Introduction

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The fundamental basis of comparative studies of all kinds is identification of similarities and differences. From this identification, analysis usually proceeds to the reasons for the similarities and differences, and to the conceptual implications of the forces which shape the objects being compared.

The field of comparative education resembles all other comparative fields in this respect. Major questions for analysts in the field of comparative education concern the reasons why education systems in different parts of the world are similar to and/or different from each other. Additional questions concern the links between education systems and the broader societies which those education systems serve. Education systems on the one hand reflect the societies in which they are situated, and on the other hand shape those societies.

Meaningful analysis is facilitated when the units for comparison have sufficient similarity as well as significant difference. In this light, Hong Kong and Macao make an ideal pair for comparison. This book shows that the conceptual lessons from comparison of Hong Kong and Macao go far beyond the small corner of East Asia in which the two territories are located.

To expand on this point, this Introduction begins by outlining the major similarities and differences in Hong Kong and Macao. It then turns to comments on the nature of continuity and change in education and society, and to specific aspects of education and political and social transition with which the book is particularly concerned. The next section explains the way in which the book is organised, and outlines the contents of each chapter.

Hong Kong and Macao: Similarities and Differences

For comparative studies of the type presented here, analysis of education systems must be couched within the framework of contextual features. For this reason, it is useful to commence with an outline of political, social and economic similarities and differences.

The most obvious similarities between Hong Kong and Macao are in location and in political history. Both territories are located on the south coast of China; both have been colonies of European powers; and both are now Special Administrative Regions (SARs) within the People's Republic of China (PRC). The chapter in this book by Adamson and Li describes the two territories as siblings. Macao, the chapter points out (p.35), is "the introspective elder – outshone, overshadowed and greatly influenced by the more gifted and extrovert junior"; but the two territories exist in

parallel and mutual support. They operate economic, political and social systems which resemble each other but are significantly different from those in the rest of the PRC. Pursuing the metaphor of the family, China is commonly referred to as the motherland. Adamson and Li point out that the motherland was until recently politically, economically and socially estranged, and that the reunification has resulted "in a familial accommodation of differences rather than a whole-hearted embrace". Commonalities in evolving attitudes towards the motherland are further elements of similarity between Hong Kong and Macao.

As distinguishable entities, Hong Kong and Macao are products of colonialism. Macao emerged as part of the Portuguese empire in the 16th century (C.M.B. Cheng 1999). It was chiefly needed as a port in which ships could anchor and be repaired, and as a base for trade with China and other parts of Asia. Geographically, the territory of Macao comprises the Macao peninsula and the offshore islands of Taipa and Coloane. The Portuguese arrived in southern China in 1513. Macao was ceded to the Portuguese in 1557 by the Chinese government in exchange for banishment of pirates in the Pearl River Delta. In 1974, Macao was redefined as a "Chinese territory under Portuguese administration". The 1987 Sino-Portuguese Joint Declaration set a timetable for full reversion of sovereignty to the PRC on 20 December 1999 (Shipp 1997).

Hong Kong was established as a separate entity three centuries later than Macao, but again was chiefly valued by the British as a port and as a base for trade within the region (Endacott 1964). Geographically, the territory of Hong Kong comprises Hong Kong Island which was ceded to the British in 1841, the Kowloon Peninsula which was added in 1860, and the New Territories which were leased for 99 years in 1898. The scheduled expiry of the lease in 1997 was the chief factor setting the timetable for the reversion of sovereignty over Hong Kong to the PRC on 1 July of that year. Although strictly speaking the lease applied only to the New Territories and not to Hong Kong Island or the Kowloon Peninsula, it was clear to negotiators on both sides that the component parts could no longer be separated. Because of this, the whole of the territory of Hong Kong was returned to Chinese sovereignty, including the parts that had been ceded "in perpetuity". The initial arrangements for the change of sovereignty were set out in a Sino-British Joint Declaration in 1984.

These comments show that similarities in the political histories of the two territories are not confined to colonial origins, for both have had a common destiny in the contemporary era. Although Macao had been colonised earlier than Hong Kong, its reversion of sovereignty occurred slightly later. The political negotiations allowed Hong Kong to retain many of its existing characteristics, including its legal, financial and educational systems. While China remained officially socialist, Hong Kong remained officially capitalist. This formula was known as 'one country, two systems', and set the model for Macao's subsequent reversion of sovereignty (S.H.S. Lo 1993). The Basic Law for Macao was modelled on that already prepared for Hong Kong.

The similarities do not end there. Among other common features, some of which are identified in Table 0.1, are that:

- both are small in area;
- both are small in population, especially compared with their immediate neighbours;
- both are urban societies, with insignificant agricultural sectors;
- in both territories, the great majority of inhabitants are Cantonese-speaking

Chinese;
- both have efficient financial infrastructures and free market economies with simple taxation systems;
- both have highly productive and competitive workforces; and
- both have efficient telecommunications and transport systems, providing easy access to mainland China and other parts of the world.

Table 0.1: Characteristics of Hong Kong and Macao

	Hong Kong	Macao
Land area (sq. km.)	1,097	27
Population	6,816,000	441,600
Population density (people per sq. km.)	6,200	16,400
Ethnicity	95% Chinese; 2% Filipino; 3% other	96% Chinese; 2% Portuguese; 1% Filipino; 1% other
GDP per head (US$)	24,000	15,432
Official Languages	Chinese and English	Chinese and Portuguese
Currency	Hong Kong Dollar (HK$)	Pataca (MOP)
Exchange rate	US$1 = HK$7.8	US$1 = MOP8.0

Note: Data refer to 2002.

Sources: Hong Kong, Information Services Department (2003); Macao, Department of Statistics & Census (2003).

Despite these similarities, major differences are also apparent. Among them are the following:

- Although in global terms both territories are small in area, Hong Kong is considerably larger than Macao. Hong Kong's land area is 1,097 square kilometres, compared with just 27 square kilometres in Macao.
- Hong Kong's population is much larger: 6,816,000 in 2002 compared with 441,600 in Macao.
- Unlike Hong Kong, Macao has a significant Portuguese minority – though this minority is considerably smaller than it was before 1999.
- Although both territories have high per capita incomes compared with most parts of the region, Hong Kong's per capita incomes are higher than those of Macao.
- Although the economies of both territories are mainly based on the service sector, in Macao the sector is dominated by gambling. Macao sees itself in this respect as the "Las Vegas of the East", whereas Hong Kong has a stronger role in the financial sector and as a regional headquarters for large companies.
- In both territories, Chinese is an official language. However, one legacy of Macao's period under Portuguese administration is that Portuguese is the other official language. By contrast, one legacy of British administration in Hong Kong is that English is the other official language in that territory.

Turning specifically to education, again similarities and differences are evident. The main similarities are in the formal nature of schooling, some parts of the

curriculum, some sponsoring bodies, and high enrolment rates. However, the structure and important aspects of the content of education differ significantly in the two territories.

One final observation under the heading of similarities and differences is that because Hong Kong and Macao have much in common, they can also be taken as a pair to contrast with other parts of the world. One particular theme in this book concerns colonial transition. The transitions in Hong Kong and Macao differed from most other colonial transitions because they occurred at the end of the 20th century rather than earlier. Also, the transitions were to reintegration with the country from which the colonies had previously been detached rather than to sovereign independence. As in other domains, politics and education have shaped each other: political forces have shaped the scale and content of education, and the nature of education has to some extent shaped the landscape of politics. In this and other respects, although the book primarily focuses on only two territories it can contribute to much wider understanding. Indeed most chapters make specific comparisons and contrasts not only between Hong Kong and Macao as separate entities but also between Hong Kong and Macao as a pair and other parts of the world.

Education and Society in the Context of Continuity and Change

One major theme running through all chapters, as indicated in the subtitle of the book, is continuity and change. A huge literature focuses on change in education systems. By contrast, the literature on continuity is relatively modest – even though continuity is in many respects more important than change. Sometimes this continuity is a desirable form of stability, whereas on other occasions it is an undesirable resistance to change. Whatever the case, it is arguable that continuity deserves much more attention than it usually receives. This point is elaborated upon in the last chapter of the book.

While the main part of the book focuses on continuity and change during the 20th century, the production of a second edition five years after the first permits analysis of continuity and change during the turbulent years at the beginning of the 21st century. These were the initial postcolonial years for both Hong Kong and Macao; and political changes were compounded by economic and technological changes. As the various chapters show, however, much continuity was also evident in the education systems. This again can be viewed either positively or negatively, depending on the dimensions being scrutinised and the perspectives of the observer.

Analysts sometimes note that education systems in Asia and the Pacific are primarily oriented towards coping with the 'here and now' issues and solving current problems. As observed by UNESCO (1990, p.21):

> Education helps by providing knowledge and understanding through the development of skills and the promotion of attitudes which future citizens will need in order to cope with the diverse issues they face. However, education systems often are not 'forward looking' because … most education systems have been oriented towards immediate problems: building and enlarging schools, providing better and sufficient equipment and books, and training teachers. Little time has remained to lift the gaze from the immediate issues to look ahead and engage in forward planning to better cope with what is likely to occur.

In Hong Kong and Macao, different phases of history have certainly brought different pressures. The main colonial periods were rather different from the transitional periods and postcolonial periods. This observation highlights the fact that patterns may change significantly over time.

Related to this observation is the need to analyse contextual forces in order to achieve full understanding. Oliver (1996, p.3) pointed out that "as education exists primarily in a changing social context, it is almost certain that it will be accompanied by continual transition". However, changes in a system may have different meanings, effects, and implications to different groups of people. As Oliver added (p.3):

> If change is viewed as a series of isolated events, which upset the pleasant stability of things, then it will be perceived as something to fear, and something to avoid wherever possible. On the other hand, change can be viewed as simply a continuous process of evolution, whereby transition is part of the normal sequence of events. There may well be times of greater change and lesser change, but generally an organisation or educational system is perceived as being in a state of natural flux.

Within this framework, Oliver argued, individuals will develop new approaches to change. Thus one cannot necessarily assume that continuity is comfortable and that change is threatening. Again, the analysis of patterns in Hong Kong and Macao provides an instructive illustration of this observation.

Organisation and Contents of the Book

One particular feature of the book is that each chapter is comparative, focusing on both Hong Kong and Macao. This distinguishes it from most other works of its type (see Bray 2003a; Crossley & Watson 2003). Indeed, many works in the field of comparative education are in practice only implicitly comparative. Instead they focus on single areas, and leave it to readers to make the comparisons. The fact that each chapter in the present book addresses both Hong Kong and Macao permits the comparisons to be much more direct and informative. As observed above, most contributors also go beyond this, taking Hong Kong and Macao as a pair and making comparisons with other parts of the world.

In structure, the 15 chapters of the book are divided into four parts. As might be expected, the parts to some extent overlap; but they also form discreet and coherent units within the book. The first part focuses on levels and sub-sectors, namely preschool education, primary and secondary education, higher education, teacher education, and lifelong learning and adult education. The second part focuses on political, economic and social issues. The four chapters in this part address church and state in education, higher education and colonialism, education and the labour force, and language and education. The third part turns to curriculum policies and processes. It begins with a general chapter on curriculum reform before moving to specific chapters on civic and political education, on history curricula, and on mathematics curricula. Finally, the volume concludes with chapters on methodology and focus in comparative education as illustrated by this book, and on the overall lessons for continuity and change.

To elaborate on this outline, several comments may be made on individual

chapters. The first chapter, by Wong and Rao, explores the development of preschool education in Hong Kong and Macao. It particularly notes changes before and after the signature of the 1984 (for Hong Kong) and 1987 (for Macao) Joint Declarations with China in terms of curricula, school operations, educational resources, teacher training, and government policies. Wong and Rao point out that in Hong Kong the colonial authorities never considered preschool education to be part of basic education, arguing that it was desirable but not essential and thus not demanding substantial investment of government resources. The Macao government, by contrast, adopted a more favourable policy and considered the final year of kindergarten to be part of basic education for the fee-free education scheme. Although other sectors of education have arguably been more advanced in Hong Kong than in Macao, this has not been the case at the preschool level. However, the chapter identifies many complexities in the nature of instruction, the curriculum, and the quality of education.

The chapter by Adamson and Li examines primary and secondary schooling. The chapter argues that the fact that Hong Kong and Macao share a similar history, geography, ethnicity and postcolonial fate has created significant similarities in the nature of schooling. In turn, colonial history has provided both territories with education systems that are very different from the system in the motherland. These differences have been sustained in the postcolonial era, though some elements of convergence can be identified.

Developments and changes in higher education, along with the labour market and the associated transitions in the needs of both local and global industry, have led to new challenges for university graduates. Yung examines the structure and development of higher education in Hong Kong and Macao in terms of two spheres of knowledge in higher education, namely quantitative-structural, and organisation and governance. In both territories, the expansion of higher education in the 1990s offered increasing access to academic qualifications. However, the increasing cost of higher education, coupled with keen competition in the labour market, made investment in higher education less worthwhile from the perspectives of stakeholders. Partly to avoid the high costs of local university education, increasing numbers of students, particularly in Macao, chose to further their education in mainland universities. At the same time, Hong Kong and Macao both hosted increasing numbers of mainland students in search of specialisms and external connections not so readily available on the mainland. Macao's system of higher education was more market-oriented than Hong Kong's; but radical changes were embarked on in Hong Kong, in part because of economic factors and the forces of globalisation.

Teacher education is another domain which continually faces the challenges of socio-political and other changes. The chapter by Li and Kwo focuses on patterns of teacher education development in a historical perspective. It notes the limited proportions of trained local teachers in both Hong Kong and Macao, and the strategies adopted in the 1980s and 1990s to tackle the situation. Hong Kong achieved quantitative targets earlier than Macao and then turned to quality. Macao has made more use of expertise in mainland China to upgrade its teaching force.

Turning to lifelong learning and adult education, the chapter by Aliana Leong observes that provision in Hong Kong has a longer history than that in Macau, but that in both territories economic and demographic changes have sharply altered both supply and demand. Increased integration with mainland China, and the forces of globalisation, which were accelerated when China joined the World Trade

Organisation (WTO) in 2001, further shape the nature of lifelong learning and adult education in the pair of territories. The chapter provides an important complement to the analysis in other chapters of formal mainstream schooling and higher education.

Beatrice Leung's chapter begins the second part of the book with analysis of relationships between church, state and education during the colonial periods. As in many other colonies, in both Hong Kong and Macao the churches and governments worked in partnership to provide education and other social services. With the approach of reunification with the motherland, church leaders and their congregations were concerned about the implications of operation under a communist government. However, Leung points out that the long period of political transition provided opportunities for churches to prepare; and in the event the government in Beijing proved much more flexible than had been feared. The postcolonial period brought various pressures, but they were rather different from those that had been anticipated. They were relatively minor tussles over language policy, school-level management and curricular adjustment, and in general the major force was of continuity rather than change.

Hui and Poon also have strong historical perspectives. They analyse the ways in which the colonial states intervened in the development of higher education in Hong Kong and Macao, using it as a means for imperial expansion. Through four case studies – St. Paul's University College, the University of Hong Kong, the University of East Asia, and the Hong Kong Baptist College – the chapter shows similarities, variations and trends in the ways that higher education was controlled by the two colonial states. Hui and Poon argue that in the past, state control of higher education was a means of regulating social mobility. The 1990s brought considerable expansion, and this much reduced the previously elitist nature of the sector.

Ma's chapter explores the links between education and the labour force, particularly in relation to economic development and supply of highly educated personnel. Changes in the benefits and costs of education raise policy questions about the ways in which local and overseas graduates can be made more employable. One way to do this is through courses which combine academic education with specialised training in broad basic skills.

Bray and Koo's work on language and education provides the last chapter in this part of the book. Again the complexities of policy-making during the main colonial, late colonial and postcolonial periods make fascinating material for analysis. In Hong Kong the questions were about the respective roles of English, Cantonese and Putonghua; and in Macao the questions were about the roles of all of these plus Portuguese. Hong Kong policy-makers and practitioners faced major complexities, but their counterparts in Macao arguably faced even greater challenges.

The third part of the book, which focuses on curriculum policies and processes, commences with a chapter by Lo. This chapter analyses and contrasts various areas of curriculum reform in the two territories. The Hong Kong authorities tended initially to adopt the stimulus-response model and then the rational model. The Macao authorities favoured the rational model in their educational reform, along with the use of stimulus response in the face of ad hoc events.

During the build-up to reintegration with China, the study of civic education gained major attention in both Hong Kong and Macao. Tse provides a detailed account of continuity and change in political education in the two territories, and discusses the implications for future civic education programmes. Tse notes that in

both places the reforms in civic education produced changes which, as in many other postcolonial societies, were likely to be more apparent than real. The major institutional constraint, he suggests, lay in the conservative constitutional framework adopted in Hong Kong and Macao.

The following chapter, by Tan, focuses on the history curriculum. Using literature review, interviews, and analysis of the history curricula of selected secondary schools in Hong Kong and Macao, Tan examines the development of the history curriculum during colonial transition. Because of the centralised nature of the curriculum in Hong Kong, wide variations in the political content were not found there. However, the uncoordinated nature of Macao's educational systems allowed pro-PRC, pro-Taiwan, and Lusocentric curricula to coexist and evolve.

The final chapter in this part, by Tang, focuses on mathematics curriculum. Using Margaret Archer's morphogenetic systems theory as a basis for part of his study, Tang examines the nature and causes of stability and change in Hong Kong and Macao. Macao's idiosyncratic socio-historical background and the more visible effects of links with the mainland were the major influences responsible for its different curriculum development track in mathematics. Thus, local socio-historical background and efforts of local mathematics educators must be identified for the understanding of stability and change in these places.

The fourth part of the book contains two concluding chapters by Bray. The first comments on the previous chapters within the framework of methodological literature in the field of comparative education. Illuminating the approaches used by the various authors, the chapter adds useful discussion to the broader literature on methodology in the field. The second chapter discusses the principles of continuity and change in education. It revisits the model used by Thomas and Postlethwaite in 1983, and also incorporates insights from other literatures. The chapter shows ways in which the book adds to understanding not only of Hong Kong and Macao but also of other parts of the world.

A Note on Spelling

Possible confusion exists in English concerning the alternative spelling of Macao as Macau. During the initial centuries of the colonial period, in Portuguese the territory was called Macao. During the 19th century the Portuguese authorities changed the spelling to Macau, and in the Portuguese language that remains the spelling of the name. However in English some people, especially ones outside the territory, preferred to spell the name Macao even after the change of spelling in Portuguese; and after the 1999 resumption of sovereignty, the authorities in Beijing announced that that would be the spelling in English (Bruning 2001). The Macao authorities issued an internal circular on the matter, and since that date government publications in English have used the spelling Macao. The first edition of this book was published in 1999, i.e. before the announcement of this policy, and spelled the territory's name as Macau. This second edition follows the new official spelling, i.e. Macao.

However, various complexities remain. Following the announcement of government policy, some institutions changed the spelling in the English versions of their names but others did not; and in any case, whereas Portuguese is an official language, English is not. This creates some diversity when referring to single

institutions in different languages and at different points in time. It also creates diversity when referring to different institutions at single points in time. This book has endeavoured to find a balance between accuracy and consistency, but with emphasis on faithful reproduction of the spelling used in the sources cited. When citing Portuguese-language publications, the spelling is Macau; but when translating Chinese-language publications into English, the spelling is Macao. When citing English-language publications, the spelling follows that of the publications themselves. The spelling in the names of institutions follows that of the institutions themselves at the particular point in time.

For the sake of comparison, it is worth adding that for much of the 19th and early 20th centuries, Hong Kong was more commonly written as Hongkong. Thus the chapter by Hui and Poon contains a statement from Sir Frederick Lugard, who was governor of the territory from 1907 to 1912. The chapter is accurate in its quotations about "taxpayers in Hongkong" (Lugard 1910, p.1) and "the Hongkong University" (Lugard 1912, p.3). However, this form of writing the territory's name lost general currency, and for the present book it does not create as much confusion as Macao/Macau.

Conclusions

This Introduction has provided some background, an overview of broad areas of education and society, and an indication of the structure of the book. Hong Kong and Macao are similar in their colonial histories, ethnic composition, geographic location, and status as SARs of China. However, significant differences exist within their social, political and economic systems. This pattern has an impact on education as well as on other sectors, and helps explain many aspects of continuity and change.

Underlying each chapter in the book are several common premises. They include the following:

- the phenomena of continuity and change relate to all aspects and levels of education and society;
- some aspects of the relationship between education and social processes of continuity and change are universal, but patterns are complex and differ in individual societies;
- education in general, and schooling and curriculum processes in particular, can be understood more deeply if contextualised within wider frameworks;
- comprehension of the complex phenomena associated with educational processes is enhanced by comparative and multidisciplinary analysis and interpretation.

Finally, although the first edition of this book took its subject much further than previous studies, and the second edition takes it further still with the addition of two chapters and thorough updating of the rest, a great deal remains to be done. Individual components of education systems could be examined in greater detail; and the processes of change will require continuing monitoring and analysis. It is hoped that scholars will take the book as the basis for further work, thereby extending exploration more widely and deepening understanding of the processes of continuity and change in education and society.