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## Language and Education

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A considerable literature focuses on language and education in Hong Kong. Parts of this literature are related to policies, and other parts focus on processes of teaching and learning. The literature on language and education in Macao is smaller, but is also significant. In the space available, this chapter cannot present a comprehensive summary of these literatures. However, it does highlight core themes, particularly in the domains of policy formulation and implementation. It shows that, as in other topics, instructive insights can be gained from juxtaposition of patterns in the two territories.

The chapter analyses patterns within the framework of colonialism and post-colonialism, and accordingly commences with broad remarks on those matters. It then looks separately at developments in Hong Kong and Macao in historical sequence. A further section focuses on international schools; and the final part identifies major lessons from the comparison.

### Colonialism and Postcolonialism

In the literature on colonialism and education, language has been recognised as a crucial determinant of identity and power relations (see e.g. Carnoy 1974; Phillipson 1992; Pennycook 1994; Clayton 2000). Language was often used as a tool of domination and exploitation, allowing those in power to reinforce their will and privileged position.

Beyond such general observations, Hailey (1957, pp.1226-1229), in remarks which focused on Africa but which also had wider application, noted differences in the policies of different colonial powers. French colonial policies, he observed, stressed the use of the French language from the first day of primary school. British policies, by contrast, encouraged the use of vernaculars in primary school and the shift to English only at higher levels. Portuguese policies were in some respects similar to French ones, but the Portuguese colonial authorities gave little encouragement to the education of local peoples in any language. In all colonies, of course, policies and practices moved through different phases at different points in time.

Postcolonial eras brought both expansion and reorientation of education. Some postcolonial states vigorously promoted local languages in place of colonial ones. For example, the Tanzanian government replaced English with Swahili in much of its education system; the Pakistan government emphasised Urdu instead of English; the Indonesian government stressed Bahasa Indonesia instead of Dutch; and the Malaysian government emphasised Malay rather than English.

Nowhere was the shift unproblematic, however. The choice of single national languages in those countries was made despite the existence of other languages. Also, the emphasis on national languages reduced channels of communication with external communities that did not use those languages. Further, national languages were easier to justify at lower levels of education than at higher levels, since essential domains of scientific and technical knowledge could not all be translated into national languages.

In other postcolonial contexts, policy makers retained an ongoing major role for the colonial languages. In some cases this was because their countries did not have single dominant languages which could become national languages without serious dispute. In this sense, the colonial languages had an element of neutrality in the face of competing claims among other national languages. Thus Kyrgyzstan, for example, retained Russian as the only official language despite the existence of significant local languages; and similarly Papua New Guinea retained English as the only official language. Other states, such as India and Madagascar, did make local languages official ones, but did so alongside the colonial ones. In some settings, the colonial language was a force for unification and for differentiation from neighbouring states. This was a strong emphasis in Singapore, for example, which used English to bring together different racial and language groups and to distinguish Singapore from Malaysia and other countries. More recently, Portuguese has been made an official language in East Timor in order to strengthen the country's identity and distinguish it from Indonesia.

Some patterns have however changed with the advance of globalisation and the need for strong international discourse (Watson 2001; Crystal 2003). Perceptions of international isolation caused a relaxation of advocacy of national languages in Pakistan and Malaysia, and some resurgence of what had been the colonial language but what was now perceived more as an international language than as a colonial one. With a similar goal of access to international affairs, English has become the favoured foreign language in Cambodia, Laos and Vietnam, displacing the French colonial language; and in Rwanda, English has been made an official language alongside French and Kinyarwanda. Hong Kong has the benefit that its colonial language is also an international language (Johnson 2001), whereas Portuguese has much more limited use as a lingua franca. Yet even if English can be described as an international rather than a colonial language, its spread and use still has political implications and is arguably part of a neocolonial framework which has replaced one form of colonialism with another (Phillipson 1992; Maurais 2003).

## **Language and Education in Hong Kong**

### *The Main Colonial Period*

Sweeting (1991b) presented a comprehensive account of the history of language policies in Hong Kong, from which key elements may be extracted here. He began by noting (p.67) that the first government-aided schools in the initial years after 1842 had been founded by Chinese people in some of the villages on Hong Kong island. The language of instruction in these first government-aided schools was Chinese. After about a decade, attempts were made to spread the use of English in some schools, though they formed a small minority.

In 1862, the authorities opened the first government-run institution, the Central

School. Sweeting reported (1991b, p.68) that within a few years its first headmaster, Frederick Stewart:

was able to begin to satisfy the demand of Chinese parents for education in English and the Central School gradually became famous for this.... At the same time, Frederick Stewart remained convinced that, however much the parents might seek education in English for their sons, it was his duty to insist that education in his school be based on a very firm foundation of Chinese. For this reason, he maintained Chinese studies, through the medium of Chinese and taught by local Chinese teachers, as one of the two major streams in the Central School.

The first main signs of conflict over language policy developed in the mid-1870s. A newly-appointed Governor, John Pope Hennessy, declared himself shocked at the poor standard of English in the Central School. Heated discussions between Hennessy and Stewart led to an "Educational Conference" in 1878 which tilted the balance towards English. This decision, however, was made only by a narrow vote and on the claim that that was what the local Chinese parents wanted. Also, it only applied to the Central School; and the vast majority of pupils were being educated in Chinese schools which substantially increased in number as the century proceeded.

The next major development occurred at the beginning of the 20<sup>th</sup> century. A 1902 report (quoted by Sweeting 1991b, p.70) asserted the need to "enlighten the ignorance of the upper classes of the Chinese" and advocated stronger attention to Anglo-Chinese schools than to Vernacular schools. During the following decade, the balance was tilted further with the establishment in 1911 of the English-medium University of Hong Kong (Lin 2002).

Nevertheless, during the next three decades enthusiasm for Chinese-medium education was promoted by increased migration to Hong Kong from mainland China, nationalist identity among segments of the local population following the establishment of the Republic of China in 1911, and, during some periods, sympathetic views in the colonial hierarchy (Yu 1987, p.23). During the 1930s and 1940s, many educators in mainland China fled to Hong Kong where they established schools and continued their educational endeavours. Also, from 1926 onwards the government itself set up a number of directly-maintained vernacular schools. A 1935 official report (Burney 1935, p.25) added weight to the Chinese orientation with the view that:

educational policy in the Colony should be gradually re-orientated so as eventually to secure for the pupils, first, a command of their own language sufficient for all needs of thought and expression, and secondly, a command of English limited to the satisfaction of vocational demands.

However, this recommendation was not followed up decisively for some decades, and all forms of planning were disrupted by World War II.

After the war, some schools moved back to the mainland. Further, following the establishment of Communist China and particularly during the Cold War and the Cultural Revolution, Hong Kong as a British colony lost much of its contact with the mainland (Morris & Sweeting 1991). Nevertheless, the majority of schools, not only primary but also secondary, taught in Chinese. In 1963 the government created the second university alongside the University of Hong Kong. The new institution was the Chinese University of Hong Kong, and provided a route for graduates of

Chinese-medium secondary schools to proceed to Chinese-medium tertiary education.

The 1970s and 1980s were characterised by economic boom, and the territory became known as one of the Four Little Dragons of East Asia. Mainland China reclaimed its seat in the United Nations, and gradually opened its doors. Motivated in part by the increasing trade and international relations, in 1974 the Hong Kong government enacted an Official Languages Ordinance which made Chinese an official language alongside English. However, the impact on the education system was restricted. Most primary schools had long taught through Chinese, but the secondary sector saw a gradual drift to English. Whereas in 1960 57.9 per cent of secondary schools claimed to be English-medium, by 1980 this had become 87.7 per cent (Lee 1998, p.166). The drift chiefly reflected the aspirations of parents who perceived English-medium education to confer stronger benefits in the labour market.

### *The Late Colonial Period*

Major change in language policy came with the signing of the Sino-British Joint Declaration in 1984 and the subsequent process of localisation in the government. During the transitional period, several initiatives regarding language in education were launched. For instance, a 1989 report (Hong Kong, Education Department 1989, p.71) recommended that:

attention should now be focussed on the consolidation and strengthening of current good practices in language teaching on the one hand, and on coherent longer-term planning for languages in education on the other.

The report recommended establishment of a Language Planning Unit and of an Institute of Language in Education. It also recommended development of a diagnostic instrument to determine the language competence of students, and that “once an appropriate diagnostic instrument is available, schools should be advised to restrict English-medium education to those students judged able to benefit from it” (p.74). Meanwhile, the report recommended (pp.73-74) that within the existing medium of instruction policy, the education system should aim to ensure that:

- each student is educated through the medium most likely to lead to maximum cognitive and academic development;
- English or Chinese can be equally effectively used as a medium of instruction up to A level for students studying in the one language or the other;
- English and Chinese are taught as subjects as effectively as possible, bearing in mind their roles as actual or future mediums of instruction for different groups of students; and
- students are enabled to make as quick, smooth and effective a switch from Chinese to English as possible at whatever point it is judged appropriate and/or necessary for them to do so.

The Basic Law, which provided Hong Kong’s constitution for the post-1997 era, was finalised in 1990 and added further impetus to discussions on language. Article 9 (China 1990) stated that “in addition to the Chinese language, English may also be used as an official language by the executive authorities, legislature and judiciary”. This gave Chinese higher status, but it nevertheless provided an ongoing official role for English for at least 50 years after the 1997 change of sovereignty.

The approval of the Basic Law also brought into focus various issues for the remaining years of the colonial era. The 1989 report (Hong Kong, Education Department 1989, p.74) had been critical of “mixed code”, in which classes used both English and Chinese in a mixed way. The criticism was echoed the following year by Commission Report No.4 (Education Commission 1990, p.96), which asserted that the practice was detrimental to the learning of both languages. The government in due course endorsed the Education Commission report, declaring that Chinese needed to be strengthened and that many schools should be encouraged to teach in that language rather than in mixed code. However, these statements mostly remained at the level of exhortation (Poon 2000). Ironically, the colonial government advocated Chinese rather than English but the general populace remained more interested in English-medium education for their children because they still considered it to confer stronger prospects in the labour market. Market demand for English thus remained strong even though many pupils were not learning effectively through the language. Secondary schools did not wish to declare themselves Chinese-medium, for fear of losing attractiveness in the market. By 1990, 91.7 per cent of secondary schools claimed to teach in English, compared with 87.7 per cent in 1980 (Lee 1998, p.166).

When the above statements referred to Chinese, in the written form they meant Modern Standard Chinese which is used in all parts of Greater China (i.e. mainland China, Hong Kong, Macao and Taiwan). However, whereas the mainland had moved to a system of simplified characters, Hong Kong (along with Macao and Taiwan) retained the traditional complex characters. In the spoken form, the statements about Chinese in Hong Kong generally meant Cantonese, the dominant dialect of the majority in the population.

The prospect of reunification with mainland China brought to the fore Putonghua, the official spoken form of Chinese in the mainland. For example, the 1989 report (Hong Kong, Education Department 1989, p.83) recommended that trainee-teachers of Chinese in the Colleges of Education should be encouraged to study Putonghua, and that Putonghua “should continue to be offered to all those who have an interest in it and some background experience of it”. Education Commission Report No.5 went further with the recommendation (Education Commission 1995, p.56) that Putonghua “should become part of the core curriculum for all primary and secondary students”. It noted approvingly (p.27) that the government had committed an annual recurrent provision of HK\$10 million starting from 1996/97 for improving and expanding the teaching and learning of Putonghua, and that new curricula were being devised for both primary and secondary levels. These measures fitted with developments in the broader society. As explained by Adamson and Auyeung Lai (1997, pp.87-88):

Hong Kong’s language patterns prior to the 1997 hand-over were predominantly those of *biglossia*, whereby the Hong Kong Cantonese variety of Chinese and English were used side by side.... As the return of Hong Kong to Chinese sovereignty approached, language patterns underwent major shifts towards *triglossia* to incorporate Putonghua at both the formal and informal levels. These took the form of, *inter alia*, the increase in job advertisements specifying competence in Putonghua, the introduction of television programmes teaching Putonghua, the increase in programmes and advertisements in Putonghua and Hong Kong pop stars producing albums in Putonghua as a supplement to their Cantonese productions.

The chapters in this book by Yung and by Ma comment on dimensions of higher education which also have relevance. Until the early 1990s, local supply of higher education in Hong Kong was very restricted and many students went abroad. Taiwan was a destination for Chinese-medium studies, but much larger cohorts of students proceeded to English-medium countries and especially Australia, Canada, UK and USA. With the domestic higher education expansion in the 1990s, the number of students going abroad dropped but nevertheless remained significant.

### *The Postcolonial Period*

The medium of instruction in secondary schools was among the first major themes to be tackled by the postcolonial government. The colonial government had felt unable to force schools to switch from English to Chinese, but the postcolonial government had less hesitation.

The first Policy Address by the Secretary for Education & Manpower following the resumption of sovereignty (J.W.P. Wong 1997, p.17) indicated that Chinese and English Extensive Reading Schemes would be extended to all primary and secondary schools, and that, in line with earlier decisions, Putonghua would become a core subject in the curriculum starting from Primary 1 in 1998/99. It added (p.25) that a new Putonghua curriculum would be introduced at Secondary 1 and Secondary 4 in 1998/99, but at the same time that intensive English-language programmes would be introduced for sixth form students in both Chinese- and English-medium schools to prepare them better for tertiary studies. The official goal was that Hong Kong citizens should be biliterate (in English and Chinese) and trilingual (in English, Cantonese and Putonghua).

This measure was followed by a statement by the government's Education Department that the majority of public secondary schools would be required to use Chinese as the medium of instruction for all academic subjects (except English and English Literature) from their 1998/99 Secondary 1 intake, progressing each year to a higher level of secondary education (Hong Kong, Education Department 1997). Following stringent screening, only 114 public secondary schools – about one quarter – were permitted to use English as the medium of instruction for their 1998/99 and future Secondary 1 intakes. The government claimed that the language policy was introduced for educational reasons, but it was widely perceived as being primarily driven by political motives (Lai & Byram 2003, p.315).

Further intervention took the form of benchmark requirements on language standards. This measure arose from Education Commission Report No.6 (Education Commission 1995, pp.48-51), which had recognised the need to enhance the proficiency of both Chinese (including Putonghua) and English in order to maintain and further Hong Kong's position as "Asia's world city". The government required that from 2004 all new English and Putonghua teachers should pass the main components of a Language Proficiency Assessment for Teachers (LPAT) prior to assuming teaching duties. Serving English and Putonghua teachers in primary and secondary schools were required to fulfil the language proficiency requirement before the end of the 2005/06 (Hong Kong, Education Department 2000).

This initiative had far-reaching consequences. Many language teachers opposed the test, considering it a violation of their professional autonomy and personal integrity; and non-language teachers feared that the government might impose similar tests on their subjects. The Professional Teachers Union (PTU) initiated protests and boycotts.

Although the government finally allowed alternative assessments in lieu of the benchmark test, teachers felt that the requirements consumed unreasonable time and effort (Koo et al. 2003). Tensions were heightened when many candidates failed the test; and in 2003 only 5,000 of the 15,000 serving English teachers and 1,900 of the 5,600 serving Putonghua teachers had attained or partially attained the Language Proficiency Requirement (Hong Kong, Education & Manpower Bureau 2003d).

A second initiative which arose from Education Commission Report No.6 was the Native English-speaking Teacher (NET) scheme, which was launched in 1998/99. This initiative echoed an Expatriate English Teachers Scheme (EETS) which had been launched in 1987 and administered by the British Council. That scheme had not worked well, and had been widely viewed as rather colonial in orientation (Boyle 1997). Given this criticism, the introduction of a similar scheme in the postcolonial period showed more continuity in policies than might have been expected.

NET teachers were required to contribute to professional development and curriculum innovations in English language by working in collaboration with local counterparts (Walker 2001). The scheme commenced at the secondary level, and in 2001 was extended to primary schools. Under the primary scheme, each NET served two schools and in each school worked in collaboration with an experienced local School English Teacher (SET). The SETs were expected to act as bridges between the NETs and the school management teams, and to facilitate institutionalisation of innovative and effective teaching methods and curriculum resources. However, while the scheme contributed much to the professional development of English teachers and English standards, it was criticised as short-sighted and extravagant when compared with options that would have directly improved the standards of local English teachers and students (Sweeting 2002).

A further result of this ongoing concern was an “action plan to raise language standards” proposed by the Standing Committee on Language Education and Research (SCOLAR), which had been created in 1996 (SCOLAR 2003). The document supported efforts to benchmark language-teachers’ competence, and recommended (p.80) that all language teachers joining the profession from 2004/05 should hold at least a Bachelor of Education degree majoring in the relevant language, or both a first degree and a Postgraduate Diploma in Education majoring in the relevant language. The document noted (p.36) that under current policy schools could use either Putonghua or Cantonese to teach Chinese language, but endorsed the view of the Curriculum Development Council that the long-term goal should be to use Putonghua for this purpose. Already by 2003/04, 45 primary schools and 40 secondary schools were using Putonghua to teach Chinese language (Tse 2003).

To support this goal, the government had provided training for 2,800 Putonghua teachers between 1997 and 2000, and 400 teachers completed summer immersion programmes in mainland China between 2000 and 2002 with support from the government’s Language Fund. In 2003 the government extended the programme for five more years, giving priority to Chinese-language teachers who did not teach in Putonghua. This support was given to local Hong Kong teachers, even though many thousands of fully-qualified teachers could have been available from mainland China who, had they been allowed to come, would have accepted considerably lower salaries. Protection of the Hong Kong teaching force was another mechanism for retaining

identity within the postcolonial framework. Nevertheless, the protection was not absolute. The SCOLAR report indicated (2003, p.37) that:

Before there are enough local Chinese Language teachers with sufficient proficiency in Putonghua, some schools have expressed the desire to engage teachers of Chinese Language from the mainland ... to help them teach the subject in Putonghua. We fully support such initiative during the transitional period, provided that the teachers to be engaged hold qualifications equivalent to a local degree and recognised teacher training both in Chinese Language.

Market forces and the new political climate also brought further change in the balance between Cantonese and Putonghua as media of instruction across the curriculum. Cantonese remained the dominant dialect, which may be interpreted as a form of insistence on Hong Kong's identity within the framework of 'one country, two systems'. In part for similar reasons, Hong Kong retained the traditional Chinese characters even though the simplified versions could be written more rapidly. However, in 2003 six primary schools in the government and aided sectors were using Putonghua as the medium for teaching across all subjects (except English) compared with just one in 1997, plus four private primary schools compared with one in 1997. At the secondary level, the first school to teach fully in Putonghua was opened in 2002/03; and a further four schools used Putonghua for some subjects in addition to Chinese Language, Chinese Literature and Chinese History. This was a very small proportion of the total, but was a significant shift.

Nevertheless, the government insistence on the majority of secondary schools using Chinese as the medium was softened by other developments. First, schools were permitted to switch to English as the medium of instruction in Secondary 4 or above on condition that the schools could recruit teachers with sufficient language competence, that students were prepared to study in English, and there were adequate school-based resources to assist the transition. Many schools did indeed make the switch at this point (Hong Kong Association Secondary School Principals 2001), and some actively publicised the switch in order to improve student intakes in the lower forms. Second, a growing number of schools gained exemption by joining the Direct Subsidy Scheme, which enabled them to move out of the aided sector and thus beyond the reach of the requirement that they teach in Chinese. By 2003/04, 43 secondary and 10 primary schools were in the scheme (Hong Kong, Education & Manpower Bureau 2003b), though not all had joined the scheme through the same route and with the same motivation.

In higher education, shifts were generally away from Chinese as the medium of instruction rather than towards it. As noted by Yung in this book, universities were encouraged to aspire to international status, and to do this through English. This occurred even in the Chinese University of Hong Kong. As described by Yeung (2003, p.14):

The University's values have somehow changed. It now talks about internationalization, and selects students with a different set of criteria. In the past CU [Chinese University] students were proud of their mastery of the Chinese language, now with globalization being the catch word of the day, English prevails in importance.



At the Hong Kong Institute of Education, most courses were still taught in Cantonese but some were in English and a few were in Putonghua. To enhance language competence, in 2002/03 all students in the four-year BEd programmes were required to complete at least 25 per cent of their courses through English.

## Language and Education in Macao

### *The Main Colonial Period*

In Macao, Portuguese was for centuries used as the sole official language for all administrative, legislative and judicial purposes, and was also the main language for European-style education. For the initial centuries, such education was provided by missionaries under an agreement between church and state known as the *Padroado* (Simões 2003, p.258). The first European-style institution in Macao was the *Escola de Lêr e Escrever* [School of Reading and Writing], which was established in 1572 by the Jesuits and in 1594 became St. Paul's University College. The college was largely monastic, and courses were taught in Portuguese and Latin. Hui and Poon in this book note that the Jesuits were expelled from Macao in 1762 and that the closure of St. Paul's University College soon followed. However, responsibility for the formal education of both Portuguese Catholics and Asian converts was kept exclusively in religious hands. Simões (2003, p.260) explains that this could partly be explained by the *Padroado* missionary project, but also by the fact that even in Portugal education was mostly a matter for the Church. Within the Chinese community, education was provided by private schools following the dominant models of the rest of China. The government only began to play a direct role in education at the end of the 19<sup>th</sup> century.

Although Portuguese and Chinese were the main media of instruction for the respective communities, the second half of the 19<sup>th</sup> century also brought a demand for English. This chiefly resulted from the existence of employment opportunities in Hong Kong. Simões (2003, p.265) highlighted the particular importance of these opportunities to Macanese families, i.e. people of mixed Portuguese and Chinese race. He stated that by the end of the century:

not only had emigration [to Hong Kong] led to a marked decrease in the population of Macao, but Macao's financial activity was for all intents and purposes regulated by the British colony – especially by the dependence of many Macanese families upon the remittances sent by family members who had emigrated.

The Commercial Institute established in Macao in 1899 was particularly notable as a school which taught not only Portuguese language, Portuguese history, mathematics, geography, and natural sciences but also Chinese and English, together with other subjects deemed useful to the working environments of both Hong Kong and Shanghai (Teixeira 1982, pp.89-91). However, during the next few decades Macao found itself in competition with locally-educated Chinese in these two cities, and migration from Macao diminished.

At the beginning of the 20<sup>th</sup> century, due to the influx of migrants to Macao from the mainland and the increasing demand for education, the government established the Luso-Chinese school system to educate Chinese students through both Portuguese and

Chinese. However, enrolments in Luso-Chinese schools were modest even though no fees were demanded (Pires 1991, p.18). Due to language difficulties and cultural differences, most parents preferred to send their children to private Chinese schools. In 1919/20, for example, 125 schools existed among which 17 were operated by the government and municipal authorities, eight were run by missionaries, and 100 were private (Cónim & Teixeira 1999, p.161). Among the government and municipal schools, four operated in Portuguese, three operated in Chinese, and nine operated in both Portuguese and Chinese. By this time the Commercial Institute had been taken over by the government. It operated in Portuguese and English, though had only 38 pupils. Among the missionary schools, three operated in Portuguese, one operated in Chinese, and four operated in both Portuguese and Chinese. By enrolment, 18.6 per cent of pupils studied in Portuguese, 63.6 per cent in Chinese, 17.1 per cent in Portuguese and Chinese, and 0.7 per cent in Portuguese and English.

To extend its influence, the government initiated various schemes during the coming decades to promote the status of Portuguese (S.P. Lau 1995; Feng & Lai 1999). These included subsidies to missionary schools for the teaching of Portuguese; and applicants who could speak Portuguese were given priority when seeking government jobs. These measures were not always successful and sustained, and as total enrolments grew the proportion of pupils studying in Portuguese declined. Thus by 1938/39, for example, 5.7 per cent of pupils were studying in Portuguese, 82.5 per cent in Chinese, 9.1 per cent in Portuguese and Chinese, and 2.7 per cent in Chinese and English (Cónim & Teixeira 1999, p.166). Nevertheless, renewed pushes were made periodically. For example, a 1960 decree required all newly-recruited civil servants to be able to read and speak Portuguese, while those who had proficiency in Portuguese below Primary 3 level were barred from promotion. In the same vein, a 1972 decree mandated that candidates seeking representation in the City Council had to be able to read and write Portuguese. In essence, Portuguese was a tool to maintain the social stratification in colonial Macao. The majority of schools were operated privately and used Chinese as their media of instruction, but their graduates were then excluded from government posts.

### *The Late Colonial Period*

The 1987 Sino-Portuguese Joint Declaration set the timetable for the resumption of Chinese administration in 1999, and was the stimulus for many reforms. Chinese was made an official language in 1987, i.e. 13 years after the parallel move in Hong Kong.

In some aspects, the balance of languages in Macao schools at that period resembled that in earlier decades, though the proportion studying in English had increased further. In 1988/89, 84.1 per cent of Macao primary school pupils studied in Chinese, 9.2 per cent studied in English, 4.8 per cent studied in Portuguese, and 1.9 per cent studied in both Chinese and Portuguese (Macao, *Direcção dos Serviços de Estatística e Censos* 1990, p.89). The proportion studying in English was even higher than in Hong Kong, where 7.1 per cent of pupils in 1988/89 were studying in English in local-system primary schools and 0.8 per cent were studying in English Schools Foundation (ESF) institutions (Hong Kong, Education Department 1990, p.39). A further 0.9 per cent of pupils were studying in international schools, but even if it is assumed that most of these were studying in English, at the primary school level the total proportion in Hong Kong was below that of Macao. However, patterns were very different at the secondary level where, as noted, the vast majority of Hong Kong

secondary schools taught in English.

In Macao, the tertiary sector was at that time also dominated by English. As noted by Hui and Poon in this book, the sector consisted of only one institution, the University of East Asia (UEA) which had been founded in 1981 as a private English-medium institution. The UEA did teach some courses in Chinese, but at the time of the 1987 Sino-Portuguese Joint Declaration it did not teach any courses in Portuguese.

Because the local tertiary sector was limited, many students went outside the territory for further studies. As noted in Ma's chapter in this book, during the 1980s Taiwan was the strongest destination but during the 1990s was overshadowed by mainland China. Other students went to Portugal and to English-speaking countries such as Australia, Canada and the UK. The destination for external students was strongly shaped by the medium of instruction through which they had studied in secondary education.

Although the Joint Declaration provided an impetus for reform of the education system to prepare the territory for the handover, ironically it also provided an impetus for increased emphasis on Portuguese. Portugal by that time had no other colonies and so was able to give stronger attention to Macao. It also realised that Macao was in a part of the world which was economically vigorous, and the authorities realised that the remaining years of Portuguese administration were their last strong chance to gain a firm grounding for their culture and language. As recounted in the chapter by Hui and Poon, the 1988 government purchase of the main campus of the UEA provided the framework for reform of the university to fit the dominant models in Portugal and for greatly increased emphasis on Portuguese-medium courses. This shift gathered momentum after 1991, when the institution was renamed the University of Macau (UM).

Further Portuguese connections emerged during the 1990s from the establishment of other institutions of higher education:

- The Macau Polytechnic Institute (MPI) was founded in 1991 on the model for such institutions in Portugal. Some courses were taught in English or Chinese, but others were taught in Portuguese.
- The Asia International Open University (AIOU) was established in 1992 and formed a joint venture with the Universidade Aberta [Open University] of Portugal. Most AIOU courses were taught in English and Chinese, though some were taught in Portuguese.
- The Instituto de Formação Turística [Institute for Tourism Studies] (IFT) was established in 1995, and particularly focused on Portuguese culture in the hospitality sector.
- The Instituto Inter-Universitário de Macau [Inter-University Institute of Macau] (IIUM) was established in 1996 as a joint initiative of the Universidade Católica Portuguesa [Catholic University of Portugal] and the Diocese of Macau, and saw itself as a bridge for Chinese, Portuguese and Latin cultural interflow.

At an early stage, both the UM and the MPI joined the Associação das Universidades de Língua Portuguesa [Association of Portuguese-Language Universities] (AULP), which had been founded in 1986 and which provided links with counterpart institutions in Brazil and Portugal as well as in less powerful Portuguese-speaking countries. Subsequently, the IFT and IIUM also joined the AULP.

In addition, the government made efforts to increase the place of Portuguese in the school system. Lo's chapter in this book recounts the attempt in 1994 to make the teaching of Portuguese compulsory in all schools, and to make grants conditional on this requirement. The action angered both the Catholic Church and the left-wing Macau Chinese Education Association (MCEA) which, though divergent in their educational ideologies, worked together to oppose the move. Finally the government backed down, but official schools were still required to teach Portuguese.

This focus on Portuguese in some respects drew momentum from the Basic Law (China 1993), for which Hong Kong's Basic Law had been a model. When Hong Kong's Basic Law was drafted, the fact that English would remain an official language for at least 50 years after the resumption of Chinese sovereignty was uncontroversial because of the international nature of that language. When Macao's Basic Law was drafted, Hong Kong's clause about English became Macao's clause about Portuguese. This occurred even though Portuguese is more obviously a colonial language and less obviously an international language. Comparing Macao's political transition with that of other former colonies such as Angola, Cape Verde and Mozambique, it is ironic that the colony which was reintegrated with its motherland was the one in which the role of the Portuguese language was officially preserved for 50 years after the transition. It seems inconceivable that in the other territories postcolonial arrangements could only have been established with a clause requiring the colonial language to be preserved in the same way.

Alongside this set of developments, as in Hong Kong, was growing interest in Putonghua. Some institutions increased their focus on Putonghua of their own volition, and others responded to government encouragement to do so. Berlie (1999, p.74) remarked that the role of Putonghua was stronger in Macao than in Hong Kong since a larger proportion of the population, including many teachers, were recent migrants from mainland China. Longstanding Macao citizens also made efforts to learn Putonghua. In 1997/98, enrolment in Chinese language programmes at the Macau Polytechnic Institute numbered 2,600, while Putonghua enrolment in courses run by the Department of Education & Youth was approximately 500. In the continuing-education programmes operated by the Department of the Civil Service & Administration, enrolments in Putonghua courses in 1997/98 totalled 2,243 (Macao, Direcção dos Serviços de Educação e Juventude 1997b). Instructively, however, the enrolment in Portuguese courses, at 2,142, was not much lower. This reflected the continuing government attention to that language.

### *The Postcolonial Period*

The government's language policy after reintegration paralleled that in Hong Kong, but with the added element of Portuguese. Thus, the policy was that citizens should be trilliterate (i.e. written Chinese, Portuguese and English) and quadrilingual (i.e. spoken Cantonese, Putonghua, Portuguese and English). However, a significant number of Portuguese and Macanese families had left the territory in 1999, and in practice Portuguese declined in significance while English and Putonghua increased. This evolving emphasis was reflected in the school system. In 2002/03, 92.5 per cent of pupils were studying in Chinese, while 6.5 per cent were studying in English and just 1.0 per cent were studying in Portuguese. Government websites still had both Portuguese and Chinese sections, though an increasing number also had English sections (albeit

commonly with less information). The government also produced some publications in English as well as Portuguese and Chinese.

At the tertiary level, moreover, some further important shifts had occurred. The wave of Portuguese during the 1990s had to some extent been replaced by a wave of Putonghua. Among the significant new institutions was the Macao University of Science & Technology (MUST), which had been established in 2000. Many of its teachers and administrators were recruited from mainland China and operated entirely in Putonghua. However, English was emphasised in the Faculty of Information Technology and the Faculty of Management & Administration (Drago 2003, p.77).

Nevertheless, Portuguese had not been abandoned. The government continued to produce many publications in Portuguese, and in 2003 Macao hosted the 13<sup>th</sup> meeting of the Associação das Universidades de Língua Portuguesa (Lopes 2003). The territory had previously hosted the 8<sup>th</sup> meeting, but that had been in 1998, before the resumption of Chinese administration. The postcolonial event was therefore particularly significant. Moreover, leaders in Beijing also recognised the value of links to the Portuguese-speaking world that could be gained through Macao. Immediately after the AULP event, Macao hosted an inaugural Forum for Economic and Trade Co-operation between China and Portuguese-Speaking Countries, with representatives from Portugal, Brazil, Cape Verde, Guinea-Bissau, Angola, Mozambique and East Timor (Bruning 2003). China's Vice-Premier, Wu Yi, indicated at the event that trade between China and the Portuguese-speaking world was expected to double within five to seven years, and that Macao would host forums along the same lines every three years. A senior Macao official was reported to have remarked (Bruning 2003, p.1):

Even though this forum is not a political event, the fact that it will be held here every three years will dramatically raise Macau's political importance in international relations. Our leaders in Beijing have shown great vision to take advantage of Macau's Portuguese colonial past to strengthen the nation's ties with the Portuguese-speaking world.

Of course such matters should not be over-emphasised, and China's trade with other parts of the world will remain considerably more important than that with the Portuguese-speaking world. However, the developments showed a further way in which Macao was different from Hong Kong, and in which even the Beijing leadership found ways to make use of the Portuguese colonial legacy.

### **International Schools in Hong Kong and Macao**

Concerning Hong Kong, the above discussion mainly focuses on the mainstream education system for the Chinese majority. The institutions of the English Schools Foundation (ESF) were mentioned above, and deserve some further attention. Macao does not have counterpart schools of this type, but does have other international schools.

The ESF was created in 1967 to operate schools on the system of England and Wales for the children of colonial civil servants and other expatriates. The ESF schools received the same financial assistance as other aided schools, but were permitted to charge fees in order to pay for superior facilities and higher salaries (Bray & Ieong 1996; Yamato & Bray 2002). At the outset, the ESF had only two schools, but three more were

opened during the next few years and in 1979 the government handed over to the ESF six schools which it was itself operating on the curriculum of England and Wales. The ESF continued to grow, and in 2004 embraced nine primary schools, five secondary schools and one special-needs school.

The Hong Kong government was perhaps wise to create the ESF in 1967, and to transfer the government schools in 1979, since these moves allowed the authorities to concentrate on the needs of the Chinese majority. The Macao government did not make parallel moves, with the result that even up to 1999 it was still directly providing education on the Portuguese curriculum for the children of Portuguese civil servants and others. Only in 1999, at the time of the resumption of Chinese administration, did the Macao government transfer its official Portuguese school to a private foundation.

At the time of the creation of the ESF, a few other institutions also served non-local populations. For example a German-Swiss school had been established in 1963, a French school in 1964, a Japanese school in 1966, and the Hong Kong International School with a US curriculum in 1966 (Yamato 2003, pp.102-103). In the years that followed, other schools were opened to serve the Australian, Indonesian, Korean, Singaporean and other foreign communities. Some of these schools served local Hong Kong families in addition to the nationals of the foreign systems to which the institutions were oriented. The German-Swiss and the French school opened English-medium streams to facilitate this. Other institutions, such as the Delia School of Canada, Concordia International School, and the Chinese International School were opened specifically to serve local and non-local families together. By the 1990s, the ESF and other foreign-national schools were commonly grouped with other non-local institutions under the general category of international schools. At the time of Hong Kong's 1997 political transition, the international sector had 60 institutions, comprising about 4 per cent of the total number. The government welcomed the operation of these schools because they helped to make Hong Kong an international city. In 2003 the Permanent Secretary for Education & Manpower (Law 2003) stated that:

In addition to a "mother tongue" stream, some international schools also operate a section that uses English as the medium of instruction. Where capacity permits, international schools are also open to local children. They have become a welcome part of our local education rubric. The cynics have interpreted this as a lack of faith in the local system. I see this as an encouraging sign that parents recognize the increasing importance of international education, a vision shared by the government.

Alongside these institutions, even at the primary level some further English-medium schools were operated in the government and aided sector. Sir Ellis Kadoorie School was founded in 1890 and has a long tradition of service to Indian, Pakistani, Filipino and other non-Chinese-speaking minority groups. A 2003 official publication entitled 'Education Facilities for Non-Chinese Speaking Children' called attention not only to that school but also to Li Cheng Uk Government Primary School which offered Hindi, Urdu and Chinese (Hong Kong, Education & Manpower Bureau 2003c, p.1). For the aided sector, the document indicated that in addition to the ESF four primary schools used English as the medium of instruction in some classes. These schools could be described as international in their student bodies, but primarily local in the orientations of their curricula.

Patterns in Macao have been rather different. As indicated, the Portuguese schools, both government and private, catered for families desiring a curriculum based on that in Portugal. The first school that could describe itself as international was the School of the Nations, established by the Baha'i community in 1988. It remained a small institution, with only 186 pupils in 2003/04. According to its website, approximately 70 per cent of its pupils were from Macau while the remainder were from over 30 nationalities. This school was joined in 2002 by the International School of Macao, which operated on a Canadian curriculum. In 2003/04, it had 180 students including kindergarten grades; and its website claimed that the student body included 24 nationalities.

These institutions are partly given attention in this chapter to show the diversity of provision, including that for minority groups. In Hong Kong, the international schools sector played a further important role in the context of the government's 1998 push to make Chinese the dominant medium of instruction in mainstream secondary schools. Some of the elite families who did not favour this policy transferred their children to fee-paying places in international schools. Along with the Direct Subsidy Scheme schools, the international schools therefore acted as a sort of safety valve for the local system, allowing the government to proceed with its plans for the majority of citizens. A parallel move had not been necessary in Macao because the government had not taken a comparably aggressive stance on medium of instruction.

## **Conclusions**

This chapter commenced with the broad literature on colonialism and postcolonialism. The discussion shows some similarities and differences between the pair of territories in the domain of language and education, and also some paradoxes which will be highlighted in this concluding section.

During the main colonial era, albeit with different phases and shifting priorities, the British placed considerable emphasis on English in Hong Kong while the Portuguese placed parallel emphasis on their language in Macao. In both colonies, as in their counterparts elsewhere in the world, language was a major instrument for social stratification and control. However, British colonial policies in some respects differed from Portuguese ones. The British were more interventionist, whereas the Portuguese until the end of the 19<sup>th</sup> century left education to the churches and private sector and even for most of the 20<sup>th</sup> century played only a minimalist role. Both governments did assist Chinese-medium education as well as education in the colonial language, but the Hong Kong government did so much more actively.

One of the paradoxes is that during the late colonial period the Hong Kong government desired to increase the proportion of schooling in Chinese rather than English, particularly at the secondary level, but felt that it lacked the legitimacy and ability to force families to follow this route. The postcolonial government did force the change, but encountered strong opposition. The colonial government in Macao, by contrast, used its sunset years to expand the place of Portuguese in the education system. It did this despite centuries of neglect during the main colonial period, and despite the fact that Portuguese was of practically no use as a regional language and of limited use internationally. This contrast helps to show that the roles of government may differ

significantly, even in territories that otherwise have very similar cultural and economic circumstances. The different choices made by governments clearly have a major impact on the nature of colonial transitions.

Also part of the paradox in Macao is the fact that Portuguese as an official language was guaranteed for 50 years after the colonial transition despite the reunification of the territory with its Chinese-speaking motherland. This pattern resulted from the fact that although Macao had been colonised earlier than Hong Kong, it was decolonised slightly later and in the process followed the model set by Hong Kong. This model raised the status of Portuguese to a higher level than it would otherwise have had.

A further part of the paradox is that in Macao market forces encouraged a significant volume of education in Hong Kong's colonial language (English) than Macao's colonial language (Portuguese). This began in the 19th century, when Macanese families desired English in order to improve employment prospects in Hong Kong. Thus, even in that period of history Macao was heavily influenced by developments in Hong Kong; and although the influence of Hong Kong on Macao's education system diminished at the beginning of the 20<sup>th</sup> century, it subsequently increased again.

However, economic growth since the early 1990s has on the one hand allowed Macao to assert its identity and on the other hand integrated it with the global economy. Thus in more recent times the strong demand for English in Macao does not so much reflect the role of English as the colonial language in Hong Kong but as an international language of wide general use. Thus, Macao students learned English not so much to gain access to Hong Kong as to access information from many countries around the world via the printed word, the internet, films and other media. A similar remark had also become applicable to Hong Kong, where links with the UK had diminished but links with other parts of the world had expanded. These links were not only with English-speaking countries such as Australia, Canada and the USA, but also with businessmen and others who used English as a second language. Also, many students from both Hong Kong and Macao proceeded abroad for further studies. Students who wanted Chinese-medium education went particularly to Taiwan until the 1990s and then increasing numbers to mainland China. Their counterparts who desired English-medium education went particularly to Australia, the UK and the USA.

Such remarks do, however, raise the question whether English as an international language is part of a neocolonial force, as suggested by Phillipson (1992) and Pennycook (1998). Insofar as new forms of stratification and control arise, it may be argued that one form of colonialism has merely been replaced by another. As noted by Tikly (1999, pp.616-617), the conceptual literature on postcolonialism needs to be dovetailed with that on globalisation for full understanding of the action of multiple forces in the shaping of educational processes. In Hong Kong, the pressures on universities to use English were to a large extent linked to the wider pressures of internationalisation and globalisation. These pressures were also evident in Macao, though interestingly they were more strongly mixed with forces within the national framework. Thus the Macao University of Science & Technology (MUST), for example, conducted much of its business in Putonghua since a large number of its administrators, teachers and even students were recruited from mainland China. MUST had found for itself a special niche at a confluence of local, national and international forces. Hong Kong universities also attracted students and some teachers (but very few administrators) from mainland China, but operated at a higher end of the market and did



so in English more than Putonghua.

At another level, the advent of Putonghua was seen by some people as a neocolonial force which also created forms of stratification. Enthusiasts for mother-tongue education had to face the fact that Cantonese had increasingly to compete with Putonghua; and the Hong Kong government set the official goal of society being biliterate and trilingual. This was widely considered a major challenge; and Lai and Byram, for example (2003, p.326), observed that the “inclusion of a Putonghua component into the controversial mother tongue education has made the local social situations of language difficult and complex”.

Yet if situations in Hong Kong were difficult and complex, they were even more difficult and complex in Macao. That territory had all the ingredients of Hong Kong, plus the additional ingredients of Portuguese. The maintenance of that language imposed a high cost on the government, but it was considered essential to fulfil the requirements of the Basic Law. The language did also have some usefulness in forming part of Macao’s distinctive identity and in promoting connections with Portuguese-speaking countries. Thus, despite the remarks above about the limited usefulness of Portuguese in the international arena, Macao’s links with the Portuguese-speaking world were being actively maintained and were even seen in Beijing as having usefulness. This was part of the broader framework within which Macao found itself operating, and again shows the multiple dimensions in which policy makers endeavoured to secure an advantage from historical legacies.

Another paradox is that although Hong Kong’s postcolonial government strongly emphasised Chinese, it also strongly emphasised English. Further, among the measures taken by the postcolonial government was the Native-speaking English Teacher (NET) scheme, which resembled the Expatriate English Teachers Scheme (EETS) that had been launched by the predecessor government in 1987 and that had been widely considered very colonial in tone. The fact that the postcolonial government favoured such a scheme provides perhaps unexpected evidence of continuities across eras.

Possibly also unexpected was the extent to which the Hong Kong government supported the enrolment of Hong Kong students in English-medium international schools, even during an era in which the authorities were stressing Chinese-medium education for the majority of Hong Kong citizens. This action can perhaps be interpreted in terms of pragmatic achievement of policies. The international schools provided a safety valve for the elite, and reduced opposition to the measures designed for the mainstream education system. Critics might feel that the arrangement also operated as a behind-the-scenes mechanism for maintenance of social stratification despite appearances to the contrary.

In summary, analysis of patterns of language use in education shows complex forces and various paradoxical outcomes. The policies of the colonial governments differed in significant ways in Hong Kong and Macau, and actions at the lower levels of education systems did not always match those at higher levels. Both territories in some respects emphasised Chinese, and particularly Putonghua, in the postcolonial era, but this was not such an active rejection of colonial patterns as had been the case in such countries as Tanzania, Pakistan, Indonesia and Malaysia. Nor was the colonial language needed as a unifying factor as in Kyrgyzstan and Papua New Guinea. Rather, both Hong Kong and Macao had distinctive patterns arising from their particular circumstances. Both territories had to grapple with the respective roles of Cantonese and Putonghua;

and both had to find appropriate places for English, with Macao having the added complexity of Portuguese.

Note: Parts of this chapter draw on the article by Mark Bray & Ramsey Koo (2004): 'Post-colonial Patterns and Paradoxes: Language and Education in Hong Kong and Macao'. *Comparative Education*, Vol.40, No.2, pp.215-239.