learn through English.**
- (d) According to the *Guidance*, schools intending to adopt English as the MOI

must have at least 85% of students being able to learn through English. We propose to continue with the requisite percentage. **Should the within-school streaming be adopted, an EMI class should have at least 85% of its students being EMI-capable. Should schools be bifurcated into EMI and CMI schools, then an EMI school should have at least 85% of its S1 intake being EMI-capable.**

### Teacher Capability

12. Regarding the language proficiency requirement of EMI teachers, the Working Group considers the basic requirement as **“teachers should be able to communicate their subject content to students intelligibly and their use of English should have no adverse impact on students’ acquisition of the English language”**. Specifically, the Working Group proposes that teachers should attain any of the following qualifications in order to be eligible to teach in EMI:

- (a) **a Grade C or above in English Language (Syllabus B) in the HKCEE, or its equivalent** (including band 6 or above in the International English Language Testing System; a pass or above in English in the General Certificate of Education Ordinary Level (Overseas) Examination);
- (b) a Grade D or above in Use of English in the Hong Kong Advanced Level Examination;
- (c) having met the Language Proficiency Requirements (English); or
- (d) a Grade C or above in English Language in the defunct Hong Kong Higher Level Examination.

13. As for **serving EMI teachers who have not attained any of the above qualifications**, they may have their capability certified in **one of the following ways**:

- (a) **to obtain the relevant qualifications within two years starting from the 2005/06 school year; or**
- (b) **to opt for classroom observation by both subject and language experts appointed by the EMB** to assess their overall capability to teach through English, *viz.* “to communicate the subject content intelligibly and their use of English should have no adverse impact on students’ acquisition of the English

language”.

14. Besides, EMI teachers should accumulate a minimum of 15 hours of EMI-related continuous professional development activities for every three years.

#### Support Measures

15. The Working Group is of the view that secondary schools using English as the MOI should purposefully and **strategically provide a language environment conducive to learning English**. These include, for instance:

- (a) strengthening the teaching and learning of English as a subject;
- (b) creating an English-rich environment; and
- (c) devising well designed bridging programmes.

16. The Working Group proposes that schools intending to adopt English as the MOI should set out the related support strategies and specific measures in their **school development plans and annual school reports**. **Based on the results of schools’ self-evaluation and external school review mechanism, the EMB could then assess qualitatively and quantitatively whether adequate support measures are in place.**

#### MOI Arrangement at Junior Secondary Levels

17. The Working Group has considered two main options, namely the within-school approach and the bifurcation approach. Intuitively, **the within-school approach** (i.e. adopting different MOI for different classes) not only **allows greater flexibility to schools**, but also reduces the “MOI-mismatch” of students and provides parents with more choices. However, there are many drawbacks associated with this option:

- (a) Given the community’s prevailing preference for EMI teaching, the number of EMI classes in a school might be conveniently used as an “indicator” of how “good” a school is. People may devise a more elaborate school labelling schema by drawing up a “league table” of schools according to the number/proportion of EMI classes they operate, i.e. with full adoption of EMI being regarded as grade one schools, and the grade drops in tandem with the decreasing number or proportion of EMI classes. It would, in effect, create multiple labelling among schools.

- (b) The strong labelling effect could induce schools to seek to operate as many EMI classes as possible so as to attract students. Due to market forces, many schools might operate EMI class(es) as far as they can. Some schools that have so far been upholding mother-tongue teaching would be under immense pressure to operate some EMI classes, even though this may be contrary to their education philosophy.
- (c) The streaming of students into EMI or CMI classes within the same school would also undermine the self-image of CMI students and induce within-school labelling. Students would also be subject to the unsettling effects of possible switches between CMI and EMI teaching in S2 and S3.
- (d) In the pursuit of more EMI classes, schools may find it prudent to require teachers to obtain the qualifications for EMI teachers as mentioned in paragraphs 12 and 13 above as early as possible. Besides, teachers need to prepare teaching materials and examination papers in both English and Chinese, as well as to devise different teaching pedagogies and support measures for different MOI classes. The pressure on and workload for teachers will increase significantly.

**Overall, the within-school approach would impede the overall development of schools and bring about undue pressure on teachers and students.**

18. If bifurcation of CMI and EMI schools is maintained,

- (a) Secondary schools will continue to be predominantly CMI schools. Schools would not feel pressured to switch to EMI teaching for some junior secondary classes, thus obviating the problem set out in paragraph 17 above.
- (b) With the same MOI, all CMI schools will have a “fair competition”. They can develop their own characteristics in school-based curriculum, student support, diversified extra-curricular activities and home-school cooperation, etc. They can also capitalize on the relatively greater space for development by focusing on teaching pedagogy improvements and strengthening of language education.
- (c) It entails lesser pressure on teachers, thus enabling them to have more time

for student support, professional development and enhancing teaching effectiveness.

- (d) The labelling effect of the bifurcation approach is notably less than that of the within-school streaming.
- (e) Students can experience their junior secondary education through the same MOI, without being subject to the undue anxieties arising from switches between CMI and EMI classes.

Therefore, **with student effective learning and all-round development as the overriding concern, the Working Group proposes to maintain the current bifurcation approach under which most of our secondary schools would practise mother-tongue teaching. This would help promote the development of mother-tongue teaching which has begun to bear fruit.**

19. Besides, the Working Group proposes to **introduce a six-yearly review mechanism to assess whether there should be any change to the MOI adopted by individual schools.**

#### **MOI Arrangement at Senior Secondary Levels**

20. The Working Group **supports the continuation of the current flexible MOI arrangement at senior secondary levels.** Having built a sufficient foundation in content subject learning and English language during their junior secondary school years, some CMI students may register an enhancement in overall performance and in English proficiency to be able to learn through English at senior secondary levels. Since schools should, after teaching students for three years, have a clear idea of whether their students have the ability to manage the change in MOI, they would be better informed to make professional judgment on the choice of MOI for their senior secondary students. Moreover, it is believed that the need to sit for public examinations at the end of senior secondary education would induce schools, parents and students to make pragmatic and realistic choices of MOI. Hence, the Working Group proposes that, depending on their students' ability, schools adopting mother-tongue teaching at junior secondary levels may switch to EMI teaching for certain subjects in some classes at senior secondary levels, provided that they meet the prescribed criteria in respect of teacher capability and support measures as set out in paragraphs 12 to 16 above. Schools adopting EMI at junior secondary levels should continue with EMI teaching at senior secondary levels, in order to meet the aspirations of their students for

learning through English.

### **MOI Arrangement for Schools Joining the Direct Subsidy Scheme (DSS)**

21. Having considered the broad direction of mother-tongue teaching, the Working Group is of the view that DSS schools have to meet the prescribed criteria of student ability, teacher capability and support measures if they are to adopt English as the MOI. In operationalizing this principle, having regard to the DSS concept, the Working Group **recommends that the current flexibility be maintained. However, since an immersion mode is more effective in overcoming the barriers of using a second language to learn, the Working Group does not recommend that DSS schools adopt different MOI for different subjects at junior secondary levels.**

22. For transparency, DSS schools should state in their school development plans and annual reports their MOI arrangement and the supporting educational considerations, the implementation strategies and fulfillment of the three prescribed criteria. It is an established practice of the EMB to conduct focus inspections at DSS schools as and when necessary. Should such inspections suggest any MOI practices being inconsistent with a school's professed education philosophy, the EMB would take appropriate measures, including requiring the school to rectify the situation immediately.

### **Capitalizing on Mother-tongue Teaching while Enhancing English Proficiency**

23. The Working Group is of the view that **mother-tongue teaching and enhancement of students' English proficiency can be achieved concurrently.** While implementation of mother-tongue teaching will continue, all secondary schools should endeavour to enhance the English language proficiency of students. In this connection, we are gratified to note the achievements of many schools. There are many ways to enhance students' English proficiency, but in essence, they can be distilled into the following three broad approaches:

- (a) motivating students' interest in learning English;
  - (b) creating an English-rich environment; and
  - (c) promoting resource- and experience-sharing and encouraging professional development of teachers.
24. The community generally supports mother-tongue teaching but yearns for more

exposure to English for students using the mother tongue as the MOI. Since mother-tongue teaching should be more time-efficient, the Working Group proposes that CMI schools **might choose to allocate**, on top of English Language lessons, **no more than 15% of the total lesson time** in S1 - S3 for extended learning activities conducted through English, on condition that the normal teaching and learning of content subjects would not be adversely affected. Possible modes of operation include:

- (a) The extended learning and discussion of any content subject taught in the mother tongue may be conducted in English. However, such extended learning/discussion activities conducted in EMI must not take up more than 15% of the total lesson time of that subject;
- (b) Schools may provide cross-curricular English enrichment programmes;
- (c) Schools may strengthen the bridging programmes to facilitate students' smooth transition from CMI to EMI learning at senior secondary levels.

25. The Working Group is of the view that the Government **should continue with the provision of additional resources for CMI schools. To enhance the flexibility for resource deployment**, the Government should consider giving CMI schools the option of a cash grant in lieu of part or all of the additional teaching posts.

### **Existing Mechanism of Secondary School Places Allocation**

26. The EC proposed in its *Reform Proposals* the following long-term goals in reforming the SSPA mechanism:

- (a) The nine-year basic education will become a coherent stage (a through road) during which pupils should no longer be required to take any high-stake public examination; and
- (b) The allocation bands will be eliminated gradually to remove the labelling effect on schools and pupils.

27. The Government started to implement the short-term SSPA mechanism as from the 2000/01 school year in accordance with the blueprint recommended by the EC. The key features of the short-term SSPA mechanism are the abolition of the Academic Aptitude Test (AAT), the increase of the Discretionary Places (DP) quota and the reduction in the number of allocation bands. In exploring the way forward, the Working Group considers that the following issues require special attention:

- (a) Both parents and schools have made good use of the increased DP quota. The *Reform Proposals* recommends that each student could apply to two secondary schools at the DP stage so as to allow more parental choices. To implement this, we need to work out the operational details.
- (b) At the Central Allocation (CA) stage, the reduction of allocation bands has widened the within-school diversity in student ability in some secondary schools. There are still a considerable number of schools which are at the adaptation and exploratory stage in addressing the issue of student diversity.
- (c) Primary schools generally welcome the abolition of the AAT. However, some primary schools consider the existing scaling mechanism (*viz.* allocation bands being determined by a school's IA results scaled by the AATs of many years ago) as unfair. Many secondary schools also urge the retention of some form of scaling so as to contain the within-school student diversity to a manageable level.

### **Proposals on the SSPA Mechanism**

28. **The Working Group agrees** to the merits of mixed ability learning and the gradual pursuit of the **long-term goal of “no banding and no scaling”** put forward by the EC in its *Reform Proposals*. However, the Working Group **considers that the following pre-conditions must be in place before the long-term goal can be realized:**

#### Primary Schools

- (a) **The majority of students meet the basic competency in Chinese, English and Mathematics when they complete their primary education.**

#### Secondary Schools

- (b) **The majority of secondary school teachers** possess sufficient professional knowledge and skills, as well as the space to develop school-based curriculum and effective teaching pedagogies to **cater for widened student diversity to ensure that most of their students meet the basic competency in Chinese, English and Mathematics when they complete junior secondary education.**

29. However, **the Working Group is of the view that these pre-conditions have yet to be met.** Therefore, in considering the way forward for the SSPA mechanism, the

Working Group reckons that, at the present stage, the existing mechanism can be improved to:

- (a) **provide parents with more choices and encourage diversified development of both students and schools; and**
- (b) **contain the within-school student diversity in secondary schools at a level currently manageable by secondary schools and teachers so that teachers can consolidate their experience in catering for wide student diversity and ensure student learning effectiveness.**

30. On the basis of the above considerations, the Working Group proposes:

(a) DP Stage

- (i) **increasing the DP quota from 20% to 30%;**
- (ii) **ceasing the provision of the “rank order list” to secondary schools; and**
- (iii) **allowing students to apply to two secondary schools.** In implementation, the following three options may be considered:
  - (1) Parents indicate their order of preference to the schools;
  - (2) Parents indicate their order of preference to the EMB only; or
  - (3) Parents indicate their order of preference to the EMB only, and schools may declare in advance that they will not consider second-choice applications.

(b) CA Stage

- (i) **10% of the CA places of every secondary school are set aside for allocation “unrestricted” by school nets.**
- (ii) **A scaling mechanism is retained in order to contain the within-school student diversity in secondary schools within a manageable level, so that teachers can consolidate their experience in catering for wide student diversity and ensure student learning effectiveness. If the community supports the need for scaling, the following options may be considered:**

- (1) to continue with the current scaling mechanism; or
  - (2) to use the existing pre-S1 HKAT as a scaling tool. The average of the results of the two most recently sampled pre-S1 HKATs is taken to derive the instrument to scale primary schools' IA results of the coming cohort of P6 students proceeding to S1. The students will then be divided into allocation bands within each school net according to the scaled results.
- (iii) The three-band system is maintained.

### **Implementation Timetable**

31. If the proposals in this document are accepted, **the soonest the revised SSPA mechanism can apply is to the students who will be admitted to S1 in September 2007. The MOI arrangement can be effected in September 2008 at the earliest** and secondary schools which will have to change their MOI status will be notified by the end of 2007.

### **Inviting Feedbacks**

32. The Working Group welcomes views from all sectors of the community on the above proposals. Comments should be sent to the Secretariat of the Working Group by post, fax or e-mail **on or before 2 May 2005**:

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## Acronyms

AAT	Academic Aptitude Test
CA	Central Allocation
CDI	Curriculum Development Institute
CMI	Chinese-medium instruction
DP	Discretionary Places
DSS	Direct Subsidy Scheme
EC	Education Commission
EMB	Education and Manpower Bureau
EMI	English-medium instruction
GCE O-Level	General Certificate of Education Ordinary Level
HKALE	Hong Kong Advanced Level Examination
HKCEE	Hong Kong Certificate of Education Examination
HKHLE	Hong Kong Higher Level Examination
IA	Internal assessment
IELTS	International English Language Testing System
LPAT	Language Proficiency Assessment for Teachers
MIGA	Medium of Instruction Grouping Assessment
MOI	Medium of instruction
NET	Native-speaking English Teacher
P1/5/6	Primary 1/5/6
POA	Primary One Admission
Pre-S1 HKAT	Pre-Secondary 1 Hong Kong Attainment Test
S1/2/3/4/5/6/7	Secondary 1/2/3/4/5/6/7
SCOLAR	Standing Committee on Language Education and Research
SSPA	Secondary School Places Allocation

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## Chapter 1 Introduction

### Background

1.1 In September 2000, the Education Commission (EC) published *Reform Proposals for the Education System in Hong Kong (Reform Proposals)* which were subsequently accepted by the Government. In respect of the Secondary School Places Allocation (SSPA) mechanism, the Government has implemented the short-term mechanism since 2000. A commitment has also been made to review the progress of implementation in the 2003/04 school year to assess whether the pre-conditions for implementing the post-transition mechanism proposed in the *Reform Proposals* are in place, as well as to decide whether the number of allocation bands and the proportion of Discretionary Places (DP) should be adjusted.

1.2 Separately, the Government started implementing the *Medium of Instruction Guidance for Secondary Schools (Guidance)* in 1998 and also undertook to review its implementation. In the same year, a joint working group, with members from the former Board of Education and the Standing Committee on Language Education and Research (SCOLAR), was set up. In its report of 2000, the working group recommended that the medium of instruction (MOI) arrangement for secondary schools should be considered alongside the review of the SSPA mechanism in the 2003/04 school year, in view of the inextricable links between the two issues.

1.3 The EC hence set up the Working Group on Review of SSPA and MOI for Secondary Schools (Working Group) in July 2003 to take forward the review. The terms of reference of the Working Group are as follows:

- (a) to provide advice to the EC on issues pertaining to the review of the SSPA mechanism and the MOI policy for secondary schools and associated arrangement; and
- (b) to recommend to the EC the long-term SSPA mechanism and MOI arrangement for secondary schools and the related implementation measures.

Membership of the Working Group is at [Annex 1](#).

### Objectives and Methodology of the Review

1.4 The SSPA mechanism affects tens of thousands of students every year, while an appropriate MOI is crucial to effective learning. The Working Group considers that both issues are very important and contentious and should be given careful consideration.

Therefore, some guiding principles for the review should be established at the outset. Members of the Working Group unanimously agreed that **the review should be guided by the interest of students**, and premised on the blueprint mapped out in the *Reform Proposals*, in order to **fulfill the following objectives of the nine-year basic education**:

- (a) **to enable every student to develop to the full his/her individual potential in the domains of ethics, intellect, physique, social skills and aesthetics;**
- (b) **to ensure that students attain the basic standards and encourage them to strive for excellence; and**
- (c) **to encourage students to take the initiative to learn, develop the ability to think and create, and cultivate positive attitudes and values.**

1.5 From July 2003 to August 2004, the Working Group drew reference from a number of local and overseas research studies, met various stakeholders, conducted school visits and classroom observations, and exchanged views directly with frontline teachers and students. The purpose was to better understand the implementation of the present SSPA mechanism and MOI policy at the school level, and to listen to the views of various stakeholders.

1.6 Since the questions involved were more complicated than anticipated, the Working Group considered it necessary to hold more extensive and in-depth exchanges with different stakeholders to ensure that the proposals were as thoroughly thought-through as possible. The review therefore took more time to complete. If the SSPA arrangement as proposed in this document are accepted by the community, they can be implemented for students entering Secondary (S) 1 in September 2007 at the earliest<sup>1</sup>. As for the SSPA in 2006 (for students entering S1 in September 2006), the existing short-term mechanism will continue to apply.

1.7 The Working Group has now completed the review. This document details our proposals on the long-term MOI arrangement for secondary schools and the long-term arrangement for the SSPA mechanism. These **proposals** have been formulated on the basis of the guiding principles outlined in paragraph 1.4 above. **Their essence is as follows:**

- (a) **Since mother-tongue teaching helps enhance learning effectiveness and promote students' high-order thinking skills and all-round development, it best realizes the objectives of education. Hence, continuing to uphold mother-tongue teaching should be the orientation of the MOI arrangement for secondary schools.**

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<sup>1</sup> They are the cohort of students proceeding to Primary (P) 5 in September 2005.

- (b) For the majority of students in Hong Kong, their mother tongue is Chinese with English as a second language. Nevertheless, **irrespective of the language through which they learn, they should enhance their proficiency in both Chinese and English so as to establish a solid foundation for life-long learning.**
  
- (c) **Learning through a second language inevitably creates language barriers, the kind and extent of which may vary from student to student. For most students, such barriers would reduce their interest and effectiveness in learning. Therefore, without prejudice to students' learning of content subjects and whole-person development, and only when schools fulfill the prescribed criteria in respect of student ability, teacher capability and support measures, could they adopt English as the MOI.** Should a school choose to adopt English as the MOI, in principle English should be used in the teaching of all non-language academic subjects. Besides, the school should provide an English-rich immersion environment outside the classroom in order to maximize the benefit of EMI teaching, *viz.* effective enhancement of the English proficiency of students.
  
- (d) The proposed **SSPA mechanism should aim to increase parental choice as far as possible. It should also encourage schools to adopt diversified criteria in DP admission so as to promote all-round development of students.** For instance, due emphasis should be given to the performance of applicant-students in both academic and non-academic areas.
  
- (e) The proposed **SSPA mechanism should help contain the within-school student diversity at a level currently manageable by secondary schools and teachers. The aim is to facilitate secondary schools to develop students' potentials through identifying support or enrichment strategies appropriate to students' abilities and needs.**

1.8 Some people are of the view that the Working Group should deal with the MOI issue from a macro perspective, addressing it comprehensively from primary to university levels and tackling also the use of Putonghua as the MOI. However, the terms of reference of the Working Group are to review the existing MOI policy for secondary schools and to provide advice and make recommendations to the EC on the long-term arrangement. The review therefore focuses on the existing MOI arrangement under the *Guidance*, and will not discuss issues such as the MOI in primary schools, the use of Putonghua as the MOI, or the social and cultural roles of the MOI. In addition, while considering ways to uphold mother-tongue teaching, the Working Group is particularly concerned about enhancing

students' English proficiency. The Working Group considers it equally important that secondary schools using English as the MOI should strengthen the teaching of Chinese and Chinese culture. Nevertheless, since Hong Kong is predominantly a Chinese society with plenty of exposure to Chinese and Chinese culture in daily life, parents are generally more concerned about the English standard of their children. The Working Group acknowledges this concern. Therefore, this document gives a more detailed treatment to ways to enhance students' English proficiency while mother-tongue teaching is practised.

## Chapter 2 Current MOI Policy in Secondary Schools

### Background

2.1 Language is a medium through which students acquire knowledge, analyze issues, think and express themselves. Most people think in the mother tongue. Expression through a second language involves a “translation” process. A number of studies indicate that **students learn best in their mother tongue**. To learn effectively through a second language (i.e. English for students in Hong Kong), students need to have high proficiency in both their first and second languages, as well as a strong learning motivation and ability to overcome the language barriers. In general, the overall academic performance can be used to gauge learning motivation and ability. **If students are not competent enough to learn through the medium of English, not only will the learning effectiveness of the content subjects be undermined, their English proficiency may not be enhanced.** Findings of the relevant studies are summarized at [Annex 2](#). As a matter of fact, most countries use their mother tongues as the MOI.

2.2 In Hong Kong, the Government has been actively encouraging secondary schools to adopt Chinese as the MOI as early as in the 1980s. Schools were then allowed to choose Chinese, English or both (i.e. by subject, by class, by level) as the MOI. Data showed that a great majority of the schools opted for EMI, and many students encountered difficulties in learning. In 1996, the Government accepted the proposals put forward in the *EC Report No. 6*. This marked the explicit enforcement of mother-tongue teaching as the MOI policy and led to the promulgation in 1997 of the *Guidance*. According to the *Guidance*, schools wishing to use English as the MOI must demonstrate their fulfillment of the three prescribed criteria, namely student ability, teacher capability and support measures. The *Guidance* has been enforced as from the 1998/99 school year. As a result, 112 public-sector secondary schools have been allowed to use English as their MOI (EMI schools), while some 300 schools have used Chinese as their MOI (CMI schools). This situation has remained until now. More details of the development of the MOI policy in Hong Kong are at [Annex 3](#).

### Reflections on MOI

2.3 Mother-tongue teaching is based on strong educational considerations and research evidence. It may, however, appear incongruous in the Hong Kong context due to social values and the practical needs for good English proficiency.

### English-medium Teaching and Learning of English

2.4 Hong Kong does have a practical need for a workforce with a high level of English proficiency in order to maintain her competitiveness as an international commercial and

financial centre. Using English as the MOI may enhance students' exposure to English and therefore their English standard. Nevertheless, is this the only or best means to improve students' English proficiency? Is this worthwhile if students' subject learning is adversely affected as a result? Relevant analyses indicate that for most students, the cost outweighs the gain.<sup>2</sup> Therefore, the Working Group holds the view that for the majority of students, **the key to enhancing their English proficiency lies in the teaching and learning of the language (language education), and not necessarily in using the language as the MOI (language in education).**

### Language Environment

2.5 Hong Kong is essentially a Chinese community with Chinese as the mainstream language. Most people use Chinese for their day-to-day communication and most newspapers, magazines, television/radio programmes are also in Chinese. The Working Group does not object to EMI teaching under appropriate conditions since this can facilitate the learning of English. However, this must not compromise students' subject learning. Moreover, the Working Group holds the view that the **effective use of other strategies (such as creating an English-rich environment, making better use of English-medium resources, cultivating students' interest in learning English, etc.) can also increase students' exposure to and encourage the use of English.**

### Transition and Articulation

2.6 Most primary schools adopt mother-tongue teaching with English as a subject. EMI teaching is widely practised in tertiary education in Hong Kong. Switching MOI at a certain point in secondary education is thus a pragmatic need. The question is what the appropriate point is. The answer hinges on student ability, teacher capability and school support. Also pertinent to note is that tertiary education is not the only articulation route for everyone, whereas **basic education is for all school-age children. Hence, the MOI arrangement should cater for the diverse needs of all students.**

2.7 Even from the perspective of university admission, in addition to meeting the basic language requirement, the key criterion for local universities is students' performance in the relevant academic subjects, irrespective of whether they have attempted the examination papers in English or Chinese. **The edge of using CMI to learn academic subjects helps make CMI students more competitive in seeking admission to universities.**

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<sup>2</sup> See paragraph 2.8 and Annex 4.

## Present Situation of Mother-tongue Teaching

2.8 Results of the studies/surveys<sup>3</sup> conducted by the Government and universities, quality assurance inspections conducted by the Education and Manpower Bureau (EMB) after the implementation of the *Guidance*, school visits by the Working Group, and analyses of the results of the Hong Kong Certificate of Education Examination (HKCEE) in 2003 and 2004 all show that mother-tongue teaching is bearing fruit. **The benefits of mother-tongue teaching have been confirmed.** In brief, the benefits include:

- (a) Teaching and learning process
  - (i) Teachers can teach more effectively and in greater depth. Students participate more actively in discussion and teacher-student relationship becomes closer.
  - (ii) Teachers can more fully express themselves and adopt diversified teaching strategies to cater for the diverse needs of students. Interactive modes of teaching, such as games, group activities and discussions, etc., are more effectively conducted in the mother tongue.
  - (iii) Students can comprehend texts and reference materials more easily. They can participate actively in different learning activities (e.g. debates), thus enhancing their analytical power, problem solving skills, as well as exploratory, abstract and high-order thinking.
- (b) Personal growth and learning attitudes
  - (i) Since students find it easier to acquire subject knowledge through mother-tongue teaching, they would develop greater confidence, interest and motivation in learning.
  - (ii) Mother-tongue teaching can embrace more creative, complex, ethical and affective elements, and can thus better facilitate the personal growth of students.

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<sup>3</sup> These studies/surveys include:

- (a) “Survey on Medium of Instruction in Schools” by the SCOLAR in 1999.
- (b) “Evaluation on the Implementation of the MOI Guidance for Secondary Schools: 1999-2002” commissioned by the EMB to Hong Kong Institute of Education Research, The Chinese University of Hong Kong.
- (c) “Questionnaire Survey on the Implementation of Chinese MOI in Schools” conducted in 2002 by the Support Centre for Teachers Using Chinese as the Medium of Instruction, Faculty of Education, The University of Hong Kong.

(c) Academic performance

- (i) Research findings<sup>4</sup> indicate that CMI students perform better in science and social subjects vis-à-vis EMI students of comparable ability. However, their interest, motivation and confidence in learning English are relatively weaker and so is their performance in this subject.
- (ii) The first two cohorts of students affected by the *Guidance* took part in the HKCEE in 2003 and 2004 respectively. As compared to the performance of those who sat for the HKCEE in 2002 (i.e. the last cohort before the implementation of the *Guidance*), our analyses show that:
- there is a notable and continuous increase in the percentage of students in CMI schools obtaining five passes or more.
  - in some language-loaded subjects (e.g. Geography, History, Economics and Biology), the percentages of students obtaining a pass and Grade C or above have demonstrated a notable rising trend when compared to those of the previous year.
  - as for the pass rate in English Language (Syllabus B), among the 200-odd schools switching to CMI in 1998, the respective performance of some 40 schools in the 2003 HKCEE and some 80 schools in the 2004 HKCEE exceeded that of 2002. These trends lend support to our belief that mother-tongue teaching and improving English standard can be achieved concurrently as long as teachers' professionalism, curriculum, teaching strategies and language environment are strengthened.

More detailed analyses of the relevant HKCEE results are at Annex 4.

2.9 The above illustrates the effectiveness of mother-tongue teaching. The Working Group believes that with more experience, richer and better quality Chinese teaching materials and greater consolidation of measures for supporting the learning of English, the academic performance of CMI students will continue to improve.

## **Views of Stakeholders**

2.10 The Working Group gauges from its school visits and discussions with

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<sup>4</sup> Findings of "Evaluation on the Implementation of the MOI Guidance for Secondary Schools: 1999-2002" indicate that, when compared with EMI schools, CMI schools on average can enhance students' achievement in science subjects by 30 percentiles and in social subjects by 20 percentiles.

stakeholders the progressive acceptance of the positive impacts of mother-tongue teaching. **Many frontline educators and parents agree that mother-tongue teaching can help achieve the objectives of education as described in paragraph 1.4 above.** Nevertheless, while recognizing that good performance in academic subjects is the key criterion for university admission, some parents remain worried about the possibility of their children failing to meet the basic English requirement for admission. Some schools/educational bodies and teacher associations consider that the Government should assure quality by strictly monitoring whether schools actually meet the prescribed criteria for adopting EMI teaching and should establish a mechanism for schools to change their present MOI status.

2.11 Some students share the view that performing well in academic subjects is important to university admission. On this, mother-tongue teaching has given them an edge. In respect of the transition from CMI to EMI learning, most students are of the view that an adjustment will be inevitable irrespective of when the switch takes place. However, they do not consider the adjustment difficulty insurmountable. **Some university students consider that CMI teaching at secondary school level has enabled them to build up a solid foundation in academic subjects. Even if they need to switch to EMI learning at the university level, they can adapt to the change within a short time.** Some students opine that, concurrent with the adoption of mother-tongue teaching in secondary schools, the provision of cross-curricular English reading and enrichment programmes to broaden students' exposure to the use of English in different contexts would facilitate greatly their future transition from mother-tongue to EMI learning.

## **Conclusion**

2.12 In sum, the merits of mother-tongue teaching have been progressively vindicated since its implementation six years ago. Some educational bodies (such as the Support Centre for Teachers Using Chinese as the MOI of The University of Hong Kong, the Association of Hong Kong Chinese Middle Schools, etc.) have played a significant role in promoting mother-tongue teaching. They have contributed much to developing teaching resources, helping teachers improve their teaching pedagogy and assessment practices, as well as conducting research studies and documenting experiences. Their efforts have facilitated CMI schools to improve their teaching effectiveness. The Working Group considers that **the way forward is to enable students to learn in greater depth and breadth through the continued adoption of mother-tongue teaching, making steady improvements on the basis of current achievements while also emphasizing the importance of enhancing students' English proficiency.**

## Chapter 3 Medium of Instruction for Secondary Schools: The Way Forward

### Guiding Principles

3.1 **The Working Group concurs with the Government's promotion of mother-tongue (i.e. Chinese-medium) teaching** which can help students build a solid foundation for life-long learning and meet the needs of our socio-economic development.

3.2 Having examined carefully the MOI issues in relation to students' whole-person development and the needs of the community, the Working Group has arrived at the following considerations:

- (a) The Working Group agrees to the views stated in paragraph 2.1 above, **i.e. students need to have greater learning motivation and ability to be able to learn effectively through English (i.e. their second language). In general, the overall academic performance can be used to gauge learning motivation and ability.** Hence, a student's overall academic performance can be used as a basis to assess whether a student has the ability to learn effectively through English.
- (b) A recent study indicates that **at present, at most 40% of the S1 students in Hong Kong may be considered as being able to learn through English (see paragraph 3.6).** For the remaining majority of students, although EMI teaching might help raise their English standard slightly, it would hinder their effective learning of content subjects.
- (c) **Effective learning of English hinges on the learning attitudes, determination and perseverance of students.** Students' English proficiency can be effectively enhanced if students possess a positive attitude, and **schools create a rich language environment** to increase students' exposure to English and motivate them to learn English in authentic contexts. Therefore, in addition to having an advantage in content subject learning, CMI students may also be able to raise their English proficiency through effective language education which adequately prepares them to meet the language requirements for further studies and career development.
- (d) Sustaining an increasingly complex socio-economic society such as Hong Kong demands diverse professional talents. The required standard of English for different professions varies according to the job nature and work language requirements. In some cases, a basic standard of English may

suffice while in some others, a higher level of English proficiency may be required. However, of utmost importance at the basic education stage is to help students build a solid foundation of English for future enhancement according to the different requirements of their future work.

3.3 Based on the considerations outlined above, the Working Group has arrived at the following conceptual framework in charting the way forward for the MOI arrangement:

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

### **Prescribed Criteria for EMI Teaching**

3.4 How to determine and enforce the three prescribed criteria of student ability, teacher capability and support measures for EMI teaching is the key to the implementation of the mother-tongue teaching policy. In implementing the *Guidance* in 1998, student ability was the only one criterion specifically spelt out and consistently applied. The enforcement of the other two criteria was deferred to schools<sup>5</sup>. Student ability was then assessed on the basis of students' internal assessment (IA) results in schools as scaled by the Academic Aptitude Test (AAT). The validity of this assessment mechanism has progressively diminished following the abolition of AAT. The Working Group hence considers it necessary to re-examine the three criteria and their enforcement. The recommendations are set out in the following paragraphs.

#### Student Ability

3.5 Having examined the findings of the relevant studies, the Working Group considers that **only students who possess sufficient learning motivation and ability to be independent and proactive learners would be able to embrace the challenges of, and benefit from, EMI learning. Generally speaking, students with these qualities usually perform better in the overall academic achievement.**

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<sup>5</sup> According to the *Guidance*, the requirements include:

- student ability: an average percentage of not less than 85% of the Medium of Instruction Grouping Assessment (MIGA) Groups I and III students in S1 intake for the past three years (see footnote 6 for a brief description of MIGA);
- teacher capability: based on the school principal's assessment and certification;
- support strategies and programmes: schools are expected to provide students with sound school-based support programmes such as bridging courses.

3.6 In the implementation of the *Guidance* in 1998, the assessment of student ability was based on the Medium of Instruction Grouping Assessment (MIGA)<sup>6</sup>. According to the results of MIGA, about 32.5% of the S1 students were assessed to be able to learn effectively through English (Group I) and another 7.5% were considered to be able to learn in English but they would learn better through the mother tongue (Group III). When selecting a threshold for determining EMI-capable students, the Government adopted a lenient approach by counting not only Group I but also Group III students. Due to changes in the education setting, it is now impossible to verify the validity of the MIGA. In 2004, the Working Group commissioned a study by local academics with expertise in educational measurement to assess the percentage of S1 students in Hong Kong who can learn effectively through English. The Angoff standard setting method, which is widely used in the academic community, was adopted. The study concludes that currently about 32% - 40% of S1 students are able to learn through English. Based on the Angoff study and noting the lenient approach adopted in 1998, **the Working Group takes 40% as the maximum percentage of the current S1 students who are able to learn through EMI** (see [Annex 5](#)). Since this percentage may change in tandem with educational development, the Working Group proposes that this percentage be reviewed as and when appropriate.

3.7 On how to assess specifically whether a student is able to learn effectively through English (i.e. whether they belong to the 40% of students), the Working Group has considered different methods:

- (a) Using a uniform test (similar to the former secondary school admission test) to directly assess the ability of individual students: This should be the most straightforward and fairest way. Yet, it will be a high-stake assessment which will most likely induce drilling and thus distort the primary school curriculum.
- (b) **Adopting the pre-Secondary 1 Hong Kong Attainment Test (pre-S1 HKAT)<sup>7</sup> which is currently conducted annually to scale the IA results of primary students proceeding to S1:** The scaled scores should sufficiently reflect their learning motivation and ability as well as their language proficiency.

3.8 The Working Group suggests adopting the method mentioned in paragraph 3.7(b)

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<sup>6</sup> Group I: able to learn effectively in either Chinese or English.  
Group II: able to learn more effectively in Chinese.  
Group III: able to learn better in Chinese but may also learn effectively in English.

<sup>7</sup> The pre-S1 HKAT is conducted in all secondary schools in July every year to assess the performance of students newly admitted to S1 in Chinese Language, English Language and Mathematics. It also facilitates schools' design of teaching strategy and remedial teaching and support measures. Some secondary schools also use the test as reference for streaming and group teaching purposes.

above because of the following reasons:

- (a) As stated in paragraph 3.2(a) above, students' ability to learn effectively through English should be based on their overall performance as reflected by their school IA results. However, given the disparity in the assessment modes and standards among schools, an objective and uniform scaling instrument is needed to make the IA results of different schools comparable.
- (b) Since the IA results in primary schools form the basis for assessing students' ability to learn through English, it is likely that the prime focus of parents and students will still be the normal learning and teaching in schools. Distortion of the primary school curriculum is therefore less likely.
- (c) Since students will have been allocated S1 school places when they take the pre-S1 HKAT, the test results will not have any bearing on their own allocation results. This would alleviate the pressure of the pre-S1 HKAT test on the students taking it.
- (d) The pre-S1 HKAT is curriculum-based and in line with developing primary students' basic competency in languages and mathematics. Even assuming that some primary schools would, as a result of the adoption of the pre-S1 HKAT for scaling purpose, place greater emphasis on strengthening students' Chinese, English and Mathematics performance, meaningless drilling can still be reduced.
- (e) It has been an established practice for secondary schools to conduct the pre-S1 HKAT annually and make reference to the results in streaming, as well as planning enhancement/support programmes for S1 new entrants. The EMB also samples results for monitoring students' overall performance on a territory-wide basis. The validity and reliability of the test are highly recognized. Schools are familiar with its nature and administration details. Its existing mode of operation will remain unchanged even though it is used also for scaling purpose. In other words, it will not be an additional assessment to schools and students, nor will it therefore entail additional work for schools.

3.9 In respect of implementation, the Working Group holds that:

- (a) The pre-S1 HKAT results should not have any direct bearing on the allocation results of the students taking the test nor the MOI they will use to learn. Using the pre-S1 HKAT results to scale the IA results of the next few cohorts of the primary school can help reduce the incentive for drilling and alleviate

the pressure on students;

- (b) Sampling the pre-S1 HKAT results biennially would not undermine its reliability since past data demonstrate the stability of pre-S1 HKAT results between two adjacent cohorts of the same school. The sampled results can reliably serve the dual purposes of scaling and monitoring students' performance on a territory-wide basis.

In sum, the Working Group **proposes to collect samples of the pre-S1 HKAT results biennially, and to take the average of the results of the two most recently sampled pre-S1 HKATs to derive the instrument to scale primary schools' IA results (the second term of P5 and the first and second terms of P6) of the coming cohort of P6 students proceeding to S1.** For example, the average of the sampled results of pre-S1 HKATs of 2006 and 2008 can be used to scale the IA results of the two cohorts of P6 students proceeding to S1 in 2009 and 2010. Similarly, the average of the results of pre-S1 HKATs of 2008 and 2010 can be used to scale the IA results of the two cohorts of P6 students proceeding to S1 in 2011 and 2012. Similar processes repeat thereafter. The scaled results of all P6 students will be put into a pecking order. Based on the findings of the study referred to in paragraph 3.6 above (Angoff standard setting method), **the top 40% of the students will be taken as having the ability to learn through English (EMI-capable students).**

3.10 We must emphasize that students of comparable ability learn more effectively through the mother tongue than English. To learn through English, students have to overcome the language barriers. Generally, students with stronger learning motivation and higher learning ability are relatively better placed to overcome such barriers, hence minimizing the adverse effect of EMI teaching on their learning outcomes.

3.11 There is also a need to determine the requisite percentage of EMI-capable students to render a school eligible for adopting EMI teaching. The Working Group considers that while it is not realistic to require all students of a school/class to be EMI-capable, teaching will become difficult if the percentage is set too low. Drawing reference from the experience of the school sector in implementing the *Guidance* in these six years and their views on the way forward, the Working Group considers the existing requisite percentage of 85% acceptable and hence proposes to continue with the 85% requisite requirement. **Should EMI teaching by class be permitted, such a class should have at least 85% of its students being EMI-capable. Should schools be bifurcated into EMI and CMI schools, then an EMI school should have at least 85% of its S1 intake being EMI-capable.**

#### Teacher Capability

3.12 To be able to communicate subject contents effectively, teachers must possess, in

addition to subject and pedagogical knowledge, sufficient proficiency in language. The Working Group trusts that teachers employed by schools possess the subject knowledge and mastery of the pedagogies. Therefore, in assessing teachers' capability for EMI teaching, the Working Group focuses mainly on their English proficiency. The basic requirement is that **“teachers should be able to communicate the subject content to students intelligibly and that their use of English should have no adverse impact on students' acquisition of the English language”**.

#### *Basic Requirement*

3.13 The Working Group has considered different options to assess teachers' capability to teach through English. These include:

- (a) to continue with the practice as laid down in the *Guidance* whereby teachers' capability is assessed and certified by their school principals. However, the standard adopted would inevitably vary among schools. It is difficult to ensure an objective, consistent and reasonable assessment.
- (b) to develop an independent assessment for EMI teachers by adapting the existing Language Proficiency Assessment for Teachers (LPAT) (e.g. by adjusting the difficulty level and adding some language requirements relating to different content subjects). However, as the existing LPAT is designed for language teachers, the design and rationale may not be applicable to non-language teachers even when the test details have been adapted. Besides, the development of such an assessment would be complex and the Working Group does not therefore consider this feasible in the near future.
- (c) to make reference to the results of existing English language public examinations and to provide multiple avenues for teachers to meet the requirement. In this regard, the Working Group is of the view that **using the HKCEE results to set the requirement should be a reasonable and widely accepted approach, given that the HKCEE is a well established and widely recognized public examination and that most of our teachers have sat for this examination. This would also help alleviate undue pressure on teachers.**

3.14 In setting the basic requirement, the Working Group has consulted academics and major stakeholders (including school councils, principals and frontline teachers). The general view is that teachers obtaining a Grade C or above in English Language (Syllabus B) in the HKCEE could be considered as having attained the basic capability in the use of English (e.g. vocabulary, usage and expression) to meet the requirement of being “able to communicate the subject content to students intelligibly, and that their use of English should

have no adverse impact on students' acquisition of the English language". Hence, the Working Group proposes to **anchor the requirement at Grade C or above in English Language (Syllabus B) of the HKCEE or its equivalent.**

3.15 **Equivalent qualifications** refer to qualifications having been formally evaluated and recognized as equivalent to or higher than the above-stated basic requirement. At present, these qualifications **include: (a) band 6 or above in the International English Language Testing System (IELTS)<sup>8</sup>; (b) a pass or above in English in the General Certificate of Education Ordinary Level (GCE O-Level) (Overseas) Examination<sup>9</sup>.** As for further possible equivalent qualifications, the Working Group understands that the SCOLAR will conduct relevant studies. Moreover, teachers obtaining **a Grade D or above in Use of English in the Hong Kong Advanced Level Examination (HKALE)<sup>8</sup> or passing the Language Proficiency Requirements (English)** can be considered as having met the requirement for EMI teaching.

3.16 The Working Group also notes that some teachers possess qualifications of the Hong Kong Higher Level Examination (HKHLE). However, since that examination has been long-defunct, it is not possible to conduct a study on its equivalent with the HKCEE. The Working Group considers that since the HKHLE was a public examination sat by S6 students, the standard should be somewhere between that of the HKCEE and HKALE. The Working Group therefore proposes that teachers obtaining **a Grade C or above in English Language in the HKHLE** be considered as having met the requirement as set out in paragraph 3.14 above.

3.17 In principle, all teachers have to attain one of the qualifications stated in paragraphs 3.14 to 3.16 above in order to be eligible to teach through EMI. **For serving EMI teachers<sup>10</sup> who have not attained any of the qualifications, they may have their capability certified in one of the following ways:**

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<sup>8</sup> In a recent research conducted by the Hong Kong Examinations and Assessment Authority, random and representative samples from candidates taking the HKALE (2004) and HKCEE (2004) were selected respectively to sit for the IELTS. Results showed that candidates who had got a Grade C in English Language (Syllabus B) in the HKCEE obtained an average overall band score of 6.22 in the IELTS (ranging from 5.92 to 6.40); while those who had got a Grade D in Use of English in the HKALE obtained an average IELTS overall band score of 6.28 (ranging from 6.03 to 6.50).

In view of the above results, the Working Group recommends that teachers obtaining a Grade D or above in Use of English in the HKALE or band score of 6 or above in the IELTS can be regarded as having met the basic requirement for EMI teaching.

<sup>9</sup> Based on regular scrutiny by the former University of Cambridge Local Examinations Syndicate (UCLES), a Grade C or above in English Language (Syllabus B) of the HKCEE has been recognized as equivalent to a pass in English in the GCE O-Level (Overseas) Examination.

<sup>10</sup> "Serving EMI teachers" refer to teachers\* who have used English as the MOI to teach one or more subjects in not less than two school years, as calculated from the implementation of the *Guidance* in the 1998/99 school year to the end of August 2005, or teachers\* who have used English as the MOI to teach one or more subjects in the 2004/05 school year and will continue to teach through English throughout the 2005/06 school year (\*including serving teachers in EMI and CMI schools).

- (a) **to obtain the relevant qualifications in English** (i.e. one of the qualifications set out in paragraphs 3.14 to 3.15 above) **within two years from the 2005/06 school year**; or
- (b) **to opt for classroom observation by subject experts and language experts appointed by the EMB** to assess their overall capability to use English in content subject teaching, *viz.* whether they are able to communicate the subject content intelligibly, and that their use of English has no adverse impact on students' acquisition of the English language<sup>11</sup>.

The Working Group understands that there may be diverse views in the community on the above requirement of EMI teachers' language proficiency, but considers its proposals a pragmatic and acceptable starting point. Depending on the progress in implementation, the requirement can be further reviewed as and when necessary.

#### *Continuous Professional Development*

3.18 The Working Group appreciates that **teachers should keep abreast of the latest developments in education** and strive for professional excellence. For EMI content subject teachers, their continuous professional development should include elements relating to the use of English as the MOI. The Working Group proposes that **for every three years, these teachers should accumulate a minimum of 15 hours of EMI-related continuous professional development activities**<sup>12</sup>. These include, for instance, organizing or participating in seminars relevant to EMI teaching, attending English-medium courses relating to the subjects they teach, etc.

3.19 The Working Group considers that the above requirements should apply to all EMI subject teachers at both junior and senior secondary levels, irrespective of whether the distinction between EMI teaching and CMI teaching be made on a between-school bifurcation or a within-school class streaming approach.

#### Support Measures

3.20 The Working Group is of the view that secondary schools using English as the MOI should purposefully and **strategically provide a language environment conducive to learning English**. These include, for instance:

- (a) strengthening the teaching and learning of English as a subject with a view to

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<sup>11</sup> Application for classroom observation may be submitted in the 2005/06 school year, if the proposal is accepted.

<sup>12</sup> These 15 hours' professional development can be included in the framework for teachers' continuing professional development, depending on the circumstances and wish of the school/teacher.

enhancing students' English proficiency, which would in turn better facilitate them to learn other subjects through English;

- (b) creating an English-rich environment to increase students' exposure to English inside and outside the classroom<sup>13</sup>; and
- (c) devising well designed bridging programmes to help students switch from CMI to EMI learning.

3.21 Since different schools have different backgrounds, abilities of student intake, directions of school development and strategies of resource deployment, it is not appropriate to adopt a one-size-fits-all approach to assess the adequacy of schools' support measures for EMI teaching. Support measures, being student-oriented and school-based, should be assessed and monitored under the prevailing quality assurance framework and self-evaluation mechanism.

3.22 The Working Group proposes that **secondary schools intending to adopt English as the MOI should set out the related support strategies and specific measures in their school development plans and annual school reports** for information to students, parents and other members of the public. **Based on the results of schools' self-evaluation, external school review and/or quality assurance inspections**, the EMB could then **assess, qualitatively and quantitatively, whether adequate support measures are in place in the schools concerned.**

### **MOI Arrangement at Junior Secondary Levels**

3.23 As for the MOI arrangement at the school level, the Working Group must reiterate that:

- (a) At the stage of basic education, mother-tongue teaching is in the best interest of the students. Students learn most effectively through mother-tongue teaching, irrespective of their learning ability.
- (b) Students must possess the necessary ability to learn through English before they can benefit from EMI learning.
- (c) To ensure student learning effectiveness, schools have to meet the three prescribed criteria before choosing to adopt English as the MOI (see paragraphs 3.5 to 3.22).

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<sup>13</sup> Schools should create an English-rich environment inside and outside classroom, e.g. using English in announcements, assemblies, extra-curricular activities, notices, etc.

3.24 The Working Group regards it as a fundamental principle that the proposed options should be consistent with the promotion of mother-tongue teaching and all-round development of students. At the same time, the teaching and learning of English should be strengthened by creating a language rich environment and encouraging students to capitalize on daily life situations to listen, speak, read and write more, thus enhancing their ability to comprehend and use English. Students' exposure to subject-related English can be increased through cross-curricular English enrichment programmes, on-line resources, English books and magazines, etc. These learning experiences will help not only to lay a strong foundation for mastering English, but also extend English beyond the textbooks to real-life application.

3.25 As regards the MOI arrangement for public-sector secondary schools, the Working Group has considered two main options, namely streaming of MOI within-school (the so-called within-school approach) and streaming of MOI between schools (the so-called bifurcation approach):

#### Option (1): Within-School Approach

3.26 Under the within-school approach, schools may use different MOI in different classes, subjects or grade levels. In other words, a school may stream students by ability into CMI and EMI classes, have some subjects or grade levels taught in Chinese and some, in English, or even streaming for EMI teaching by grade level, class and subject concurrently.

3.27 Some schools may have fully met the three prescribed criteria for EMI teaching, and wish to adopt EMI teaching save for a few content subject(s) which they wish to be taught through Chinese. The Working Group notes from discussions with students and parents that EMI learning is preferred primarily for its increased exposure to English so as to enhance English proficiency, even though they realize that EMI learning requires greater efforts and risks compromising the effectiveness of content subject learning. CMI teaching for a few academic subjects will reduce students' exposure to English and is thus not in line with the general aspiration of the students and parents. Also, the benefits of EMI teaching cannot be maximized.

3.28 MOI differentiation by grade levels will invite the question of whether a standardized assessment mechanism is needed to assess the EMI-capability of students before they progress to S2 or S3. If so, students will be subject to external assessment pressure. If not, this will undermine the enforcement of the student EMI-capability criterion as different schools may use different assessment methods and standards. More importantly, regardless of whether the assessment is school-based or territory-wide, the assessment will be high-stake which will risk making the junior secondary education overly

assessment-driven and thus inconsistent with the aims of the Education Reform.

3.29 Thus, in considering the within-school approach, the Working Group has focused its deliberations on streaming by class.

3.30 The Working Group understands that, in theory, MOI streaming by class has the following attractions:

- (a) It allows greater flexibility to schools. Schools may stream students by ability and place them in MOI-appropriate classes. This can help reduce “MOI-mismatch” of students and facilitate the provision of support measures to address the specific and diverse needs of students.
- (b) The arrangement apparently helps eradicate the prevailing labelling between CMI and EMI secondary schools since more schools will practise EMI teaching in varying degrees. Parents may also, as a result, seem to have more choices.
- (c) It meets the aspiration of some parents and members of the public for more schools to be permitted to practise EMI teaching.

3.31 However, from a macro perspective, this approach fails to promote mother-tongue teaching and the aims of basic education. There are also difficulties in implementation. The approach warrants more sophisticated and careful examination of its likely repercussions. These are outlined below:

- (a) Aggravating the labelling effect – Due to historical evolution that traditional EMI schools are usually well sought after by parents and hence enjoy better intake ability, EMI schools are often simply taken as “good” schools. The within-school approach could induce schools to seek to operate as many EMI classes as possible. The number of EMI classes operated in a school might thus be conveniently used as an “indicator” of how “good” a school is. Some educators are concerned that people may **devise a more elaborate school labelling schema** by drawing up a “league table” of schools according to the number or proportion of EMI classes they operate, i.e. with full adoption of EMI being regarded as grade one schools, and the grade drops in tandem with the decreasing number or proportion of EMI classes, with eventually, schools fully adopting mother-tongue teaching being misinterpreted as the bottom grade schools. It would, in effect, **create multiple labelling among schools**. Besides, a within-school approach also induces labelling within a school between students in CMI and EMI classes, thus leading to likely negative self-concept of CMI students. The

**within-school labelling effect** would hinder the development of a school culture which emphasizes mutual respect and care among schoolmates.

- (b) Undermining schools' overall development – Given the community's prevailing preference for EMI teaching and the continued decline in student population, schools would have to take market forces into account when making their MOI decisions. Some school principals point out that **the strong effects of MOI labelling would induce schools to operate as many EMI classes as they possibly can** as well as to allocate resources and efforts to EMI teaching in a lopsided manner. This would be unfair to students of CMI classes. Furthermore, this could impede a school's development in a way that is congruent with its education philosophy. Besides, some schools that meet the three prescribed criteria for EMI teaching but have so far been upholding mother-tongue teaching would be under immense pressure to operate some EMI classes even though this may be contrary to their education philosophy.
- (c) Increasing pressure on students – If schools are allowed to use different MOI in different classes, they will probably need to make provision for some students to switch from CMI to EMI classes in S2 and S3 or vice versa in accordance with their ability and learning needs. If schools conduct annual assessments to determine students' switch between EMI and CMI classes, this may **distort the junior secondary curriculum and oblige some students to face repeated switches between CMI and EMI teaching during the three years of junior secondary education**. Not only would this exert unnecessary pressure on students, this would also adversely affect their learning effectiveness.
- (d) Aggravating pressure on teachers – In their pursuit of more EMI classes, schools may find it prudent to require content subject teachers to obtain the qualifications for EMI teaching as mentioned in paragraphs 3.14, 3.15 or 3.17 as early as possible, thus aggravating the pressure on teachers. Moreover, most of the teachers with whom the Working Group met have expressed concern about the workload implications of operating EMI and CMI classes at the same grade level as a result of the need to **prepare teaching materials and examination papers in both English and Chinese, as well as to devise different teaching pedagogies and support measures for different MOI classes**.

## Option (2): Bifurcation Approach

3.32 The Working Group is aware of the downside of the bifurcation approach:

- (a) It gives little flexibility for secondary schools to decide on its own MOI, taking into account the ability of students and the wishes of parents.
- (b) It continues to divide schools into the EMI and CMI categories. Since EMI schools are much sought after by some parents, the perception of EMI schools as “good” schools would not change, thus failing to reduce the labelling effect on CMI schools and the negative self-concept of students in CMI schools.

3.33 However, after careful consideration, the Working Group finds the bifurcation approach more educationally sound and desirable, as it supports the direction of our education development and better caters for the overall interest of students. The key considerations are summed up as follows:

- (a) Greater space for development of CMI schools – Under the bifurcation approach, public-sector schools will continue to be predominantly CMI schools. **With the same MOI, all CMI schools will have a “fair competition”.** They can develop their own characteristics in school-based curriculum, student support, diversified extra-curricular activities and home-school cooperation, etc. They can also capitalize on the relatively greater space for development by focusing on teaching pedagogy improvements and strengthening of language education. Notwithstanding the decline in student population, they can still appeal to parents on the basis of their education philosophy, characteristics and teaching effectiveness.
- (b) Avoiding within-school labelling – Although the bifurcation approach may not be able to eliminate between-school labelling, it can **avoid the within-school labelling between classes of different MOIs at the same grade level.** It will also avoid possible arguments between schools and parents on placement of students to different MOI classes. When compared to the within-school approach, the bifurcation approach is better placed to help foster a school culture marked by unity and harmony. Parents will also have a clear expectation of a school’s MOI when making school choices for their children, and would hence avoid having any “false hope” as might occur should within-school MOI streaming be adopted.
- (c) More room for teachers – Teachers need not prepare bilingual versions of

teaching materials and examination papers for classes of different MOIs. They would therefore **have more time to cater for other learning needs of the students, pursue professional development and enhance teaching effectiveness.**

- (d) Enabling a stable development of education – The bifurcation approach can **provide schools with a more stable environment and greater space** to realize their education vision and implement the Education Reform measures, thus contributing to the stability of our education system.

3.34 The Working Group understands that the bifurcation approach would be unlikely to reduce the current labelling between CMI and EMI schools within a short time. Nevertheless, the between-school labelling will still exist and even be aggravated if the within-school approach is adopted. After weighing the pros and cons of the two approaches and **with student effective learning and all-round development as the overriding concern, the Working Group proposes to maintain the current bifurcation approach under which most of our secondary schools would practise mother-tongue teaching. This would help promote the development of mother-tongue teaching which has begun to bear fruit. At the same time, English language education should be strengthened so that students in both CMI and EMI schools can attain good English proficiency.**

### **Review Mechanism**

3.35 **To ascertain whether EMI schools still fulfill the three prescribed criteria and to allow aspiring and “EMI-qualified” CMI schools to apply to become EMI schools,** the Working Group also proposes to introduce a review mechanism at regular intervals. The Working Group does not favour a short review cycle lest this should deprive schools of a stable MOI environment for further development. The Working Group regards that **a review cycle of six years** would be appropriate.

3.36 As the percentage of EMI-capable students in a school is one of the factors determining its MOI status, the Working Group proposes assessing the percentage of S1 EMI-capable students in each secondary school annually on the basis of the method mentioned in paragraph 3.9 above. The percentages obtained in the first to fourth years of the six-year review cycle will be used for the secondary school’s reference only, whereas the average percentage of the fifth and sixth years will be used to decide whether the school has satisfied the criterion of student ability for EMI teaching. As to the other two criteria, namely teacher capability and support measures, schools wishing to use English as the MOI should prove that the two criteria have been fulfilled when submitting an application to the EMB.

## Operation of the First Cycle of Review

3.37 The Working Group proposes implementing the new MOI arrangement for secondary schools starting with their S1 classes from the 2008/09 school year and progressing each year to a higher grade level. CMI schools wishing to use English as the MOI should submit their applications before the end of the 2006/07 school year. They should also make sure that the two criteria of teacher capability and support measures have been met. As for the student ability criterion, the results of the 2006 pre-S1 HKAT and those of the AAT of 1999/2000 will be used to scale the primary school IA results of the S1 intake of 2007 for calculating the percentage of EMI-capable students in each secondary school. Schools will be notified of the result of their applications at the latest by the end of 2007 (i.e. before the DP process for the S1 intake of the following school year commences). Similarly, if an existing EMI school no longer satisfies the three prescribed criteria, it will be notified by the end of 2007. It will have to switch to CMI teaching starting with their S1 classes from the 2008/09 school year and progressing each year to a higher grade level.

3.38 To give secondary schools an idea of the ability of their students under the new criterion and to allow them to prepare for possible changes in MOI, the Working Group proposes to provide them with mock information on their students' ability. The information will be derived by using the 2005 pre-S1 HKAT and the AAT of 1999/2000 to scale the primary school IA results of S1 intake in September 2005 and 2006.

### **MOI Arrangement at Senior Secondary Levels**

3.39 The Working Group notes the growth potential of students and in particular, the malleability of junior secondary students. Having built a sufficient foundation in content subject learning and English language during their junior secondary school years, some CMI students may register an enhancement in overall performance and in English proficiency to be able to learn through English at senior secondary levels. Hence, the Working Group **supports the continuation of the current flexible MOI arrangement at senior secondary levels, viz. CMI schools may switch to EMI teaching in certain subjects in some classes at senior secondary levels.**

3.40 The Working Group considers that the requirements in respect of student ability, teacher capability and school support measures should apply to junior and senior secondary levels alike. In respect of student ability, the Working Group does not recommend introducing any new external assessment though it favours adopting the same principles as for junior secondary levels. In other words, students' overall academic performance as reflected in the IA results should form the basis of consideration, and the existing assessment tools of schools (such as examinations conducted as a normal part of the curriculum) should be used so as to avoid creating additional and unnecessary pressure on students. Since

schools should, after teaching students for three years, have a clear idea of whether their students have the ability to manage the change in MOI, they would be better informed to make professional judgment on the choice of MOI for their senior secondary students. Moreover, we believe that the need to sit for public examinations at the end of senior secondary education would induce schools, parents and students to make pragmatic and realistic choices of MOI.

3.41 Since the support provided by schools impacts directly on student learning and students would resort to support by teachers and schools when facing difficulties in transiting from CMI to EMI learning, the Working Group considers that **the two criteria of teacher capability and school support measures as stipulated in paragraphs 3.14 to 3.18 and 3.20 to 3.22 respectively should be applied to senior secondary levels alike.**

3.42 CMI schools intending to switch to EMI for certain subjects or in some classes at senior secondary levels are required to include in their school development plans and annual reports details of their MOI arrangement, including ways to assess students' ability to learn effectively through EMI and whether they meet the criteria of teacher capability and support measures. The EMB may conduct focus inspections to assess the appropriateness of the MOI arrangement adopted by schools.

3.43 Schools adopting EMI at junior secondary levels should continue with EMI teaching at senior secondary levels<sup>14</sup>, in order to meet the aspirations of their students for learning through English.

### **MOI Arrangement for Schools Joining the Direct Subsidy Scheme (DSS)**

3.44 To promote diversity in the education system, DSS schools are allowed greater flexibility in curriculum, resources allocation, etc. However, DSS schools are subject to greater market forces as they need to recruit students. (Though some DSS schools participate in the SSPA, the principle of “non-allocation” applies, *viz.* students will not be allocated to the DSS schools that they have not selected.) Thus there may be greater cross-year fluctuations in student intake in both number and quality. DSS schools therefore have to respond quickly through curriculum adaptation, changes in teaching strategies and MOI in order to meet the needs of students.

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<sup>14</sup> The Working Group considers that EMI schools should adopt EMI teaching for Liberal Studies, a proposed compulsory subject under the new academic structure for senior secondary education. However, it also recognizes that most of the teaching materials/resources for some modules and themes may be available in Chinese only. The Working Group therefore proposes that the Curriculum Development Council should decide if EMI schools should be given the option to adopt CMI teaching for certain modules/themes after taking into account the following conditions:

- The majority of the teaching materials of the modules/themes concerned are available in Chinese only;
- Students are given the option to attempt public examinations on these modules/themes through Chinese or English.

3.45 Having considered the broad direction of mother-tongue teaching, the Working Group is of the view that DSS schools have to meet the prescribed criteria of student ability, teacher capability and support measures if they are to adopt English as the MOI. In operationalizing this principle, having regard to the DSS concept, **the Working Group recommends that the current flexibility be maintained<sup>15</sup>. However, since an immersion mode is more effective in overcoming the barriers of using a second language to learn, the Working Group does not recommend that DSS schools adopt different MOI for different subjects at junior secondary levels.**

3.46 For transparency, DSS schools should state in their school development plans and annual reports their MOI arrangement and the supporting educational considerations, the implementation strategies and fulfillment of the three prescribed criteria (e.g. details on the present situation and future development of student ability, teacher capability, support measures, proposed ways to evaluate the MOI adopted and the effectiveness). In addition, it is an established practice of the EMB to conduct focus inspections at DSS schools as and when necessary. Should such inspections suggest any MOI practices being inconsistent with a school's professed education philosophy, the EMB would take appropriate measures, including requiring schools to rectify the situation immediately. The Working Group proposes that this mode of monitoring should be maintained.

### **Capitalizing on Mother-tongue Teaching while Enhancing English Proficiency**

3.47 English is an international language. Living in an international metropolis such as Hong Kong, we need to have a good command of English to communicate with the rest of the world. English proficiency of our younger generations is also crucial to enhancing Hong Kong's competitiveness in an economy increasingly marked by professionalization and globalization. As one of the most widely used languages of the world, English opens the door to timely and first-hand access to information that knows no boundary. This power of access to information broadens horizon, enables dynamic construction of knowledge and facilitates future education and career endeavours by the students.

3.48 Enhancing students' English proficiency must therefore be one of the priority items on the agenda of school education. The Government has invested significant resources to support students' learning of English (see [Annex 6](#)) and in this connection, we are gratified to note the efforts and achievements of many schools. There are many ways to enhance students' English proficiency, but in essence, they can be distilled into the following three broad approaches:

- (a) differentiating and diversifying curriculum, assignments and other learning

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<sup>15</sup> For details, see Circular Memorandum No. 532/99 issued by the EMB on 22 September 1999.

activities according to the needs and abilities of students, and adopting student-centred and flexible teaching pedagogies with teaching resources more related to their daily life, with a view to arousing students' interest in learning English, enhancing their communication skills and independent learning ability;

- (b) creating an English-rich environment so that students can be extensively exposed to English through daily learning activities, for instance:
  - (i) making effective use of the facilities and resources in schools, such as posting English notices and assignments/projects of the students on campus, making announcements/broadcasts in English, etc.;
  - (ii) encouraging the use of reference materials from various sources in content subject learning and project learning, especially resources on the Internet (most of which are in English);
  - (iii) conducting multifarious English activities to support the teaching and learning of English, e.g. debate, public speaking, drama, webpage design, etc. during lunch time or after school;
  - (iv) nurturing students' good reading habits and encouraging them to share reading experiences;
- (c) promoting resources- and experience-sharing and encouraging professional development of teachers.

3.49 **In removing the language barriers to teaching and learning, mother-tongue teaching should be more time-efficient, especially for the more able students. Teachers may make use of the “gained” time to conduct extended teaching activities,** enhance the depth and breadth of subject teaching, further develop higher-order thinking and promote affective and cultural development of students. In addition, the advantages of mother-tongue teaching would become even more palpable when the proposed new senior secondary academic structure, with a more flexible and diversified curriculum providing for extended modules and electives, is implemented.

3.50 **Some people are concerned that, as a result of their reduced exposure to English, CMI students may suffer from lower interest, motivation and confidence in learning English. The Working Group recognizes that more exposure and application is important to effective learning of the target language. It is therefore desirable for CMI students to have more exposure to, and application of, English while benefiting from mother-tongue teaching.** Chinese and English learning resources abound in the electronic age. Mother-tongue teaching does not imply that CMI students should confine

themselves to Chinese resources; they should also make reference to materials expressed in English. Similarly, EMI students should also draw reference from Chinese materials to enrich their learning experience. As English is an international language, plenty of useful reference materials such as books, magazines, websites and electronic media are available in English. Secondary school students should not see English only as one of the academic subjects; instead, they should regard English as a learning tool for direct access to, and comprehension of, information, culture and the latest knowledge worldwide.

3.51 The Working Group further proposes that, **without prejudice to students' learning of content subjects**, CMI schools may implement, strategically and systematically, extended learning activities in the classrooms, with a view to enhancing students' exposure to and use of English. Specifically, **CMI schools may allocate**, on top of English Language lessons, **no more than 15% of total lesson time in S1 - S3 for extended learning activities conducted through English**<sup>16</sup>. The Working Group does not consider it necessary to stipulate any student EMI-capability requirement for such extended learning activities, since subject content learning will not be affected. In providing students with a risk-free environment for enhanced English exposure, this could help boost their self-efficacy and eventually, their English proficiency. As such, **mother-tongue teaching and high English proficiency can be achieved concurrently**. Should this proposal be adopted, CMI students' exposure to English during lesson time may be up to one third of the total<sup>17</sup>.

3.52 Since mother-tongue teaching enables students to learn more efficiently, provided that the normal teaching and learning of content subjects would not be adversely affected, CMI schools may flexibly capitalize on the time-efficiency of mother-tongue teaching for extended learning as follows:

- (a) Teaching subject contents – Schools may, having regard to their characteristics and the needs of their students, choose to conduct the extended learning activities in the mother tongue, thus enabling a deeper and broader treatment of the curriculum. Such may include, for instance, exploring daily life issues or socially controversial topics through different learning activities, so as to sharpen students' capacity for creative and analytical thinking as well as decision-making faculty – attributes which facilitate students to construct knowledge on their own. Alternatively, teachers may choose to allocate an

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<sup>16</sup> The traditional learning in the subject of English focuses on the use and structure of the language, including grammatical rules, skills of usage, etc. In the present proposal, the focus is on enhancing students' use of English as a learning tool. Since students have mastered the core elements of the subject content and the relevant concepts, they would be able to be engaged in extended learning with the use of English in subject or cross-curricula contents.

<sup>17</sup> At present, CMI schools usually have about 15%-20% of the lesson time allocated to English Language. Together with the proposed 15% for English extended learning, it may add up to 30%-35%.

appropriate percentage of lesson time (not exceeding 15%) for conducting extended learning through EMI.

- (b) Possible modes of operation may include:
- (i) Provided that the normal progress of teaching and learning of the content subject through the mother tongue is not affected, the extended learning or discussion of these content subjects may be conducted in English. However, such extended learning/discussion activities conducted in EMI must not take up more than 15% of the total lesson time of that subject;
  - (ii) Schools may provide cross-curricular English enrichment programmes. In this connection, schools may draw reference from and adapt the EMB-commissioned enrichment modules developed by The Hong Kong University of Science and Technology<sup>18</sup>;
  - (iii) Schools may strengthen the bridging programmes to facilitate students' smooth transition from CMI to EMI learning at senior secondary levels.

Schools should include the relevant arrangement in their school development plans and annual reports to facilitate regular self-evaluation on the effectiveness of such measures. The EMB will disseminate schools' good practices, or provide support to individual schools where necessary.

3.53 The introduction of the extended learning component aims to give CMI students an experience of using English as a learning tool. Its content should be designed flexibly to suit the different abilities and aptitudes of the students. Since the progress and effectiveness of content subject learning is assured by mother-tongue teaching, the Working Group favours the relaxation of the criterion of student ability even though such extended learning may be conducted through English.

3.54 Since extended learning conducted in English may involve the learning of both the content subjects and English, content subject teachers should work in close collaboration with English Language teachers to systematically expose students to the English vocabulary, syntax and language genre of particular subject disciplines. **As teacher quality directly affects students' learning effectiveness, the Working Group is inclined to require the teachers concerned to meet the qualifications as proposed in paragraphs 3.14 to 3.18 above.**

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<sup>18</sup> The English enrichment programme developed by the research team of The Hong Kong University of Science and Technology consists of 60 modules suitable for S2 and S3 levels. It was tried out in 14 CMI schools and experience sharing sessions have been organized by the EMB for other schools. The modules have been uploaded onto the EMB website.

3.55 Currently, CMI schools are entitled to have one to five additional English teacher(s), depending on the number of classes involved<sup>19</sup>. **The Working Group considers that the Government should continue to provide additional resources to CMI schools, and proposes that the Government should explore to enhance the flexibility for resource deployment by giving existing CMI schools the option of a cash grant in lieu of part or all of such additional teaching posts.** The intention is to enable schools to adopt different modes of support to help raise students' English proficiency, e.g. development of EMI-related teaching resources, strengthening professional development of teachers, collaboration or experience sharing with local or overseas schools/tertiary institutions, etc. In the long run, the Government's provision of additional resources in support of mother-tongue teaching should follow this direction of enhanced flexibility in deployment. It therefore follows that new CMI schools should be given the cash grant option only.

3.56 It is imperative that, irrespective of their MOI, students should improve their English standard. Creating an environment conducive to the learning of English is the responsibility of not only the schools, but also the society as a whole, from parents, community organizations, and mass media to the Government. Specific proposals in this regard have been set out in *Action Plan to Raise Language Standards in Hong Kong* published by the SCOLAR in June 2003. The Working Group proposes that, in line with this whole community approach to promotion of English proficiency, the SCOLAR should conduct further studies, taking into account the latest development of the MOI policy for secondary schools.

## Conclusion

3.57 The Working Group considers that **under the broad direction of the continued implementation of mother-tongue teaching, English language education should be strengthened, with more opportunities for CMI students to be exposed to and apply English** so as to adequately equip students to meet future academic and career challenges.

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<sup>19</sup> According to the Code of Aid for Secondary Schools, schools in which Chinese is fully used as the MOI in S1 to S3 are provided with additional English teachers. The number of such teachers is assessed on the basis of the number of classes in S1 to S3: one additional teacher for schools with 14 or below classes, two for 15 to 23 classes, three for 24 to 29 classes and four for 30 to 35 classes.

For schools continuing to use Chinese as the MOI in S4 and S5, they will be provided with another additional English teacher according to the total number of classes at these two levels and their percentage of CMI teaching. (Remarks: Schools with a total of four or more S4 and S5 classes and the CMI teaching percentage is equal to 25% or more; or schools with less than four S4 and S5 classes in total and their CMI teaching percentage is 50% or more.)

## Chapter 4 Existing Mechanism of Secondary School Places Allocation

### Underpinning Principles and Objectives

4.1 Student learning is affected by factors such as aptitude, self-concept, learning attitude, life experiences and socio-economic background. There are certain advantages in grouping students of similar backgrounds and abilities together. However, in the knowledge-based society of today, a diversified and wide exposure is also very important. With proper guidance, students with different strengths and aptitudes (e.g. different linguistic, interpersonal, thinking and leadership skills as well as creativity) may benefit from cooperative and collaborative learning. Through mutual stimuli, they can complement and enhance each other's overall development through broadening one another's knowledge base and horizon. The EC therefore shares the view practised in other developed countries that, insofar as the stage of basic education is concerned, we should not rely too heavily on academic results to assess students' ability, or to select students. Instead, schools should be encouraged to adopt an open attitude with regard to admitting students of different abilities and backgrounds.

4.2 Based on the rationale just described, the EC proposed in its *Reform Proposals* the following long-term goals in reforming the SSPA mechanism:

- (a) The nine-year basic education will become a coherent stage (a through road) during which pupils will no longer be required to take any high-stake public examination; and
- (b) The allocation bands will be eliminated gradually to remove the labelling effect on schools and pupils.

The EC then did not favour immediate implementation of these long-term goals. Instead, it recommended a transitional phase during which the short-term SSPA mechanism should be put in place. Whether and when to implement the "post-transition" plan (see Chapter 5) in pursuit of the long-term goals would be subject to a review to be conducted in the 2003/04 school year.

### Short-term SSPA Mechanism

4.3 In order to alleviate the examination pressure on students, to create more room for teaching and learning, to provide parents with more school choices and to encourage the all-round development of students, the Government started to implement the short-term SSPA mechanism as from the 2000/01 school year in accordance with the blueprint recommended by the EC. The key features of the short-term SSPA mechanism are the

abolition of the AAT, the increase of the DP quota and the reduction in the number of allocation bands. Details are as follows:

- (a) DP<sup>20</sup> – Starting from 2001, the percentage of DP places for secondary schools has increased from 10% to 20%. Secondary schools can, according to their own education philosophy and characteristics, decide on the admission criteria which have to be made public beforehand. They may arrange selection interviews but no written test is allowed.
- (b) Central Allocation (CA)<sup>21</sup> – Upon the abolition of the AAT in 2000, students entering secondary schools will have their school IA results (i.e. the second term of P5 and the first and second terms of P6) scaled by the average of their primary schools' AAT results in the 1997/98, 1998/99 and 1999/2000 school years. The scaled scores of all the students in the same school net will be ranked and students will then be equally divided into three allocation bands. Band One students will be allocated a place first, followed by Band Two and then Band Three students. For students of the same band, the order in which parents' choices of schools would be processed would depend on their own computer-generated random numbers.

### **Implementation of the Short-term SSPA Mechanism**

4.4 The short-term SSPA mechanism has been an issue of public concern. The EMB has been closely monitoring its implementation. Details are summarized as follows:

- (a) DP

With the increase in DP quota, parents have greater school choices while schools can decide on their own admission criteria according to their education philosophy and school characteristics. This arrangement allows both parents and schools to focus more on developing the multiple abilities of the students. Data of the past three years indicate that the DP admission has operated smoothly. Both parents and schools have made good use of the increased DP quota to increase students' chance of getting admission to their

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<sup>20</sup> The DP stage takes place before the CA stage. At the DP stage, parents may apply to any one secondary school. If a student has secured a school place at the DP stage, he/she will be automatically allocated that place.

<sup>21</sup> The CA operates on the basis of school nets. Within the same net, S1 places are allocated by allocation band, parental choice and random number. Currently, there are 18 school nets. Students participating in the SSPA belong to the net in which their primary school is situated.

preferred secondary schools<sup>22</sup>.

(b) The Banding System

- (i) Following the reduction in the number of allocation bands from five to three, the EMB has compared the SSPA results in 2001 and 2002 with those in 2000 (i.e. before the implementation of the short-term mechanism). The analyses indicate that the diversity in the ability of the S1 intake in about 40% of the secondary schools has remained the same or even reduced by a slight extent. Around half of the remaining 60% have admitted S1 students with greater diversity in ability.
- (ii) On addressing the problem of student diversity, many secondary schools have actively made use of the resources<sup>23</sup> provided by the Government to adjust the teaching strategies and to provide additional support. Some have achieved the desired result while others are still at the adaptation or exploratory stage and will need more time and room for grappling with the problem and consolidating experiences. Quite a number of schools are worried that the further widening of the within-school diversity in student ability would aggravate the situation and hence adversely affect teaching and learning effectiveness.
- (iii) Some people consider the increased randomization in school places allocation being unfair to students. Since a natural corollary of the reduction of allocation bands from five to three is the increased number of students within the same band, depending on their random number, top students' school choices may not be handled first.

(c) Scaling Mechanism

- (i) Primary schools generally welcome the abolition of the AAT which has created more room for schools to organize different learning activities

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<sup>22</sup> In 2001, the number of students securing a place at the DP stage accounted for 13.9% of the total number of students participating in the allocation. The percentage rose to 15.2% in 2002 and 15.9% in 2003. It further went up to 16.8% in 2004.

<sup>23</sup> The resources include: providing additional teachers and recurrent grants to schools with greater intake of academically low achievers for strengthening remedial teaching, introducing the School-based Curriculum Development Scheme, providing the Capacity Enhancement Grant to allow teachers to concentrate more on the diverse needs of students, etc. At the initial stage of implementing the reduction of allocation bands, the EMB arranged a number of seminars and workshops and visited schools with greater intake of low achievers to brief them on the related support measures. Additional support measures have also been introduced in cooperation with other departments (such as the Social Welfare Department and the Hong Kong Police Force).

such as project learning as well as extra-curricular and life-wide learning activities so as to widen and diversify the learning experience of their students.

- (ii) Some primary schools consider the existing scaling mechanism (*viz.* allocation bands being determined by a school's IA results scaled by the AATs of many years ago) as unfair. Progressing and newly established schools feel that their efforts to improve performance have not been duly recognized.
- (iii) Many secondary schools also express a concern that teachers are struggling hard to cope with the problem of student diversity. They urge the retention of some form of scaling so as to contain student diversity to a manageable level. This would help reduce the work pressure of teachers and ensure effectiveness in teaching and learning.

4.5 Having regard to the above concerns and stakeholders' opinions, the Working Group considers it necessary to carefully examine the presence or otherwise of the pre-conditions for the implementation of the long-term goals proposed in the *Reform Proposals* (see paragraph 4.2). The Working Group is particularly concerned about the following issues:

- (a) Student diversity – As stated in paragraph 4.4(b) above, secondary schools are still developing their professional capacity for handling student diversity. The next few years should therefore be a consolidation period during which schools and teachers may reflect on their experiences and then make improvement.
- (b) Scaling mechanism – A widely held view is that primary schools differ greatly in standards. As said in paragraph 4.4(c) above, some primary and secondary schools and parents are concerned about using the outdated AAT results as the scaling tool. Doing away with scaling will however create more problems: primary schools and parents will find the banding system unfair and unacceptable; secondary schools are worried about widening student diversity beyond a manageable level. Unless secondary schools have adequate support measures to handle diversity, the overall teaching effectiveness will be affected. In fact, some schools and parents consider meaningless drilling as the major drawback of the AAT. They find a curriculum-based scaling mechanism more acceptable.
- (c) Parental choice – The *Reform Proposals* recommends that in the post-transition period, each student could apply to two secondary schools at

the DP stage so as to allow for more parental/student choices. To implement this, we need to work out the operational details such as the DP quota and how parents should indicate their two choices.

In conclusion, the Working Group is guided by the rationale of the Education Reform and the EC's long-term goals in reforming SSPA mechanism in its review of the existing SSPA mechanism.

## Chapter 5 The Post-transition Secondary School Places Allocation Mechanism

### Guiding Principles

5.1 The Working Group re-affirms the rationale put forward by the EC in its *Reform Proposals*. On this basis, the Working Group has laid down the following guiding principles in reviewing the SSPA mechanism:

- (a) Students should be provided with a coherent, comprehensive and balanced learning experience at the basic education stage. **Therefore, we should as far as possible avoid using any assessment tool that is directly linked to students' school places allocation results and that hampers the learning of basic subjects.**
- (b) Students have multiple intelligence and abilities for continuous improvement. At the time of admission to secondary schools, their intellectual abilities are still developing. **Premature and precise labelling of students according to their abilities not only goes against the worldwide trend of education but also affects students' self-image and stifles development of their potentials.**
- (c) Students' abilities are domain-specific. **“Appropriate” mixed ability teaching enables students to complement and learn from each other, thus benefiting from a more diversified development. This can help foster their self-confidence, tolerance and ability to work in groups. By “appropriate”, we mean diversity in student ability at a level manageable by schools and teachers under the present circumstances and conditions, so that both the high and low achievers are adequately taken care of and that they can self-actualize.**
- (d) The SSPA mechanism should, as far as possible, **respect parents' and students' school choices** by providing them with more opportunities to select their preferred schools directly.

5.2 **The Working Group agrees to the EC's proposal of “no banding and no scaling” as the long-term goal for reforming the SSPA mechanism. However, the Working Group considers that the following pre-conditions must be in place before this long-term goal can be realized:**

### Primary Schools

- (a) **The majority of students meet the basic competency in Chinese, English and Mathematics when they complete their primary education.**

### Secondary Schools

- (b) **The majority of secondary school teachers possess sufficient professional knowledge and skills, as well as the space to develop school-based curriculum and effective teaching pedagogies to cater for widened student diversity and ensure that most of their students meet the basic competency in Chinese, English and Mathematics when they complete junior secondary education.**

5.3 **After examining the between-school diversity in student abilities and present circumstances of school education in Hong Kong, the Working Group concludes that the above pre-conditions have yet to be met at the present stage.** The Working Group therefore adopts an open and pragmatic approach by taking the “post-transition SSPA mechanism”<sup>24</sup> proposed in the *Reform Proposals* as the starting point of the review.

### **Areas of Concern**

5.4 Working on the interaction between the DP and CA stages of the SSPA mechanism to strike a balance between various concerns is the key to addressing the issues of student diversity, randomization in the allocation of school places, mixed ability learning and parental choices. Specifically, the points on which the Working Group focuses include:

- (a) At the DP stage, whether it is possible to **respect the choices of students and parents while** allowing schools to admit students according to their own education philosophy and characteristics as well as seeking to **promote the diversified development of both students and schools;** and

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<sup>24</sup> The major elements of the “post-transition SSPA mechanism” include:

#### DP

- The percentage of DP will increase from 20% to 30%.
- Each student may apply to two secondary schools.
- Other features will be the same as those of the short-term SSPA mechanism.

#### CA

- There will be no scaling mechanism. Students in each primary school who have not secured an S1 place during the DP stage will be divided into three equal allocation bands according to their school IA results (i.e. the second term of P5 and the first and second terms of P6).
- Other features of the short-term SSPA mechanism will be retained, i.e. school places will be allocated by school net, allocation band, parental choice and random number.

- (b) At the CA stage, whether the banding system helps **contain the range of within-school student diversity**, and whether randomization within an allocation band helps facilitate mixed ability learning and reduce the labelling effect on students.

## **Proposed Options**

### DP Stage

#### *Increase of DP Quota*

5.5 The EC's *Reform Proposals* recommends increasing the DP quota of the post-transition SSPA mechanism from 20% to 30%. The Working Group agrees that increasing the DP quota can give parents and students more school choices and provide schools with a greater scope to select students according to their education philosophy and characteristics. This can help encourage secondary schools to take into account both the academic and non-academic performance of students in student admission, promote diversity in secondary education and induce primary schools to improve the provision of balanced education.

5.6 From views collected so far, the Working Group notes that the school sector and parents generally welcome the increase of DP percentage to 30%, while a minority of secondary schools wish to see a further increase of the percentage. At present, the utilization rate of the DP quota varies among schools, with some receiving applications far exceeding the quota and some being unable to fully utilize the quota. Substantially increasing the percentage would aggravate the difference in utilization rate among schools, which may in turn create a labelling effect on schools. **The Working Group therefore considers increasing the DP percentage to 30% appropriate.**

#### *Cease Providing the "Rank Order List"*

5.7 Under the current arrangement, the EMB provides individual secondary schools with a "rank order list" of their DP applicants for reference purpose. The list ranks a school's applicant-students according to their respective scaled IA results. **To encourage secondary schools to adopt diversified admission criteria and take into account the overall performance of students, the Working Group favours ceasing the provision of the "rank order list" to secondary schools. This arrangement will also encourage primary schools and parents to focus more on the all-round development of students.**

#### *Allowing Students to Apply to Two Secondary Schools During the DP Stage*

5.8 To enhance parental choice and to encourage utilization of the increased DP quota,

**the Working Group supports the recommendation in the *Reform Proposals* that each student be allowed to apply to two secondary schools during the DP stage.** However, some schools have expressed concern about the increase in administrative work and teachers' workload arising from the need to process a large number of applications. They thus enquire if schools should be informed of the order of preference of an applicant's school choices. In this connection, the Working Group puts forth the following three options<sup>25</sup>:

*Option (1): Parents must indicate their order of preference to schools*

5.9 As far as parents and schools are concerned, this option enhances the transparency of the application process. Schools not preparing to consider second-choice applications may declare in advance their position so that parents can choose other schools. With such transparency, parents will be unlikely to confine their choices to only a few popular schools. This will help boost the overall quota utilization rate and thus optimize the DP arrangement.

5.10 Besides, some schools may take the order of parental choice as one of the criteria for selecting applicants during the first round of interviews. This would simplify processing, avoid unnecessary increase in assessment and interview work, facilitate a more accurate projection of their DP utilization rate, obviate the need for a long waiting list and avoid wasting a DP place when a successful applicant opts for another school.

5.11 Nevertheless, some fear that such a highly transparent arrangement may induce schools to over-emphasize the order of preference in school choices, at the expense of the ability and aptitude of students. Some parents are also concerned that schools may not favour applicants who regard the schools as a second choice. In other words, the so-called "second choice" is not a genuine choice.

*Option (2): Parents indicate their order of preference to the EMB only*

5.12 Under this option, the EMB will, upon schools' completion of the selection procedures, prepare a list of students admitted at the DP stage by matching schools' selection results with parental school preference. By ensuring that their second choice will also be a genuine choice, this arrangement will dispel the anxiety of parents and students. In addition, since schools cannot take parental school preference as one of the selection criteria for interview or admission, the applicant-students can compete on the basis of ability, aptitude and interview performance.

5.13 However, schools may have to process all the applications and prepare a lengthy

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<sup>25</sup> The Working Group has considered other options such as processing DP applications in two phases, or waiving the requirement for prior indication of order of preference, etc. However, since these arrangements may be burdensome on schools and parents and would complicate and lengthen the screening procedures excessively, the Working Group does not consider them feasible and hence has excluded them from the options for public consideration.

waiting list since some students may forgo the places offered by schools of their second choice in favour of offers by their first-choice schools. As such, schools' administrative, interview- and selection-related work will inevitably increase. Realistically, with the exceptions of a few very popular schools, it is almost impossible for schools to ascertain accurately the number of applicants who would make them as the first choice and as a result, the appropriate length of the waiting list. This will result in under-utilization of the DP quota.

Option (3): Parents indicate their order of preference to the EMB only, and schools may declare in advance that second-choice applications would not be considered

5.14 This option has the advantage of reducing the workload of some popular schools and, at the same time, safeguarding genuine choice for parents and students. If parents still submit second-choice applications to schools which have declared that they would consider first-choice applications only, the EMB will advise the schools not to process such applications. However, the Working Group anticipates that, apart from a small number of very popular schools, most schools will be unlikely to limit their selection to applicants who opt for them as first choices. In effect, most schools still need to process a large volume of applications. Therefore, in terms of the administrative burden on schools, the implications of this option are similar to those described in paragraph 5.13.

## CA Stage

### *Unrestricted CA Places*

5.15 Choices of schools under the present CA mechanism are restricted on a school-net basis, yet the number and types of schools in different school nets vary. **To increase the choice of parents and students, the Working Group proposes more flexibility by allowing parents to choose schools outside their school nets, i.e. by introducing “unrestricted” CA choices.**

5.16 Since the school netting arrangement takes into account parental choices and the principle of vicinity, the Working Group considers it inappropriate to set aside too high a percentage of CA places for “unrestricted” choices. After drawing reference from the Primary One Admission (POA) System, the Working Group **proposes that 10% of the CA places in each secondary school should be set aside as “unrestricted places”.** Parents can select a designated number of secondary schools (say, not more than three) from any school nets<sup>26</sup>. The remaining 90 % of the CA places will continue to be allocated on the basis of school nets. The computerized allocation mechanism will process the school

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<sup>26</sup> This proposal is similar to the existing CA mechanism for POA. Under the POA system, 10% of the CA places are unrestricted by school nets; parents can choose no more than three schools from any school nets (including the one to which the applicant belongs as determined by his/her residential address).

choices for “unrestricted places” first, to be followed by the choices that are subject to net restriction.

### *Scaling Mechanism*

5.17 As stated in paragraphs 4.4(c) and 4.5(b), the Working Group shares schools’ and parents’ concern that **there is still a need to retain some form of mechanism for scaling** schools’ IA results. However, the scaling mechanism must be premised on the principles set out in paragraph 5.1. **If the community supports the need for scaling, the Working Group wishes to put forth two options** for consideration:

#### *Option (1): Maintaining the current scaling mechanism*

5.18 Under this option, the past AAT results will continue to be used to scale the school IA results for banding purpose. The purpose is to allow secondary schools more time and a stable environment to consolidate their experience in handling student diversity, thus enhancing the requisite professional skills and achieving the objective of effective mixed ability teaching. This option will eventually lead to the long-term goal of “no banding and no scaling”.

5.19 However, as stated in paragraph 4.4(c) above, some people question the validity of using outdated AAT results to scale schools’ IA results for determining students’ allocation bands. Progressing or newly established primary schools and their parents/students feel especially aggrieved by such a practice as their performance is not duly recognized. Besides, secondary schools are also concerned that with the passage of time, the problem of within-school student diversity will worsen to an unmanageable extent, thus ultimately undermining teaching effectiveness.

#### *Option (2): Using the pre-S1 HKAT for scaling purpose*

5.20 If another scaling instrument is to replace the AAT, it should be:

- (a) valid, reliable and fair;
- (b) easily understood and administered;
- (c) preferably curriculum-based and relevant to the teaching and learning in primary schools; and
- (d) neutral in terms of the impact on the allocation results of the students taking the assessment so as to reduce the incentive for drilling.

5.21 The Working Group has considered several possible options of a scaling

mechanism, including the Basic Competency Assessment, a redesigned AAT and a school profile. The Working Group **concludes that the existing pre-S1 HKAT best meets the requirements of (a) to (d) above.** Chapter 3 of this document has already proposed the adoption of the pre-S1 HKAT results to scale students' IA results for ascertaining EMI-capable students. If that proposal is accepted (i.e. to collect samples of the pre-S1 HKAT results biennially and use the average of the results of the two most recently sampled pre-S1 HKATs to scale the IA results of the coming cohort of P6 students proceeding to S1, see paragraph 3.9), the pre-S1 HKAT can be used as the scaling tool for SSPA as well, hence obviating an "extra" assessment for students.

5.22 The Working Group accepts that, irrespective of the attempts to lower the stake of the pre-S1 HKAT, its adoption as a scaling tool may induce primary schools to drill students. Besides, as the pre-S1 HKAT only assesses students' performance in Chinese, English and Mathematics, schools and parents may focus their attention on these three subjects to the detriment of students' all-round development. Nevertheless, the Working Group considers that, although the pre-S1 HKAT does not assess other learning areas, performance in Chinese, English and Mathematics should be reflective of a student's overall learning aptitude. In respect of performance in the non-academic domain, the Working Group considers that the DP mechanism would play a balancing role. By proposing to increase the DP quota to 30%, to allow students to apply for two schools and to cease providing the "rank order list" to secondary schools, the Working Group intends to encourage schools to consider the overall performance of the applicant-students.

#### *Number of Allocation Bands*

5.23 The finer the system of allocation banding is, the greater will be the labelling effect and adverse impact on students' self-confidence. This was the consideration behind the EC proposal in 2000 to progressively reduce the allocation bands and as an initial step, to reduce the number of bands from five to three. This has inevitably widened within-school diversity in student ability. Despite the support provided by the EMB, some consider that schools and teachers still feel overwhelmed by the problem of student diversity.

5.24 The EMB notes from school inspections that whether a school can cope with student diversity hinges mainly on whether the school can effectively enhance students' motivation and interest in learning, and help them learn how to learn. In addition, equally crucial are the vision and leadership of the principal, the shared mission and morale of the staff, the flexibility and attitude of the school in resource deployment as well as parental support, which are also the very factors that help make a school a highly effective learning community. A study conducted by The Chinese University of Hong Kong in 2003 indicates that secondary schools that pay greater attention to the problem of student diversity are more likely to be able to address it.

5.25 The Working Group agrees that, under the education philosophy of mixed ability learning, schools and teachers would need to differentiate the provision of support and enrichment measures on the basis of students' needs. At the risk of stating the obvious, experience in handling student diversity needs accumulation and consolidation to provide the basis for expertise development. As many reform initiatives are still underway, the Working Group finds it inappropriate to further reduce the number of allocation bands at this stage, in order to avoid increasing the burden of secondary schools in handling student diversity. The Working Group **proposes to maintain the status quo, i.e. to retain the three-band system.**

## **Chapter 6 Medium of Instruction and Secondary School Places Allocation – The Long-term Vision**

6.1 The Working Group shares the long-term vision of “no banding and no scaling” for the SSPA mechanism as set out in the *Reform Proposals*. As for the MOI arrangement, the Working Group supports mother-tongue teaching. An ideal scenario would be the concurrent existence of the following: wide community acknowledgement of the merits of mother-tongue teaching; schools’ readiness to determine their MOI professionally in the light of their own characteristics, education philosophy and students’ ability; an assurance of students’ English proficiency; and parental acceptance of mother-tongue teaching. Having examined carefully the present circumstances, the Working Group considers that there is still a long way to go to reach such a scenario.

6.2 Regarding the long-term vision for the SSPA mechanism, the Working Group is of the view that the pre-conditions set out in paragraph 5.2 above have yet to be met. Great divergence in standards still exists between primary schools and many secondary school teachers are still grappling with the problem of within-school diversity in student ability. At this stage, a more pragmatic approach to achieving the long-term goals of the *Reform Proposals* is deemed more viable. This would imply allowing schools and teachers to consolidate their experience in handling student diversity and focusing on enhancing the overall quality of school education. This transitional stage would help ensure effectiveness in teaching and learning and reduce diversity in standards between primary schools.

6.3 As regards the MOI arrangement in secondary schools, the Working Group considers that fundamental changes to the public perception of EMI teaching would not be likely in the short to medium run. If the within-school approach to MOI determination is adopted at this stage, it would not only restrict the scope for school development but also undermine mother-tongue teaching. Notwithstanding the controversies and limitations of the existing between-school bifurcation approach, the Working Group recognizes its greater merits. Therefore, to facilitate the sustained development of mother-tongue teaching whose efficacy is evident, the Working Group recommends the continuation of the bifurcation approach, but with improvements made to the present arrangement.

## **Chapter 7 Major Recommendations and Key Points for Consultation**

7.1 Based on the findings of various studies, data analyses, school visits, classroom observations, interviews with stakeholders and deliberation over the past year or so, the Working Group now sets out the recommendations on the long-term arrangements for MOI for secondary schools and SSPA mechanism, which are summarized below. Views from the public are invited.

### **The MOI Policy for Secondary Schools**

#### Junior Secondary Levels

7.2 In principle, all secondary schools should continue to adopt mother-tongue teaching at the junior secondary levels. There is no objection to individual schools using English as the MOI if they fully meet the prescribed criteria of student ability, teacher capability and support measures. However, we encourage these schools to adopt mother-tongue teaching. Specific details on determining the three prescribed criteria are set out as follows:

#### *Student Ability*

7.3 The existing pre-S1 HKAT will be used as a scaling tool. Samples of the test results will be collected biennially. The average of the results of the two most recently sampled pre-S1 HKATs will be taken to derive the scale for application to primary schools' IA results of the coming cohort of P6 students proceeding to S1. The scaled IA scores of all P6 students will be put into a pecking order. Based on the findings of the Angoff study, the top 40% of students will be taken as having the ability to learn through English (see paragraph 3.9). The percentage of these students admitted to individual secondary schools will be known upon the release of the SSPA results each year.

7.4 At the school level, should EMI teaching by class be adopted, each EMI class must have at least 85% of students capable of EMI learning. Should the bifurcation between EMI and CMI schools be continued, an EMI school must have at least 85% of all its S1 intake in the school being capable to learn through English (see paragraph 3.11).

#### *Teacher Capability*

7.5 In principle, teachers teaching through English must be able to communicate their subject content to students intelligibly and that their use of English should have no adverse impact on students' acquisition of the English language. Specifically, the basic language proficiency requirement for new EMI teachers is as follows (see paragraphs 3.14 to 3.16):

- (a) a Grade C or above in English Language (Syllabus B) of the HKCEE or equivalent (including band 6 or above in the IELTS; a pass or above in English in the GCE O-Level (Overseas) Examination);
- (b) a Grade D or above in Use of English of the HKALE;
- (c) having met the Language Proficiency Requirements (English); or
- (d) a Grade C or above in English Language in the defunct HKHLE.

7.6 As for serving EMI teachers who have not attained any of the above qualifications, they may have their capability certified in one of the following ways (see paragraph 3.17):

- (a) to obtain one of the qualifications listed in paragraph 7.5(a) to (c) within two years from the 2005/06 school year; or
- (b) to opt for classroom observation by both subject and language experts appointed by the EMB to assess their overall capability to teach through English, *viz.* “to communicate the subject content intelligibly and their use of English should have no adverse impact on students’ acquisition of the English language”.

7.7 For every three years, EMI teachers should complete at least 15 hours of EMI-related continuous professional development activities (see paragraph 3.18).

### *Support Measures*

7.8 Schools are required to set out school-based support strategies and measures for EMI teaching in their school development plans and annual school reports. Based on the results of quality assurance inspections and schools’ self-evaluation, the EMB could then assess whether adequate support measures are in place (see paragraphs 3.20 to 3.22).

### *MOI Arrangement at School Level*

7.9 There are two approaches to the MOI arrangement at junior secondary levels, namely the within-school approach (schools can practise both EMI and CMI teaching) and the bifurcation approach (maintaining the current distinction between EMI and CMI schools). The Working Group puts forth both approaches for public consultation. Nevertheless, for the reasons of enhancing learning effectiveness and whole-person development of students, the Working Group recommends the continuation of the bifurcation approach (see paragraphs 3.26 to 3.34).

7.10 The Working Group also proposes to introduce a six-year review cycle for

assessing EMI schools if they still fulfill the three prescribed criteria and to allow aspiring and “EMI-qualified” CMI schools to apply to adopt EMI (see paragraphs 3.35 to 3.38).

### Senior Secondary Levels

7.11 Schools using Chinese as the MOI at junior secondary levels may switch to EMI teaching at senior secondary levels for certain subjects in some classes. Such a switch must take into account students’ ability for EMI learning and be conditioned upon the fulfillment of the criteria for teacher capability and support measures (see paragraphs 3.39 to 3.43).

### DSS Schools

7.12 Having considered the broad direction of mother-tongue teaching, the Working Group is of the view that DSS schools have to meet the prescribed criteria of student ability, teacher capability and support measures if they are to adopt English as the MOI. In operationalizing this principle, having regard to the DSS concept, the Working Group recommends that the current flexibility be maintained. However, since an immersion mode is more effective in overcoming the barriers of using a second language to learn, the Working Group does not recommend that DSS schools adopt different MOI for different subjects at junior secondary levels (see paragraphs 3.44 to 3.46).

### Capitalizing on Mother-tongue Teaching while Enhancing English Proficiency

7.13 Schools which adopt mother-tongue teaching at junior secondary levels may choose to allocate, on top of English Language lessons, no more than 15% of total lesson time for extended learning activities conducted in English, in order to increase students’ exposure to and use of English for learning. Teachers who conduct such extended learning activities in English should also meet the EMI teacher capability requirement (see paragraphs 3.51 to 3.54).

7.14 Additional resources currently provided for CMI schools should continue. To allow for more flexibility in resource deployment, the Government should consider allowing CMI schools to opt for replacing part or all of the additional teaching posts with a cash grant (see paragraph 3.55).

7.15 The Working Group also proposes that the SCOLAR should further explore ways to create a favourable social environment for English learning, taking into account the latest development of the MOI arrangement in secondary schools (see paragraph 3.56).

### **The SSPA Mechanism**

7.16 DP – To increase parents’ choice and enhance the diversified development of

schools and students through –

- (a) increasing the DP quota from the existing 20% to 30% (see paragraphs 5.5 to 5.6);
- (b) ceasing the provision of the “rank order list” to secondary schools (see paragraph 5.7);
- (c) allowing parents/students to apply to two secondary schools at the DP stage. As regards the order of preference, the following three options may be considered (see paragraphs 5.8 to 5.14):
  - (i) Parents indicate their order of preference to the schools;
  - (ii) Parents indicate their order of preference to the EMB only; or
  - (iii) Parents indicate their order of preference to the EMB only, and schools may declare in advance that second-choice applications will not be considered.

7.17 CA – To encourage appropriate mixed ability teaching and alleviate labelling effects through –

- (a) assigning 10% of the CA places of every secondary school for allocation “unrestricted” by school nets so as to provide parents with more choices (see paragraphs 5.15 to 5.16);
- (b) retaining a scaling mechanism to contain student diversity of secondary schools within a manageable level. The Working Group proposes for public consultation the following two options for scaling the IA results of primary schools (see paragraphs 5.17 to 5.22):
  - (i) to continue with the current scaling mechanism (i.e. to adopt the past AAT results); or
  - (ii) to use the existing pre-S1 HKAT as a scaling tool (i.e. using the same tool proposed for ascertaining EMI-capable students). Samples of the pre-S1 HKAT results will be collected biennially. The average of the results of the two most recently sampled pre-S1 HKATs will be used to scale the school IA results of the coming cohort of P6 students proceeding to S1. The students will then be divided into allocation bands within each school net according to the scaled results.

- (c) maintaining the existing three-band arrangement (see paragraphs 5.23 to 5.25).

### **Implementation Timetable**

7.18 If the proposals in this document are accepted, **the soonest the revised SSPA mechanism can apply is to the cohort of students who will be admitted to S1 in September 2007. The MOI arrangement can be effected in September 2008 at the earliest** and secondary schools which will have to change their MOI status will be notified by the end of 2007.

7.19 The Working Group welcomes your valuable views on the above recommendations on the MOI arrangement for secondary schools and the SSPA mechanism. Comments should be sent to the Secretariat of the Working Group by post, fax or e-mail **on or before 2 May 2005**:

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7.20 We shall arrange seminars to discuss the above recommendations with the community and we look forward to your active participation.

**Working Group on Review of Secondary School Places Allocation  
and Medium of Instruction for Secondary Schools -**

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## **MOI-Related Research Studies**

### **(I) Studies Conducted Prior to the Implementation of the *Guidance***

#### **1. The Effects of the Medium of Instruction on Student Cognitive Development and Academic Achievement (1979) (The Chinese University of Hong Kong)**

##### **Content of Study**

- To investigate through tests, questionnaires and classroom observations the effect of MOI on the cognitive development and the linguistic competency (Chinese and English) of students when studying World History, Mathematics and Science subjects under different MOI environments.

##### **Findings**

- For students with moderate and weaker academic performance, teaching through English dampened their cognitive and linguistic (Chinese and English) development.
- For high performers, although EMI teaching did affect their cognitive development, their competency in English and Chinese remained at a high level.
- There was less student participation in EMI teaching classroom. Teachers were also inclined to adopt unidirectional teaching with fewer analytical questions raised.

#### **2. An Investigation of the Effectiveness of Various Language Modes of Presentation, Spoken and Written, in S3 in Hong Kong Anglo-Chinese Secondary Schools (1985) (Former Education Department and The University of Hong Kong)**

##### **Content of Study**

- Over 1 200 S3 students from ten secondary schools participated in this study. Lesson materials were given in the form of Chinese or English videotapes or printed texts, and tests were given after the lessons.

##### **Findings**

- About 30% of the students who attempted the test in English had good performance. Another 30% of the students encountered severe difficulty. The remainders were somewhat in between.
- The majority of the students who had encountered severe difficulty preferred to learn in the mother tongue.

**3. The Effects of the Medium of Instruction on the Achievement of S2 Students in Hong Kong Secondary Schools (1985)** (Former Education Department and The University of Hong Kong)

**Content of Study**

- 29 schools experimented using Chinese or English as the MOI in History and Science in S2 classes.

**Findings**

- English proficiency was the main determinant of whether a student had the ability to learn through English.
- There was a high correlation between students' proficiency in English and Chinese, i.e. students with high proficiency in English were normally also highly proficient in Chinese and vice versa.
- 30% of students with the highest proficiency in English could learn through English effectively.
- Notwithstanding additional explanation in Chinese, EMI teaching still posed an obstacle to learning for the rest of the students (about 70%).

**4. Studies on the Modes of Language of Instruction at Junior Secondary Levels in Anglo-Chinese Secondary Schools (1985)** (Former Education Department)

**Content of Study**

- A two-year study was conducted in S1 to S3 classes of 15 Anglo-Chinese secondary schools. During the study period, students' proficiency in Chinese and English as well as performance in Mathematics, Science and History was assessed regularly through Chinese, English and bilingual test papers. Teacher and student questionnaire surveys were also conducted.

**Findings**

- There was greater use of mother-tongue teaching than before. The subjects involved, in descending order of the frequency of the use of the mother tongue, were Mathematics, Science and History.
- Students with a lower English standard indicated that they understood less than half of the lesson conducted in English.
- If the English standard of the students was divided into 14 levels (level 1 being the highest), then full EMI teaching to students at or below level 5 (i.e. levels 5 to 14)

was rare. The study also indicated that only 10%, 21% and 28% of the students in S1, S2 and S3 respectively were at level 4 or above.

**5. A Comparison of Academic Performance of Junior Secondary Students in Anglo-Chinese and Chinese Middle Schools (1985)** (Former Education Department)

**Content of Study**

- A comparison was made between S1 - S3 students in Anglo-Chinese secondary schools and their peers in Chinese Middle schools in their performance in Chinese Language, English Language, Mathematics, Science and History.

**Findings**

- The students in Anglo-Chinese secondary schools performed better in English Language while the students in Chinese Middle schools performed better in Chinese Language and History.
- As to the performance in Mathematics and Science, the difference between the two groups of students was not significant, though students of Chinese Middle schools performed slightly better.

**6. A Study on the Relation between Initial Language Proficiency at Secondary 1 Level and Subsequent HKCEE Performance for MOI Grouping (1992)** (Former Education Department)

**Content of Study**

- A correlation analysis was conducted between the performance of a cohort of S5 students in the 1990 HKCEE and their P6 IA results in English Language and Chinese Language as scaled by the AAT under SSPA in 1985.

**Findings**

- There was a high correlation between the SSPA scaled score in Chinese Language and English Language and performance in the HKCEE.
- For students who obtained 14 points or above in the HKCEE and who were studying in Anglo-Chinese schools that used English as the sole MOI, their abilities in English and Chinese were mostly above the 60<sup>th</sup> percentile.
- Students taught solely through one language (either English or the mother tongue) performed better in the HKCEE than those taught through a mixed code of English and Chinese.

**7. A Comparison of Pupils' HKCEE Results between Schools Using Chinese as MOI in All Subjects and Schools Using Chinese/English as the MOI by Subject (1994)**  
(Former Education Department)

**Content of Study**

- To examine the difference in the 1993 HKCEE results between these two groups of schools.

**Findings**

- For students of comparable abilities, the overall average performance of students from schools using Chinese as the MOI in all subjects was higher than those from schools using Chinese or English as the MOI in different subjects. Such observation was especially apparent in Chinese Language, English Language (Syllabus B) and language-loaded subjects such as Geography, History and Economics.
- There was no significant difference in the performance in science subjects between these two groups of students.

**8. Research on Change of MOI in Secondary Schools (1994)** (Former Education Department)

**Content of Study**

- The experimental group comprised 11 Anglo-Chinese schools with over 50% of the subjects switched to mother-tongue teaching. The control group was another 11 schools. An index of levels 1-5 was used to represent the language environment in schools (level 1 for a school language environment being mainly English, levels 2-4 representing varying degrees of English environment in descending order, with level 5 being mainly Chinese).

**Findings**

- Students in a relatively predominant English environment performed better in English Language while students in a relatively predominant Chinese environment performed better in Chinese Language, Science, History and Geography.
- More frequent use of mother-tongue teaching was conducive to inducing students' learning motivation and adoption of higher-level cognitive strategy of learning.
- Schools were advised to adopt a single MOI.

**9. Educational and Social Determinants of Language Education Policy (1995) (The Chinese University of Hong Kong)**

**Content of Study**

- Students were examined to see whether they had the basic level of language proficiency for bilingual learning.

**Findings**

- If obtaining 14 points or above in the HKCEE was used as the criterion, the following groups of students could benefit from bilingual learning: (a) those with a high standard in both Chinese and English; (b) those with a high standard in Chinese and a moderate standard in English; and (c) those with a high standard in English and a moderate standard in Chinese.
- If having five or more subjects passed in HKCEE was used as the criterion, apart from the above three groups, students with a moderate standard in both Chinese and English could also benefit from bilingual learning.

**10. Evaluation Study on the Implementation of MOI Grouping in Secondary Schools: 1994/95-1996/97 school years (1998) (Former Education Department)**

**Content of Study**

- Performance under different modes of teaching medium (English, Chinese and varying degrees of mixed mode in English and Chinese) of S1 entrants of 56 schools were tracked over three years.
- Assessments on Chinese Language, English Language, Mathematics, Science, Geography and History were conducted annually.

**Findings**

- Mother-tongue teaching helped students achieve value-added performance. For students of comparable abilities, students taught in the mother tongue performed better than those learning through other modes of MOI.
- There was no evidence suggesting that EMI teaching could raise the English standard of students.
- Generally speaking, students taught in English (especially those studying in schools which ignored the former Education Department's advice on the adoption of mother-tongue teaching) had encountered some language impediments to learning, particularly in language-loaded subjects such as History.

**11. Late Immersion and Language of Instruction in Hong Kong High Schools: Achievement Growth in Language and Non-language subjects (2000)<sup>27</sup>** (Herbert W. Marsh, Hau Kit-tai and Kong Chit-kwong)

**Content of study**

- The study aims at evaluating the effects of mother-tongue teaching and EMI teaching on the effectiveness of learning by assessing the performance of more than 12 700 S1 students from 56 Chinese and Anglo-Chinese secondary schools. Assessment was based on standardized tests administered to the students in S1 to S3 and their achievement test results in P6 for placement to S1.

**Findings**

- For students of comparable abilities, performance of EMI students lagged far behind their CMI counterparts in History, Geography and Science.
- As compared to EMI students, CMI students with comparable abilities performed better in non-language subjects, while their performance in language subjects was slightly disadvantaged.
- The extent of negative effect of EMI teaching was not reduced even for students with better academic performance, but students with better English experienced less disadvantages in EMI learning.

**(II) Studies Conducted after the Implementation of the Guidance**

**12. Survey on Medium of Instruction in Schools (1999) (SCOLAR)**

**Content of Study**

- Principals, teachers, students and parents from 80 secondary schools were asked to complete questionnaires which surveyed their experiences and views regarding the *Guidance* one year after its implementation.

**Findings**

- Mother-tongue teaching had enabled more diversified modes of teaching, greater student participation and more in-depth discussion in class. It also promoted better teacher-student relationship. Such improvements were also common in CMI schools with lower student ability.
- The majority of school principals or teachers, be they from CMI schools or EMI

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<sup>27</sup> The study was conducted before the implementation of the *Guidance* and the findings were reported in 2000.

schools, believed that only a minority of students could learn effectively through English.

- Half of the parents believed that it was more important to perform better in English than in other academic subjects.
- Most teachers agreed that EMI teaching was not the only way to improve the English proficiency of students.
- Most school principals, teachers and parents agreed that the English proficiency of teachers was a pre-requisite to teaching through English.
- Most of the principals of EMI schools considered parents as the major source of obstacle in promoting mother-tongue teaching.

### **13. Questionnaire Survey on the Implementation of CMI-Teaching in Schools (2002)** (Support Centre for Teachers Using Chinese as the Medium of Instruction, Faculty of Education, The University of Hong Kong)

#### **Content of Study**

- Views were collected through questionnaire surveys and panel discussions with academics, principals and teachers.

#### **Findings**

##### Effectiveness of mother-tongue teaching at junior secondary levels

- There was improvement in students' performance in learning (including self-confidence, motivation and academic achievement, etc.).
- Teachers could deliver their lessons in a more in-depth manner, improve their teaching pedagogies and encourage more active participation of the students in lessons. To achieve higher-level learning goals, teachers looked forward to reforms in the curriculum, teaching pedagogies and assessment.

##### Implementation of MOI at senior secondary levels

- The majority of schools adopted both Chinese and English as the MOI at senior secondary levels. The mother tongue was more frequently used as the MOI in humanities subjects than in science subjects.
- Schools in general considered that the nature of the subjects, the learning ability and language proficiency of students were important factors in determining the MOI.
- However, many schools believed that a diversified MOI arrangement would cause

much difficulty to schools.

- Most of the schools and teachers hoped for policy consistency and a stable environment to enable consolidation of the benefits of mother-tongue teaching at junior secondary levels. As for support, teachers desired improvements in the quality and quantity of teaching materials as well as enhanced training for, and opportunity for sharing and collaboration among, teachers engaged in mother-tongue teaching.

#### **14. Evaluation on the Implementation of the MOI Guidance for Secondary Schools: 1999-2002 (2004) (The Chinese University of Hong Kong)**

##### **Content of Study**

- 100 secondary schools were chosen by stratified random sampling to participate in the research. They included EMI schools (25 schools) and CMI schools (which were divided into three groups of high, middle and low levels according to the academic achievement of their students, and each group consisted of 25 schools).
- To study, from the perspectives of students' background, their learning habit and learning environments (including classroom, school and socio-cultural dimensions), the effect of CMI or EMI teaching on the learning and psychosocial development of students.

##### **Findings**

###### Academic achievement

- CMI teaching was more effective than EMI teaching in enhancing student performance in science and social subjects.
- The difference in performance in science subjects could be attributed to both the language used in classroom teaching and assessment, whereas for social studies, it was mainly due to the language used in assessment.
- Compared with CMI schools, EMI schools were more capable in enhancing students' performance in English Language.
- There was no significant difference between EMI and CMI schools in student performance in Chinese Language and Mathematics.

###### Personal development

- Students in EMI schools were more confident in their proficiency in English, and they had greater interest and motivation in learning English.

- Students in EMI schools found learning through English less effective but believed that EMI teaching would bring about a better prospect. In contrast, students of CMI schools found learning through the mother tongue more effective but felt that mother-tongue teaching would be disadvantageous to their future development.

### The teaching and learning process

- Through mother-tongue teaching, teachers could more effectively explain abstract scientific concepts and complicated social issues. They could also integrate better daily life examples with conceptual exposition. Students participated actively in class. They were more ready to ask questions, express their views, give examples and engage in group discussions and class debates. Teachers of EMI schools admitted that teaching through English reduced the extent of student participation in class.
- Students found the terminology and inquiry methods in Science unfamiliar when they first encountered the subject. These constituted barriers to learning even if they learned through the mother tongue. There would be additional hindrance if students learned through English.

### **15. English Language Critical Literature Review: First and/or Second Language as a Medium of Instruction (1999) (SCOLAR)**

- Overseas experience of bilingual education had been drawn in the review of the MOI arrangement in Hong Kong. The study concluded that the following conditions were important for students to benefit from bilingual or second language education:
  - Socio-linguistic environment: the first language had an important status and was widely used.
  - Family factor: students obtained care and support from their families which provided rich resources such as books and magazines to help students in their learning.
  - School education: both language and content subject teachers had adequate proficiency in both languages, and were professionally knowledgeable in teaching pedagogy and curriculum development, so that they could help their students enhance their motivation in learning a second language, and provide more opportunities for them to use the second language.

## **Development of MOI Policy in Secondary Schools in Hong Kong**

Before the introduction of universal secondary education in Hong Kong, English was the main MOI in secondary schools. In 1978, the Government introduced nine-year compulsory education from primary to junior secondary levels. Students who previously did not have access to secondary education could receive education up to the junior secondary levels. However, since many students did not possess the necessary English proficiency to learn through English, mixed-code teaching was common in secondary schools with many of the class hours spent on translating English texts and terms into Chinese. This not only affected the progress and effectiveness of teaching but might not help enhance the Chinese and English proficiency of students. Many students thus lost their interest and confidence in learning. Those who could barely manage were inclined to learn through rote memorization.

2. In 1982, an International Visiting Panel, after reviewing the education system in Hong Kong, pointed out in its report *A Perspective on Education in Hong Kong* that the measures concerning the use of English as the MOI “do not confront the basic issue of whether it is possible to use a second language successfully as the vehicle for providing universal (compulsory) education”. The Panel suggested imposing “Cantonese as the medium of instruction in Form 1-3” so that students could use the “language of the heart” to complete the nine years of basic education.

3. The EC recommended in its *Report No. 1* in 1984 that Chinese should be extensively used as the MOI in secondary schools. The Report also suggested that the Government should provide additional support to secondary schools using Chinese as the MOI for strengthening the teaching of English as a subject, so as to avoid a decline in students’ English standard due to reduced exposure to English. This policy direction was re-affirmed in the *EC Report No. 2* in 1986. In implementing the MOI policy since 1986, the Government provided additional support for schools using the mother tongue as the MOI but schools were not compelled to adopt mother-tongue teaching. Instead, schools were allowed to decide their own MOI arrangement according to the needs and abilities of their students.

4. Nevertheless, under the policy of promoting mother-tongue teaching while allowing school-based decision on MOI arrangement, the majority of the secondary schools continued to profess the adoption of English as the MOI. In practice, however, it was common for EMI schools to actually use Chinese in teaching.

5. The EC suggested some adjustments to the MOI policy in its *Report No. 4* in 1990. The major recommendations included:

- (a) to develop objective assessment instruments to distinguish students into those who could receive EMI education and those, CMI education;
- (b) based on objective assessment results, to provide secondary schools with information on the Medium of Instruction Grouping Assessment (MIGA) to assist them in choosing their MOI and to assist the parents in selecting schools for their children;
- (c) to conduct regular reviews to monitor the progress in the adoption of mother-tongue teaching as well as to consider whether measures should be strengthened to achieve the objectives of encouraging schools to adopt mother-tongue teaching and minimizing mixed-code teaching; and
- (d) to provide bridging courses at different learning stages (e.g. S1, S4 and S6) to facilitate the transition and adjustment to EMI learning of those students who had to switch their MOI from Chinese to English.

6. Since 1994, the Government had started to provide schools with MIGA information which informed them of the overall suitability of their students for EMI/CMI teaching. However, many schools did not make changes to their MOI according to the MIGA information. It was still common for schools claiming to be EMI but actually using Chinese in teaching.

7. In its *Report No. 6* published in 1996, the EC stated that the Government should publicly indicate the appropriate MOI that each school should adopt. It also recommended promulgating clearly the sanctions for non-compliance. After extensive consultation, the Government published the *Guidance* in September 1997, reiterating its MOI policy and explaining the related philosophy and arrangement. According to the *Guidance*,

- (a) Schools should adopt mother-tongue teaching in all academic subjects starting from S1 in the 1998/99 school year, and in each subsequent year, mother-tongue teaching should be extended to the next higher level in the secondary education. Those wishing to use English as the MOI must demonstrate that they have satisfied the three prescribed criteria of student ability, teacher capability and support strategies and measures.
- (b) For schools adopting mother-tongue teaching at S1 to S3 levels, if they wish to switch to EMI teaching for certain subjects in some classes at S4 and S5, they must demonstrate that they have satisfied the three prescribed criteria of student ability, teacher capability and support strategies and measures.

- (c) For S6 and S7, schools may decide their MOI to be adopted, taking into account the circumstances and needs of their students.

8. Upon the implementation of the *Guidance*, of the 400-odd public sector secondary schools, 112 were permitted to adopt English as the MOI (the so-called EMI schools) while the rest, comprising over 300 schools, were required to use Chinese as the MOI in non-language subjects (the so-called CMI schools). Around half of the CMI schools continued to use Chinese as the MOI in most of the non-language subjects at S4 and S5 levels while the rest used English in some subjects or classes to various degrees. As for the S6 and S7 levels, most schools still used English as the MOI.

9. In 2000, the joint working group established under the former Board of Education and the SCOLAR conducted a review and considered that mother-tongue teaching had started to bear fruit and more time should be allowed for steady development of the policy. In addition, the EC was at that time conducting an overall review of the education system of Hong Kong, the recommendations on which might affect the MOI policy. Against this backdrop, the joint working group recommended the continuation of the arrangement under the *Guidance* until the 2003/04 school year when the MOI policy would be reviewed alongside the review of the SSPA mechanism to be conducted by the EC.

## **Analysis of the HKCEE Results**

The first two cohorts of students affected by the *Guidance* sat for the HKCEE in 2003 and 2004. Their performance and that of the 2002 HKCEE candidates (i.e. the last pre-*Guidance* cohort of students) were analyzed. Gist of the analysis is as follows:

(a) Overall performance

- (i) After the implementation of the *Guidance*, there was a general increase in the percentage of students obtaining five passes or more (pass rate) for CMI school students of the higher and medium ability groups. For the higher ability group, the HKCEE results in 2004 (i.e. students admitted to S1 in the second year of the implementation of the *Guidance*) registered an increase by 2.1% and 4.9% in the number of students obtaining five passes or more (pass rate) when compared respectively with those in 2003 (HKCEE results of students admitted to S1 in the first year of the implementation of the *Guidance*) and 2002 (HKCEE results of the last pre-*Guidance* cohort of students). For the medium ability group, the percentage increases were 1.8% and 3.4% respectively.
- (ii) After the implementation of the *Guidance*, the percentage of CMI school students obtaining a total score of 14 points or above in the six best-performed subjects was also increasing. When compared with those in 2003 and 2002, the percentage in 2004 increased by 1.2% and 1.4% respectively.
- (iii) For CMI schools switching to EMI teaching in all subjects in S4/S5, with the exception of a small number of schools, the percentage of students obtaining five passes or more dropped. When compared with that in 2002, there was a decline in the performance of these schools in most subjects in 2003 and 2004 though the drop became smaller in 2004.

(b) Performance in major academic subjects

- (i) Comparing the performance of CMI school students of the higher and medium ability groups in 2004 with that in 2002, there was a remarkable increase in the pass rates in most subjects (including Chinese Language, Mathematics, Geography, History, Economics and Biology). For example, the pass rates in Economics and Geography

of the higher ability group increased by 10.7% and 11.8% respectively after the implementation of the *Guidance*.

- (ii) It is noteworthy that the percentage of CMI school students obtaining Grade C or above in Mathematics, Biology, History and Geography also increased in 2004, with the highest increase at 7.3%.
- (c) Performance in English Language
- (i) As for English Language (Syllabus B), the overall pass rate of students in CMI schools in 2004 increased remarkably when compared to that in 2003.
  - (ii) Of the 200-odd schools switching to CMI teaching in 1998, about 80 schools had their pass rates in English Language exceeding the level obtained in 2002, doubling the number of some 40 schools in 2003.

## **Assessment of Student Ability**

### **(I) Conducting the Research Study**

In 2004, the EMB commissioned a research team from The Chinese University of Hong Kong to conduct studies to assess the percentage of S1 students in Hong Kong capable to learn through the English medium.

2. The research team employed a widely adopted standard setting procedure – the Angoff method – to analyze the ability required for S1 students to learn through EMI. Two other standard setting methods, namely the Bookmark method and the Contrasting Groups method, were used to triangulate the Angoff method.

3. The Angoff method

(a) By examining videotapes of lessons conducted in EMI for S1 classes, scrutinizing textbooks adopted by EMI schools and conducting group discussions, judges<sup>28</sup> deliberated on the minimum English competence required of S1 students to learn various subjects through English.

(b) Through repeated discussion and examination of each question item in the English Language test of the pre-S1 HKAT, the judges assessed the probability that a student at the “minimum level of English competence for EMI teaching” (“minimally competent student”) answered the item correctly.

(c) Finally, the judges arrived at a cutoff score for the whole test that a minimally competent student was expected to obtain. From the known territory-wide distribution of pre-S1 HKAT results, the percentage of S1 students in Hong Kong reaching the minimum standard required for EMI learning could be deduced from the cutoff score.

4. Results

(a) Using the Angoff method and gauging by the total score obtained in the pre-S1 HKAT test, about 32% - 40% of S1 students in Hong Kong were estimated to

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<sup>28</sup> The Chinese University of Hong Kong used the Angoff method to conduct two studies. The panel of judges in the first study comprised 34 teachers and parents (12 teachers of English Language, seven of Science/Mathematics and six of Social /Cultural subjects – all teachers had at least five years of teaching experience, of which at least two years were at junior secondary levels; three EMB education officers – majoring in English, Science/Mathematics and Social/Cultural subjects respectively; six parents – all had tertiary education qualifications. About one half of the members of the panel came from EMI schools and the other half from CMI schools). The composition of judges in the extension study comprised 30 teachers and parents (eight teachers in English Language, eight in Science/Mathematics and eight in Social /Cultural subjects, plus six parents).

be able to learn through the English medium. This percentage was very close to that obtained by the Contrasting Groups method (40%); however, the Bookmark method gave a lower percentage (28%).

- (b) Statistical analysis showed that during the standard setting process, the standards set by the judges were not significantly related to their background (e.g. gender, education, subjects taught, teaching at EMI/CMI schools, ability level of students taught, teaching experience, etc.). Moreover, the analysis also indicated a high reliability of ratings by the judges and that they were sensitive to the item content and difficulty<sup>29</sup>.

### **(II) Application of the Results**

5. The above study was conducted on the basis of the question items and distribution of results of the English Language paper of the pre-S1 HKAT. As a matter of fact, for determining the EMI-capable students, we could use the results of the English Language paper of the pre-S1 HKAT to scale the primary school IA results. However, this may induce schools, parents and students to put an undue emphasis on English Language, thus prejudicing a balanced pursuit of the curriculum.

6. Data analysis suggests a high correlation in results between the adoption of the English Language paper only of the pre-S1 HKAT and the adoption of the overall results in Chinese Language, English Language and Mathematics papers in the pre-S1 HKAT as an instrument to scale the IA results of P6 students. Therefore, the Working Group favours deriving the scale from the overall results in Chinese Language, English Language and Mathematics in the pre-S1 HKAT, since so doing would not entail any substantial impact on the scaled results, and could help ensure a balanced development of the primary school curriculum.

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<sup>29</sup> In the Angoff method, reliabilities were 0.8 for scales with six indicators and they increased to above 0.9 when the scales consisted of more than ten indicators. Mean correlation between judges' ratings and item difficulty was above 0.7.

**Support Measures to Promote English Proficiency**

(a) Additional teachers

- (i) Each secondary school using Chinese as the MOI may have one to four additional English Language teachers for its S1 to S3 classes (with the number of additional English Language teachers dependent on the number of classes at these levels).
- (ii) After the introduction of the *Guidance*, schools which continue to adopt mother-tongue teaching at S4 and S5 may have one additional teacher to strengthen the teaching and learning of English, depending on the total number of classes at these two levels and their percentage of CMI teaching.

(b) Provision of grants

- (i) Schools which adopt mother-tongue teaching are provided with additional recurrent grants for the purchase of teaching aids and library books, the precise amount of which depends on the number of S1 to S3 classes.
- (ii) Additional recurrent grants are provided to schools which continue to adopt mother-tongue teaching in most subjects/classes at S4 and S5.
- (iii) Schools which adopt mother-tongue teaching for the first time are provided with a one-off grant for recruiting clerical staff and purchasing equipment, etc. for the production of teaching materials.
- (iv) Starting from the 2000/01 school year, schools are provided with the Capacity Enhancement Grant and Operating Expenses Block Grant to enhance flexibility in resource deployment and to relieve teachers from non-teaching duties. Teachers can then focus more on teaching, tackling the diverse learning needs of students and enhancing students' language proficiency.
- (v) In the 1998/99 school year, the Language Fund provided a one-off grant for schools to set up "English Corners". Currently, the Fund also provides funding for schools to organize English enhancement camps and other language activities.

(c) Native-speaking English Teacher (NET) Scheme

- (i) The NET Scheme was first introduced to secondary schools in 1997 and was extended to primary schools in 2002. The Scheme aims to provide an authentic environment for students to learn English and to develop their confidence in using

English. The Scheme also provides an opportunity for NETs and local teachers to share successful experiences.

- (ii) Currently, each secondary school has one NET. To strengthen the teaching of English, schools using Chinese as the MOI may employ additional English Language teachers and one of them may be a NET.
- (d) Professional support
- (i) Language education is an important part of the curriculum reform. The Curriculum Development Institute (CDI) has been actively promoting related Collaborative Research and Development Projects (Seed Projects)<sup>30</sup> since 2001. In addition, the CDI has also held “Knowledge Fairs” to enable participating schools and teachers to share among themselves and with others the results of the Seed Projects.
  - (ii) The CDI also set up a Task Force of Teaching Consultants in the 2003/04 school year. About \$280 million has been allocated to provide on-site support for at least five years to help schools carry out the curriculum reforms. Seminars, workshops, homepage and thematic (e.g. language arts) networking activities have been arranged to enable professional exchanges between language teachers as well as the sharing among them of school-based experiences, good teaching practices and resources.
  - (iii) The Quality Education Fund, for the first time, organized the Chief Executive’s Award for Teaching Excellence in September 2004. It identified and gave recognition to good language teaching practices. It also financed awardees’ participation in local or overseas professional development activities and sharing of school experiences. The awardees will also form a “quality circle” to promote good teaching practices to other language teachers so as to facilitate the professional development of language teaching.
- (e) Development of resource packages and teaching kits
- (i) The EMB has developed various support programmes and materials for English learning in order to help enhance students’ motivation and effectiveness in learning English, as well as to assist those switching to EMI learning at senior secondary levels.

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<sup>30</sup> Two Seed Projects, viz. “The Learning and Teaching of Language Arts at Secondary Level” and “Self-Access Language Learning (SALL) in Hong Kong Secondary Schools” were implemented from 2001 to 2003 to assist teachers in the acquisition of professional support in English teaching.

- (ii) The support programmes/materials include the Language Enrichment Programme for junior secondary levels in CMI schools, booklets on assisting S4 students in switching to EMI learning and related teaching strategies, as well as programmes to assist S6 students in learning English effectively, etc. The relevant information has been uploaded onto the EMB homepage. Schools may adapt the materials to cater for the needs of their students.
  
- (iii) Other online resources include the Quality Education Fund Cyber Resource Centre and the Hong Kong Education City which contain valuable information, materials and project products on language teaching for teachers' reference.