



Hong Kong educational reforms in the last decade: reform syndrome and new developments

Hong Kong
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Abstract

Purpose – This paper aims to analyse the reform syndrome, bottle-neck effects and their impacts on teachers and school education in the last ten years and highlight the direction of new developments.

Design/methodology/approach – The paper examines educational reforms in Hong Kong in the last decade.

Findings – Echoing the international trends of educational reforms, Hong Kong, as an international city, has initiated a series of educational reforms in the past decades. The experiences of educational reforms in Hong Kong may provide a good case for understanding the dynamics of educational reforms and drawing theoretical and practical implications for research, policy formulation and implementation not only in Hong Kong but also in other international communities.

Originality/value – From the analysis of the reform syndrome, particularly the bottle-neck effect, there should be seven key aspects for policy-makers, educators and stakeholders in Hong Kong to address the emergent key issues in educational reforms and work for the further development of their education system in the coming few years.

Keywords Educational innovation, Educational policy

Paper type Research paper

Introduction

To meet the challenges of globalization, high technology, economic transformation, and international competitions in the new century, there have been numerous educational reforms and initiatives in many countries in the Asia-Pacific Region and other parts of the world (Cheng, 2005a, ch.7). As an international city where is the meeting point of the West and the East, Hong Kong has a strong tradition to echo the global trends in its development and has initiated a series of educational reforms in the past decades.

In a context of growing international trends of various educational reforms, the experiences of educational reforms in Hong Kong particularly in the past decade may provide a good case for understanding the dynamics of educational reforms and drawing theoretical and practical implications for research, policy formulation and implementation not only in Hong Kong and also in other international communities. Based on the observations in Hong Kong and the Region, this paper aims to analyse the reform syndrome, bottle-neck effects and their impacts on teachers and school education in the last ten years and highlight the direction of new developments.

This article was based on an invited keynote speech presented at the Annual Conference organized by the Hong Kong Professional Teachers Union on 8 March 2007. Parts of materials in this article were adapted from Cheng (2005a, ch. 8, 2005b, 2008).



The Hong Kong society has been experiencing numerous challenges of a great transformation due to the fast changing and competitive economic environment in the Asia-Pacific Region as well as the political transition in July 1997 from being a British colony to a Special Administrative Region (SAR) of China. In such a context, policy-makers and the public had new and high expectations of the role and functions of school education (Cheng, 2001). From 1984 to 2000, the Education Commission issued seven major reports (Education Commission, 1984, 1988, 1990, 1992, 1993, 1996, 1997) and a number of review reports and reform proposals (Education Commission, 1999a, 1999b, 2000a, 2000b). Also in the last ten years, the Education and Manpower Bureau implemented numerous initiatives to change nearly every key aspect of the school system, from the administrative structure to the curriculum organization; from the school governance and management to the classroom teaching and learning; from the application of information technology to the examination system; and from the school external and internal evaluation to the accountability to the stakeholders. Echoing the international trends, Hong Kong has experienced mainly two waves of educational reforms in the last two decades, like many other areas in the world (Cheng, 2005b; Cheng and Tam, 2007).

First wave of educational reforms

Since the 1980s, following the successful expansion of basic education systems to meet the needs of national economic developments, many policy-makers and educators in the Asia-Pacific Region began to pay attention to the improvement of internal process, including teaching and learning in schools. In India, South Korea, Singapore, Taiwan, Malaysia, Mainland China and other regional countries, numerous initiatives were evident to target at improving some important factors of internal school process, including school management, teacher quality, curriculum design, teaching methods, evaluation approaches, facilities, and environment for teaching and learning (Gopinathan and Ho, 2000; Kim, 2000; Abdullah, 2001; Rajput, 2001; Tang and Wu, 2000).

Like its regional counterparts, Hong Kong formulated its first wave of educational reforms through the Education Commission Reports No. 1 to 6 (Education Commission, 1984-1996). The initiatives covered the following areas in school education: language teaching and learning, teacher quality, private sector school improvements, curriculum development, teaching and learning conditions, and special education. The first wave of educational reforms in Hong Kong had its root in the assumption that the policy-makers have clear education aims and could find out the best practices to enhance effectiveness or the optimal solutions to solve major problems for all schools at the school-site level. These first wave initiatives were generally characterized by a top-down approach with an emphasis on external intervention or increasing resources input. Ignoring the school-based needs, the impacts of most initiatives proposed by the Education Commission were often limited, fragmented and short-term on improvement in school education (Cheng, 2000).

Second wave of educational reforms

In the 1990s, following the international movements towards marketization, accountability and quality in education with aims to satisfy stakeholders' expectations, the second wave of educational reforms emerged in different parts of the world. Most policy efforts were directed at ensuring the quality and accountability of

schools to the internal and external stakeholders (see, e.g. Coulson, 1999; Evans, 1999; Goertz and Duffy, 2001; Headington, 2000; Heller, 2001; Mahony and Hextall, 2000).

In some areas of the Region, such as South Korea, India, mainland China, Singapore, and Taiwan, there was a growing trend of educational reforms emphasizing quality assurance, school monitoring and review, parental choice, student coupons, marketization, school competitions, school-based management, parental and community involvement in governance, school charter, and performance-based funding (Mukhopadhyay, 2001; Mok *et al.*, 2003; Cheng and Townsend, 2000; Mohandas *et al.*, 2003; Pang *et al.*, 2003).

Hong Kong, like its counterparts in the Region, started similar second wave of education reforms through the Education Commission (1997) Report No. 7 and other initiatives proposed by the Hong Kong SAR Government since 1997. The key reforms and initiatives are summarized below.

School-based management and change in school governance

In 1991, the Education and Manpower Bureau (EMB) and Education Department of the Hong Kong Government initiated a new scheme, called “School Management Initiative” (SMI), to induce a type of school-based management framework to public sector schools. In just a few years of implementation, more and more school principals, teachers, and supervisors accepted the ideas and principles of school-based management. Witnessed was a clear diffusion of SMI ideas, concepts, skills, and experiences from pilot SMI schools to new SMI schools and from SMI schools to non-SMI schools (Cheng and Cheung, 1999). The Education Commission in 1997 had required all Hong Kong public sector schools to implement school-based management by 2000 (Education Commission, 1997).

In February 2000, the Advisory Committee on School-based Management published a consultation document to ask for strengthening the role, structure, and governance of school management for accountability in the transition towards school-based management. Since then, there had been a lot of public controversies between the school sponsoring bodies and the Government in restructuring the existing school governance that is heavily relying on volunteer school sponsoring bodies. As a measure to ensure accountability in school-based management, the “Education (Amendment) Ordinance, 2004” began to be enforced in 2005 and all aided schools will have to submit the draft constitutions of their Incorporated Management Committees (IMC) to EMB and establish them before 1 July 2009. Each IMC will have members of representatives of the school sponsoring body, the school principal, independent social constituencies, and elected parents, teachers and alumni, responsible for management of their schools. With this change, the original school governance will be going to shift from the school sponsoring bodies to a group of various stakeholders and all IMCs will be under direct supervision, monitoring and intervention of EMB instead of school sponsoring bodies.

Report No. 7 – Measures for quality education

To pursue quality school education, the Education Commission in its *Report No. 7* recommended the following measures in 1997:

- schools should be facilitated to set goals and indicators for monitoring and evaluating quality education;
- all schools should have put in place school-based management in the spirit of SMI by the year 2000 as the internal quality assurance mechanism;

- Education Department adopts a whole-school approach to quality assurance inspection and sets up a quality assurance resource corner;
- all schools which have put in place school-based management should enjoy the management and funding flexibility under the SMI;
- government should set aside a substantial amount of money to establish a “Quality Education Development Fund” to fund one-off projects for the improvement of education quality on a competitive basis; and
- government should raise professional standards of principals and teachers through providing coherent pre-service and in-service trainings and setting up a General Teaching Council, and all schools should be required to put in place a fair and open performance appraisal system for principals and teachers.

These policy recommendations adopted a school-based approach to establishing a more comprehensive mechanism for education quality assurance and school effectiveness. With reference to this report, a series of initiatives in education with long lasting impacts were implemented by the new government established in 1997.

New government's initiatives since 1997

After the handover of Hong Kong sovereignty from UK to China in 1997, the first Chief Executive of the Hong Kong Special Administration Region (SAR), Mr Tung Chee-hwa (Tung, 1997a,b) presented in his Policy Address an important blueprint for the educational development of Hong Kong in the new century. It supported the measures proposed by the Education Commission Report No. 7. It also set a time schedule to review and streamline the education-related executive and advisory structure. It asked the Education Commission to conduct a thorough review of the structure of pre-primary, primary, secondary, and tertiary education, as well as the school curriculum and examination system, while the Board of Education had at the same time completed a review of 9-year compulsory education (Board of Education, 1997).

Since this policy address, a number of reviews and initiatives on key aspects of school education had been conducted. The key progress of these developments is summarized as follows (Cheng, 2005b):

New reform proposals 2000

In 1999 and 2000, the Education Commission had reviewed the education aims and structures and formulated new framework and proposals to reform the early childhood education, school education, tertiary education and continuing education (Education Commission, 1999a, 1999b, 2000a, 2000b). The Commission claimed to adopt the principles including student-focused, “no-loser,” quality, life-wide learning, and society-wide mobilization. The focuses of the whole reform package are summarized as below:

- reforming the admission systems and public examinations so as to break down barriers and create room for all;
- reforming the curricula and improving teaching methods;
- improving the assessment mechanism to supplement learning and teaching;
- providing more diverse opportunities for lifelong learning at senior secondary level and beyond;

- formulating an effective resources strategy;
- enhancing the professionalism of teachers; and
- implementing measures to support frontline educators

Since the proposals covered a wide range of crucial issues and large-scale changes and had to be implemented in a short period, they had raised a lot of debates and concerns. Even though the directions and principles of education reforms proposed were generally welcome by the public, how and why these proposals and recommendations can be effective to serve the principles of education reforms and new aims of education in practice remained a major concern among the public. Particularly without clear research evidences and pilot studies to support these proposals, it was really difficult to convince the public or educators that they are feasible, effective, and practical to be implemented.

Curriculum change in nine years' universal education

Echoing the new education aims, principles and proposals of reform proposed by the Education Commission in 1999 and 2000, the Curriculum Development Council published its proposals on curriculum change and development in November 2000 (Curriculum Development Council, 2001). It proposed some guiding principles in planning a new curriculum framework for nine-years universal education, that aims to provide schools with a structure for outlining and developing different curriculum modes. It was hoped that, with this framework, the teaching contents can be flexibly rearranged, modified or replaced in response to the needs of society and to suit different needs of students. The key components of the curriculum framework include eight Key Learning Areas, Generic Skills, and Values and Attitudes. The council also proposed a schedule which last beyond ten years for implementing curriculum reform: short-term strategies (2000-2005), medium-term strategies (2005-2010), and long-term strategies (2010 and beyond). In the short-term development, it is expected that:

- based on the principles of the curriculum reform, the Education Department will develop new curriculum guides, subject guides and exemplars, and teaching/learning materials; engage in research and development projects and disseminate good practices;
- teachers and schools can promote learning to learn through infusing generic skills into existing school subjects;
- the following key tasks have been shown to be useful strategies for promoting learning to learn: Moral and Civic Education, Promoting a Reading Culture, Project Learning and Use of Information Technology; and
- schools can prepare for the transition to the new curriculum framework and gradually develop a school-based curriculum, using the new framework to suit the needs of students and schools.

In the medium-term development, schools should have followed the central directions and used the curriculum guides of the open framework provided to develop a school-based curriculum most suited to the abilities and needs of students and the mission of the schools. They should continue to raise their quality of teaching and learning. And finally, in the long-term development, the vision for lifelong learning can be achieved.

Since this curriculum framework was quite different from the traditional model with strong emphasis on development of school-based curriculum, most schools and teachers had to spend a lot of time and effort to “scratch from the beginning”, learn the related ideas and skills from retraining, re-develop their school curriculum in different subject areas, and practice them in classrooms. In such a large-scale reform in school curriculum together with other parallel initiatives imposed by EMB, many teachers were inevitably overloaded and frustrated when the professional support, time, resources and preparation were not sufficient in its implementation.

Changes in senior secondary education and higher education

In 2004, the Education and Manpower Bureau (EMB) proposed to change the senior secondary education and higher education system from the existing British system (3 + 2 + 2 + 3) towards a new academic structure (3 + 3 + 4). After the consultation from October 2004 to January 2005, EMB formally announced in May 2005 the change towards this new academic structure together with comprehensive reforms in senior secondary curriculum and the public examination (Education and Manpower Bureau, 2005). The primary 5 students in 2004/2005 school year will be the first cohort to enter the new academic structure which will start from 2009/2010 school year.

Under the new “3 + 3 + 4” academic structure, all students will enjoy six years of secondary education; and all students will have a senior secondary student learning profile including results in the Hong Kong Diploma of Secondary Education (HKDSE) examination and other achievements during the senior secondary years. Students will take a completely new senior secondary (NSS) curriculum, including 4 core subjects (Chinese Language, English Language, Mathematics and Liberal Studies), 2 to 3 electives from 20 NSS subjects and/or a wide range of course from career-oriented studies (COS), and other learning experiences.

In addition to fundamental changes in curriculum, there will be drastic changes in the public examinations including the components of school-based assessment that will be very demanding on additional effort and time of teachers in their daily operation and potentially affecting the learning ecology in classrooms towards examination-oriented. Given the large-scale changes in nearly every key aspects of the senior secondary education, how the parents, frontline teachers, school principals, education officers, and change agents at different levels can be well prepared to implement these changes successfully has been very controversial in the policy-debates.

Medium of instruction and allocation of school places

Just after the handover of Hong Kong sovereignty to China in July 1997, the Education Department issued the Guidance for Secondary School on Medium of Instruction (MOI) in September 1997 to encourage secondary schools to use Chinese as MOI and to discourage the use of mixed code (i.e. a mixture of Chinese and English) in teaching and learning. Those schools wishing to use or to continue using English as MOI with their 1998/1999 and future Secondary 1 intake should demonstrate to ED that they satisfy the following three requirements necessary for the effective use of English as MOI:

- (1) student ability to be an average percentage of not less than 85 per cent of students who are able to learn effectively in English in Secondary 1 intake for the past three years;

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- (2) teacher capability of using English as MOI; and
 - (3) support strategies and programmes to give sound school-based assistance to students.

Finally, with these requirements, only 114 secondary schools were allowed to be EMI schools (using English as MOI) and over 300 other secondary schools had to be CMI schools (using Chinese as MOI). This policy was coercively implemented since 1997 and had been reviewed by a working group of Education Commission in 2005 (Working Group, Education Commission, 2005). Up to now, it still meets consistently very strong complaints and criticisms from parents, students, teachers, schools and scholars these years (Cheng, 2005c). In general, CMI schools were suffered from being perceived as weaker schools for less able students and parents were strongly dissatisfied with. After ten-year implementation, it has been evident in research that:

- those intake students of equal academic ability in CMI schools were much disadvantaged in gaining entrance to universities when compared with those in EMI schools (*South China Morning Post*, 2008); and
- there was a clear trend in the results of public examinations of both certificate level and advanced level that the overall performance of Hong Kong students in English was significantly declining across years after the implementation of the MOI policy (Cheng, 2005d).

In 2008, the Education Bureau (previous EMB) has openly recognized the problems of the existing MOI policy and indicated to make some modifications giving secondary schools more autonomy in deciding their school-based MOI policy (*Sing Tao Daily*, 2008). The modifications are still under consultation with concerned parties.

Traditionally, primary graduates were classified into five bands and allocated to secondary schools according to the average scores of their schools as well as their own scores calibrated by their school scores in the public Academic Aptitude Test (AAT). Band 1 represented the best groups of students and Band 5 represented the weakest group. In general, Band 1 students had the better choice of EMI secondary schools or those schools they liked. Correspondingly, schools with majority of Band 1 student intake became Band 1 schools and those with majority of Band 5 students became Band 5 schools. In 2000, Education Department cancelled the AAT and implemented a transitional arrangement for allocation of primary graduates to secondary schools. The banding of students for allocation to secondary schools was reduced from a five-band system into a three-band system according to the performance of their schools in AAT in the past three years. In other words, since 2000, the individual differences of students within each band or each secondary school were largely increased and consequently the difficulties of handling individual differences and meeting diverse needs of students in teaching and other educational services were drastically increased within each public secondary school in Hong Kong. Without a comprehensive package of professional and resources support to schools and frontline teachers, the whole secondary education at teachers, schools and system levels was suffering from the drastic increase in structural difficulties due to increased diversities and differences among students.

School self-evaluation and external school review

Echoing the international movements on educational quality assurance in 1990s as well as Education Commission Report No. 7, the Education Department (1997) established the Quality Assurance Inspection (QAI) Section in 1997, responsible for planning the overall inspection and developing a system of performance indicators. All aided schools were required to conduct school self-evaluation and report annually their self-evaluation findings, achievements, reflection and follow-up actions in the School Report (SR) that should be endorsed by the school management committee (SMC) and uploaded onto schools' own website before the end of November every year.

Starting from 2004, EMB implemented external school review (ESR) to validate schools' self-evaluation activities once every four years. To support ESR, schools were required to conduct beforehand an assessment of school performance in fourteen areas which cover the four domains set out in EMB's Performance Indicators framework. Since the reports of ESR were uploaded on the web of EMB and widely and selectively reported in the public media, the reputation of many reviewed schools was seriously damaged from such kind of reporting particularly in a context of serious competitions between schools due to the fast declining student populations. School self-evaluation and ESR became a nightmare to most schools and teachers during the whole process of preparation, implementation and outcomes. Most aided schools and teachers had to put them as a top priority and make their great effort to prepare them. In addition to other ongoing educational reforms, school self-evaluation and ESR were in fact creating tremendous pressure and serious anxieties on teachers and principals and distracting their attention and effort away from the core purposes of school improvement and student learning (Education and Manpower Bureau, 2005). As a compromise, in July 2005 EMB finally announced to stop the uploading of External School Review (ESR) reports on the web and modified the requirements of preparation and documentation for ESR.

Since 2004, EMB implemented the Territory-wide System Assessment (TSA) to measure the progress of students from Primary 3 through Primary 6 to Secondary 3 against a professionally defined standard of basic competency in Chinese Language, English Language and Mathematics. It was hoped that TSA can help identify students' strengths and weaknesses and has generated a wealth of information that can be used by schools and teachers in improving the learning and teaching process (www.edb.gov.hk/index.aspx?nodeid=5094&langno=1). At the same time, the results from TSA could become part of monitoring measures to inform school self evaluation and ESR for quality assurance and accountability at both school-site level and system level.

Information technology in education

In 1997, the SAR Government started to invest substantial resources to the implementation of a series of IT initiatives in school education. In 1998, the Education and Manpower Bureau (EMB) had published its policy paper, "Information Technology for Learning in a New Era", to outline a five-year strategy (1998/1999-2002/2003) for promoting IT in Education, with the missions as follows: To provide adequate IT facilities, including network facilities, for our students and teachers to enable them to access information; To encourage key players in the school system to take up the challenges of their respective new roles; To integrate IT into school education meaningfully through necessary curriculum and resource support;

and To foster the emergence of a community-wide environment conducive to the culture change (Education and Manpower Bureau, 1998). In July 2004, the Government further updated the strategy for promoting IT in education.

From the past experiences of education reforms, mere large-scale resources input and training are not sufficient to bring effective changes and outcomes in the classroom and at the school level. Up to now, how the school management and professional culture can match the huge investment in IT hardware and training, and transform them into effectiveness, quality, and relevance in education at the site and individual levels is still a challenging question to the reformers of IT in education in Hong Kong. As pointed by Cheng (2006a,b,c), there should be paradigm shifts in using IT in learning and teaching in echoing the paradigm shifts in education towards globalization, localization and individualization in education as well as development of students' contextualized multiple intelligences for sustainable development in the future. Reflecting on the limitations of techno-centric strategies on use of IT in education, Education Bureau (EDB, the previous EMB) proposed the third strategy on IT in education to meet the changing needs of schools, teachers, and students as their capacity to use IT in the learning and teaching process develops (Education Bureau, 2007).

The new IT strategy puts the priorities to reduce the burden on teachers in integrating IT into their core activities from lesson planning to assessment of students, continue to sharpen teachers' IT pedagogical skills, generate a favourable environment at the school level, and equip parents with the skills to guide their children to use IT to learn at home. Specifically, the following actions will be taken in future (Education Bureau, 2007):

- to provide a depository of curriculum-based teaching modules with appropriate digital resources;
- to continue to sharpen teachers' IT pedagogical skills;
- to assist schools to draw up and implement school-based IT in education development plans;
- to enable schools to maintain effective IT facilities;
- to strengthen technical support to schools and teachers; and
- to collaborate with non-governmental organizations to raise information literacy of parents and launch parental guidance programmes on e-learning at home.

Quality education fund

Aiming to encourage school-based innovations and initiatives for promoting the quality of education, the SAR Government established the Quality Education Fund (QEF) on 2 January 1998 with an allocation of \$5 billion. It mainly supported worthwhile non-profit-making initiatives for basic education, including pre-primary, primary, secondary, and special education. It covers the projects on promoting the quality of teaching and learning in schools; projects promoting all-round education; school-based management projects; and educational research (Quality Education Fund, 1998). After a few years of implementation, the practice and effectiveness of QEF had been reviewed. It is clear that many school-based initiatives have been encouraged and promoted by the generous financial support of QEF in these years. However at the same time how a comprehensive knowledge base for an effective practice of school

education in Hong Kong can be generated and accumulated from the numerous school-based initiatives is still an important issue. In particular, many schools had spent their scarce resources (particularly teachers' time and energy) to "invent a wheel" or "scratch from beginning" in a fragmented and piecemeal way when they implemented their school-based initiatives particularly in the area of using information technology in education.

Teacher education and principal training

Both the Advisory Committee on Teacher Education and Qualifications (ACTEQ) (2003) and University Grants Committee (UGC) of the Hong Kong SAR Government started in 1997 to review the existing in-service and pre-service teacher education in Hong Kong respectively. They finished their reports in January and February 1998 and submitted them to the Government. Emphases were made on the development of an all trained and all graduate teaching profession. Also, all in-service teachers were encouraged to pursue continuing professional development.

In November 2003, the ACTEQ published a document entitled "Towards a Learning Profession: The Teacher Competencies Framework and the Continuing Professional Development (CDP) of Teachers". This document provided a generic Teacher Competencies Framework (TCF) for facilitating teachers' professional development in general and also provided reference for teachers and schools in formulating CPD plans specific to the person and appropriate to the school at a particular time. Schools were asked to put CDP on the school development agenda and teachers were required to pursue professional development activities of not less than 150 hours during the three-year "try-out period".

The leadership role of school principals has become crucial to effective implementation of educational changes and school-based management. The Government had set up various task forces or committees to establish a framework requesting aspiring principals, newly appointed principals and serving principals to pursue continuing professional development and enhance leadership competence (Task Group on Training and Development of School Heads, 1999; Education Department, 2002). Given the educational initiatives so complex at the school site-level, how principals would have the necessary competence to lead and implement them in such a short time is a really crucial issue.

As described above, there were so many parallel initiatives in different areas of school education in the last decade, requiring teachers to implement them. Before and during the implementation, inevitably teachers were required by their schools or the Government to take various kinds of assigned courses, seminars and workshops with an aim that they could achieve the necessary knowledge, skills and competences to implement the planned changes in their schools such as school-based curriculum, school-based assessment, new curriculum subjects, school-based management, school self-evaluation, extended learning experiences for students, home-school collaboration, language proficiency for EMI or Putunghua teaching, managing increased individual differences and diversities in classroom, using IT in teaching, learning and management, inclusive education, etc. In addition to the numerous ongoing educational initiatives, the continuously increased activities of teacher professional development and training themselves became a serious burden to teachers in these years.

Reform syndrome in Hong Kong

The discussion of educational reforms in Hong Kong should be put in the larger context of the Asia-Pacific Region. In the past two decades, there had been nine trends of education reforms at four levels of education systems in the Asia-Pacific Region and other parts of the world. At the macro-level, the main trends include: towards re-establishing a new national vision and educational aims; towards restructuring an education system at different levels; and towards market-driving, privatising and diversifying education. At the meso-level, increasing parental and community involvement in education and management is a salient trend. At the site-level, the major trends are: ensuring education quality, standards and accountability; increasing decentralisation and school-based management; and enhancing teacher quality and the continuous lifelong professional development of teachers and principals. At the operational level, the main trends include using information technology in learning and teaching and applying new technologies in management, and making a paradigm shift in learning, teaching and assessment (Cheng, 2005a, ch. 7). To a great extent, the education reforms in Hong Kong shared most key features of these international trends and could be considered as part of international movement of education changes and developments in response to the challenges of globalization and international competitions in the new century.

Owing to the serious international or regional competitions, when one country in the Asia-Pacific Region was going to initiate educational reforms, other regional competitors also conduct their reforms and initiate more changes in their education systems. As part of globalization influence, most competitors would follow the emerging international trends of educational reforms (e.g. education accountability, quality assurance review, school-based management, marketization, etc) as soon as possible. This was the reasonable why many countries and areas in the world shared similar patterns or trends in educational reforms (Cheng, 2005a, Ch.7). There appeared some key features of an educational reform syndrome across the region:

- the educational reforms have been mutually influenced or infected among countries and areas in the region, sharing some common patterns of reform behaviors;
- they were often eager to achieve the reform targets in a very short time and implement many initiatives in parallel;
- they often ignored their own cultural and contextual conditions in implementation of educational reforms;
- they worried losing their country competitiveness if they did not reform as fast as possible; and
- then there resulted in too many parallel reforms with chaos and painful failures to the education sector (Cheng, 2008).

Unfortunately there is emerging evidence of negative impacts of this syndrome with so many concurrent reforms on the education system and teachers in some areas, with Hong Kong as a salient example. The over competitions from marketization, the close control from accountability measures, the increasing workload from numerous initiatives, the de-professionalization from over management and monitoring and the high pressure from uncertainties and ambiguities in education environment are some

typical problems that potentially damage teachers' well being and working conditions including being burnt-out and overburdened with unnecessary busy works, declining status of the teaching profession, losing competent teachers, and deteriorating quality of teaching and learning (Cheng, 2007).

Bottle-neck effect in educational reforms

The educational reform syndrome in Hong Kong can be further illustrated by the phenomenon of “bottle-neck effect” in the reform process (Cheng, 2004a, 29 March-5 April). The effect is the situation that any new educational initiatives with good will and sufficient training support to teachers can become additional burdens and limitations on teachers and schools and the initiatives themselves also jam or block at the “bottle-neck” and hinder the implementation of other new coming reforms, as illustrated in Figure 1. The more reforms initiated, the more hindrance jammed at the “bottle-neck” and the more pressure on teachers and schools. Why did such “bottle-neck effect” happen in the Hong Kong educational reforms?

The structural reasons for formation of such “bottle-neck” in Hong Kong education can be explained as follows:

- *High workload and large class size.* Before the second wave of educational reforms, the workload of Hong Kong teachers was already very high, more than 30 lessons (normally 40 minutes each) each week. Also, the number of students in each normal class was often in a range of 35-40. Compared with those teachers in Europe, North America and Australia, the teachers in Asia are in general higher. But, the Hong Kong teachers had nearly double teaching load and took care of

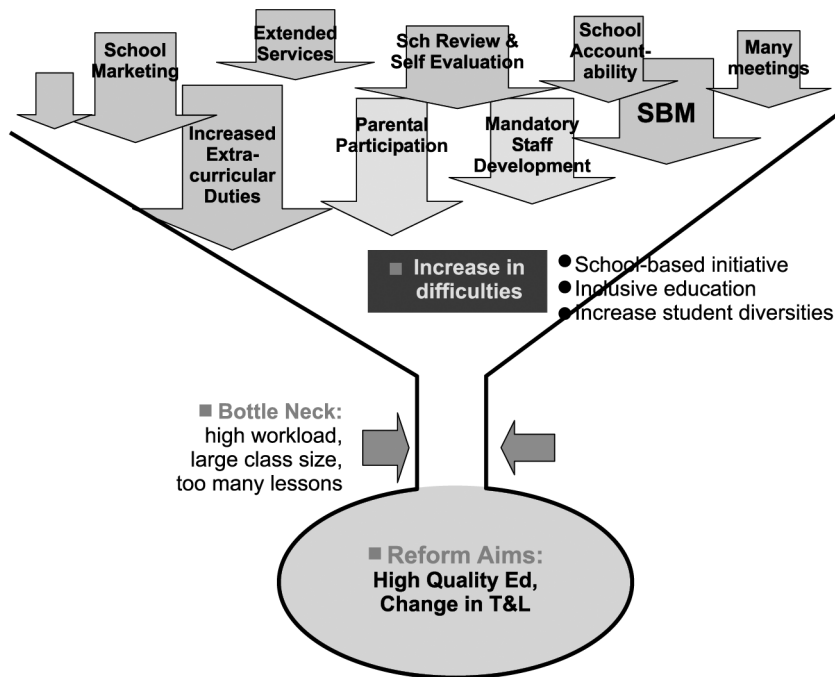


Figure 1.
Reform syndrome in Hong Kong: bottle-neck effect

20-30 per cent more students than those teachers in Beijing, Shanghai, and Taipei (Ng and Koa, 2003). Such high workload and large class size set a very tight constraint on Hong Kong teachers' teaching approaches and strategies that tended to be teacher-centred and direct teaching and have no time to take care of students' individual differences and needs in learning. Unfortunately, the initiated educational reforms had paid no attention to this structural constraint on teachers even though they emphasized the changes in teaching and learning from teacher-centred methods towards student-centred approaches as well as the provision of all round quality education to students in the reforms. In other words, the existing high workload and large class size became the structural part of the "bottle-neck" hindering the change of teaching and learning towards high quality education.

- *Drastically increased structural difficulties in education.* As mentioned in the previous section, the educational reforms converted the students banding from five bands to three bands such that the individual differences were drastically increased within the school and within the class in a very short period. Inevitably this structural change largely increased the difficulties in teachers' teaching and taking care of students' development as well as the management cost of provision of educational services.

During the educational reforms, the implementation of inclusive education without corresponding sufficient support package also immediately and largely increased the individual differences and related difficulties on teachers' work. This structural change also further requested more efforts, time and energy from teachers.

The educational reforms strongly implemented school-based management, school-based curriculum, school-based innovations and integrated curriculum that requested nearly all teachers to give up their familiar teaching materials, methods, curriculum and styles and start from the beginning to prepare new teaching curriculum and materials according to the new curriculum framework and school-based needs. The challenges, difficulties, and work pressure were inevitably increased very much beyond teachers' capacity.

With the existence of "bottle-neck" in school education, many new initiatives with very good intention had become heavy burdens to teachers and schools. For example, educational reforms involved not only technical changes but also cultural changes and additional professional training for teachers and principals were necessary. Since there were so many parallel initiatives, teachers and principals had to take many kinds of training workshops and programmes in order to meet the mandatory requirements of these reforms, including language proficiency benchmarks, curriculum development training, information technology training, middle management training, subject training, degree qualifications in subject area, new concepts and skills of teaching and assessment, etc. When teachers were suffering from the "bottle-neck" of super-high workload and drastically increased difficulties, this kind of mandatory professional training and development inevitably became additional large hindrance and pressure to them. They had to use up more and more their after-school time or personal time on Sunday and holidays to attend. Unfortunately, this also wasted a lot of their time and effort that should be put to take care of students.

Similarly, the other parallel initiatives with good will also experienced the “bottle-neck” effect and became serious burdens with high pressure on teachers and schools. As shown in Figure 1, they included school self-evaluation, external school review, parental involvement in school management, school marketing in the local community, extended professional services to parents and the community, more responsibilities of co-curricula activities, various types of quality assurance measures and reporting, and teacher participation in school-based management and development. It should be noted that most of these initiatives were not directly related to the core business of their teaching and students’ learning but teachers had to spend a lot of time and effort to deal with them.

Complicated with class reduction and school closure

In the past few years, the educational reforms were also complicated with the reduction in school-age population. The primary school enrolment dropped from 445,607 in 2000 to 366,531 in 2006 and the drop was 79,076 students, nearly 21.6 per cent primary student population. With this substantial reduction in student population, many schools and classes were closed due to insufficient numbers of enrolled students.

In such a declining context, school survival and competition for student intake were key concerns among teachers and principals particularly in those areas of fast dropping school-age population. They had to struggle very hard in school marketing for their survival. They were very sensitive to the initiatives of educational reforms and often exhausted all their energy and time with serious anxiety and tension to do them particularly those related to their survival, such as extended services, school reporting, school self evaluation, external review, school publicity and community promotion. In other words, the school closure and class reduction were making a frightening effect on many schools and their teachers in implementing the educational reforms and strongly reinforced the “bottle-neck effect”, creating further high pressure and anxiety on teachers and exhausting their energy and time but unfortunately not so much on enhancing teaching and learning.

Impacts of bottle-neck effect on teachers

The bottle-neck effect of educational reforms has had wide and negative impacts on teachers and the whole teaching profession since 2000. In 2004 when the implementation of educational reforms was at the high peak, there were emerging evidences of negative impacts documented by five different sources (Cheng, 2004b):

- (1) *Research Report on Teachers in Four Cities* by K.C. Ng and W. Y. Koa (2003).
- (2) *Survey Report on Teachers’ Work Pressure* by Hong Kong Professional Teachers’ Union (3 November 2003).
- (3) *Survey Report on the Health of Primary School Teachers* by the Hong Kong Cosmo Physiotherapy Centre (7 May 2004).
- (4) *Report on Teachers’ Work Pressure* by The Hong Kong Federation of Education Workers (9 June 2004).
- (5) *Report on Hong Kong Teachers’ Mood* by the Hong Kong Mood Disorder Centre of the Chinese University of Hong Kong (30 June 2004).

Even though these research reports were conducted by different professional bodies or scholars from different perspectives in different time frameworks, their findings consistently revealed a big picture of teachers' physical, psychological, and working conditions in crisis due to educational reforms:

- *Mood disorders and suicide tendency.* The Hong Kong Mood Disorders Centre (2004) reported that nearly 25.2 per cent of Hong Kong teachers tended to have mood disorders. Among them, 19.7 per cent had symptom of suppression 13.8 per cent with frequent anxiety and 8.3 per cent with both. But for the general city citizens of Hong Kong, the percentage of frequent anxiety was only 4.1 per cent. According to the estimation of this report, there might be nearly 12,000 out of 50,000 teachers in Hong Kong with mood disorders. Both this report and the report from the Hong Kong Federation of Education Workers (2004) found out with different methods, that around 2,000 to 2,500 teachers (4-5.2 per cent) had the tendency of suicide. The teachers and school education were in a very serious situation.
- *Over-high pressure and resignation.* The symptom of mood disorders so widely existing among Hong Kong teachers was closely related to the continuously increasing work pressure from the bottle-neck effect of so many parallel educational reforms and the frightening effect of school closure. The reports from the Hong Kong Cosmo Physiotherapy Centre (2004), Hong Kong Federation of Education Workers (2004) and Hong Kong Professional Teachers' Union (2003) consistently found out that around 50-52 per cent primary and secondary teachers felt their work out of control and they were suffering from over high work pressure. The symptom of insomnia (50.9 per cent), losing temper (48.6 per cent), and being physically comfortless (46.6 per cent) was very common among teachers.

The teachers' morale was very low. The reports of Hong Kong Mood Disorders Centre (2004), Hong Kong Federation of Education Workers (2004) and Hong Kong Professional Teachers' Union (2003) pointed out that around 37-56 per cent of Hong Kong teachers in consideration of resignation. Why did the whole teaching profession fall in such a collapsing crisis?

- *Super high workload.* Nearly all reports consistently found out that the workload of Hong Kong teachers was super high in the period of educational reforms. The daily workload was around 11 to 14 hours, in a total of around 67 hours per week, that was much higher than those teachers in Taipei (50 hrs), Shanghai (55 hrs), Beijing (63 hrs) and Macau (63 hrs). According to the findings in UK, the weekly workload of more than 54 hours was the main reason for resignation of many teachers (Ng and Koa, 2003).

The reports of Hong Kong Mood Disorders Centre, Hong Kong Federation of Education Workers and Hong Kong Professional Teachers' Union also revealed that implementation of educational reforms (88-97 per cent), school administrative work (65-96 per cent per cent) and additional requirements of professional training (62-90 per cent) were the major sources of spiritual pressure and work pressure on teachers.

The above findings provided important evidences of the wide negative impacts of reform syndrome in terms of the bottle-neck effect on the sustainability of Hong Kong education system and the professional wellbeing of teachers.

Conclusion: new developments

From the above analysis of the reform syndrome particularly the bottle-neck effect, there should be seven key aspects for policy-makers, educators and stakeholders in Hong Kong to address the emergent key issues in educational reforms and work for the further developments of their education system in coming few years, as suggested in Cheng (2006d):

- *To release the conditions of school closure policy.* The school closure policy has produced a large frightening effect on teachers and has worsened the negative impacts of the bottle-neck effect of educational reforms on the whole system. It is suggested that there should be clear short, middle and long-term school policies and planning that can provide a clear and stable prospect of educational developments and release the conditions and associated severe pressure of school closure and class reduction on teachers and schools. This will be helpful for schools, teachers and students to have an appropriate environment for quality education and implementation of educational changes.
- *To break through the bottle-neck.* The large class size of students and heavy workload of teachers are two key structural factors of the “bottle-neck” limiting the educational change from the teacher-centred approach towards the student-centred approach. Taking the opportunity of resources saved from the school-age population reduction in these years, there should be a explicit policy and planning to implement small class teaching and reduce teachers’ heavy workload such that the core mission of educational reforms with focus on students’ new learning and all round development can be realized in classrooms.
- *To reduce the structural difficulties.* Different measures should be adopted to reduce the individual differences and diversities within school and within class such that teachers and students can have a comparatively reasonable and manageable environment to teach and learn. The review and adjustment of inclusive education implemented in the mainstream schools with aims at reducing the internal structural difficulties will be helpful. Even though school-based initiatives and innovations have their own advantages, that too many schools and teachers have to “discover” their own wheels or scratch from the beginning will certainly waste a lot of their time and energy but ignore the core tasks to closely facilitate students’ learning. There is really a strong need for a high level central platform that can provide the necessary professional and technical support to teaching and curriculum development instead of piecemeal school-based initiatives.
- *To review the implementation and impacts of ongoing educational initiatives.* Educational reforms have been implemented nearly ten years. It should be the right time to have a comprehensive review of the progress and consequences of ongoing educational reforms and if necessary there should be some modifications or adjustments on the overall implementation or individual initiatives. In particular, the coming academic restructuring of senior secondary education is so comprehensive including fundamental changes in its structure, curriculum and assessment and therefore a review of its scope and pace with reference to the existing conditions of teachers will be helpful to its success in implementation in 2009.

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- *To rebuild the image and confidence of the teaching profession.* The professional status, image and confidence of teaching profession had suffered a lot from the process of educational reforms in the past ten years. There will be long-term negative impacts on the effectiveness and quality of school education as well as the teaching profession. The Government, school sectors and teachers organizations should immediately work together and develop some short and long term measures to re-build the self confidence and public professional image of the teaching profession.
 - *To re-establish the alliances for education.* The traditional partnership and trust between the Government and various school sponsoring bodies and education organizations were the important assets of Hong Kong educational development. They have been damaged by the struggles and conflicts during the ten years of educational reforms. The Government should take the initiative to re-build the mutual trust relationships, re-develop the alliances with various stakeholders and re-create a collaborative and harmony environment for further development of Hong Kong education.
 - *To re-strengthen the knowledge base for leadership and policy.* The contemporary educational reforms are very complicated, involving not only changes in technology, structure, quantity and resource but also ecological transformation in educational paradigms, professional beliefs and social culture. Their policy formulation and implementation need not only the general leadership competence and administrative skills but also the whole spectrum of professional knowledge and systemic wisdom. The reform syndrome and the bottle-neck effect were in fact due to the ignorance of the ecology of education system in policy making and implementation. Therefore, the leadership and policy making for educational reforms should require the support of a comprehensive knowledge base including the necessary empirical pilot studies, full range of advisory expertise, and wide consultations and debates at different levels to build up the legitimacy, validity, and feasibility of the policies.

After the protest of over 10,000 teachers at the beginning of 2006, the Government began to understand the serious negative impacts of educational reforms on teachers and schools and immediately announced nine measures in a total of 1.8 billion HK dollars to address the issues of high work pressure on teachers. Also a committee on studying the work pressure on teachers was established to investigate the details of problems and recommend the solutions. At the end of 2006 and in mid 2007, the Government replaced the Permanent Secretary for Education and the Secretary for Education respectively. In his policy address on 1 July 2007, the Chief Executive of Special Administrative Region Government promised some measures to redress the issues related to the teachers' professional situation and their working conditions.

Since his appointment, the new Secretary for Education has conducted numerous consultations with various stakeholders in education and started some initiatives to adjust the ongoing educational reforms and improve the working conditions for teachers and students in 2008. The initiatives include implementing small class teaching policy, lowering the standards for school closure, tuning down the pace and scope of implementing school-based assessment, adjusting the ongoing policies such as Medium of Instruction (MOI) policy, recovering the communication with the major

school bodies and education organizations, enhancing the salary of beginning teachers, increasing graduate teacher ratios in both primary and secondary schools and establishing the vice-principal posts at primary schools. To a great extent, these initiatives by the New Secretary for Education are in line with the above seven key aspects, receiving good responses from schools and teachers in Hong Kong. The atmosphere of Hong Kong education circle is becoming positive and encouraging to these new developments.

In facing up the challenges of globalization, Hong Kong and people in other countries have shown their strong commitments to education reforms for enhancing social and economic developments in the new century. The international reform syndrome across the Asia-Pacific region and the case of Hong Kong bottle-neck effect in educational reforms in the past ten years can really provide a very painful lesson for those interested to pursue educational development and improvement through a series of educational reforms. Many reforms with good will can become a nightmare or disaster to teachers, schools and the whole community if they are organized and implemented forcefully with ignorance.

It is hoped that the case of Hong Kong including the ongoing education experiments, reform experiences, improvement practices, and related analyses will benefit the Hong Kong people and contribute to the international communities in their education reforms for the future.

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