

“Liberal Studies in Hong Kong 1992-2014: A critical history”

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Abstract

This thesis investigates the history of two Liberal Studies curricula in Hong Kong: Advanced Supplementary Level Liberal Studies (ASL LS) and New Senior Secondary Liberal Studies (NSS LS), which were introduced under two successive academic structures. The former follows the English Britain academic structure, with five-year junior and senior secondary, two further secondary years for matriculation, and a three-year undergraduate higher education. The latter resembles the Chinese academic structure with three years' junior secondary, three years' senior secondary and four year of undergraduate higher education. ASL LS formed part of the matriculation education curriculum and lasted for two years under the old academic structure; NSS LS is a component of a three-year senior secondary education under the new academic structure. The shift of academic structures in Hong Kong took place between 2009 and 2012, during which transition period both academic structures existed in parallel.

This research has two main purposes. The first is to examine the history of the two Liberal Studies curricula. The second is to find out the key factors shaping the two curricula. The results and findings are mainly based mainly on documentary analysis supplemented by interviews with men and women who played significant

parts in shaping the Liberal Studies curriculum.

This historical research identifies three key overlapping stages in the development of Liberal Studies. The first stage relates to the formation and implementation of the ASL LS from 1992 to 2012. The second stage, beginning in September 2001, covers the consultation over and implementation (up to August 2014) of NSS LS. The third and comparatively short stage covers September to December 2014. This was initiated by the 79 day ‘Occupy Central’ and the ‘Umbrella’ movements in support of universal suffrage for the Legislative Council Election in 2016 and Chief Executive Election in 2017.

While the predominant view in the academic literature locates the origins of Liberal Studies in the Sino-British Joint Declaration of 1984, Legislative Council records show that ideas about liberal studies began to emerge as early as 1978.

Factors shaping the Liberal Studies curriculum are also identified at *international*, *regional* and *local* levels. The Liberal Studies curricula is seen as resulting from the interplay of factors at all three levels, with local level factors played the decisive role.

Dedication

This thesis is dedicated to my father Cheng Chuen Sang (1937-2013) and my mother Ha Kwai Hung who have been taking care me since I born. As such, I have room to pursue the doctoral dream

Acknowledgement

I recited from the speech of Professor John Morgan, the former program director of Doctor of Education (Lifelong Education), ‘Doctoral studies is a long-term commitment. Throughout the study period, you may encounter lots of events which may impede your studies.’ It is my greatest honour to overcome the obstacles and graduate from the Doctor of Education (Lifelong Education) of the University of Nottingham.

First, I am grateful to have my supervisor Professor John Holford to comment and correct my draft papers. His advice is invaluable in contributing to my success. The supervisory team should have consisted of two experts. However, in most of my supervision period, John worked alone to supervise me. I must say million thanks to John.

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List of Abbreviations

AL	-	Advanced Level
ASL	-	Advanced Supplementary Level
ASL LS	-	Advanced Supplementary Level Liberal Studies
CDC	-	Curriculum Development Council
CUHK	-	Chinese University of Hong Kong
EDB	-	Education Bureau
EMB	-	Education and Manpower Bureau
HKDSE	-	Hong Kong Diploma of Secondary Examination
HKEA	-	Hong Kong Examinations Authority
HKEAA	-	Hong Kong Examinations and Assessment Authority
HKSAR	-	Hong Kong Special Administrative Region
HKU	-	University of Hong Kong
IES	-	Independent Enquiry Study
Legco	-	Legislative Council
MCE	-	Moral and Civic Education
MNE	-	Moral and National Education
NSS	-	New Senior Secondary
NSS LS	-	New Senior Secondary Liberal Studies
PRC	-	People's Republic of China
SBA	-	School-based Assessment
STS	-	Science/Technology/Society Movement

Note: Education Authorities in Hong Kong

(1) About Examination Organisation

The Hong Kong Examinations Authority (HKEA), formed in 1977, was responsible for organising public examinations in Hong Kong. It was renamed the Hong Kong Examinations and Assessment Authority (HKEAA) in 2002.

(http://www.hkeaa.edu.hk/en/about_hkeaa/milestones/ - accessed on 29 April 2016)

(2) About Government Organisations responsible for Education Issues

Various government organisations (Education Department, Education and Manpower Bureau (EMB), Education Bureau (EDB)) have overseen education issues in Hong Kong. The following timeline helps readers to understand the thesis as the terms may be encountered from time to time.

1983 Education issues were overseen by EMB and Education Department. The former was responsible for policy formulation and the latter was for policy implementation.

1997 Education and Manpower Branch was renamed Education and Manpower Bureau. The overall functions did not change.

- 2003 Under the principal official accountability system, EMB merged with Education Department. EMB was retained. It carried both policy formulation and implementation functions.
- 2007 EMB was renamed as EDB. The bureau title has continued to be used up to now.

Chapter One Introduction

This chapter introduces my professional background in education and my connection to Liberal Studies. This is intended to help the reader to understand why I took up research in the history of Liberal Studies and to illuminate its significance. The introduction also delimits the scope of the research, including the period studied and the levels of Liberal Studies curricula covered. The purposes of the study and research questions are then discussed. The chapter finishes with an explanation of the structure of the thesis.

1.1 My Professional Journey of Education

I have been a full time teacher in a field studies centre and secondary schools in Hong Kong for almost twenty years. I did my bachelor degree in Geography and my postgraduate certificate in Education with Geography as my major subject. I have taught Geography, a disciplinary subject, in secondary school and field studies centre. This might suggest that my connection with Liberal Studies has not been strong.

However, I have held two posts which brought me closer to Liberal Studies. From 2000 to 2007 I was the panel chairman of the junior form Integrated Humanities at

the school where I then worked. During the period, I had more chance to engage with curriculum integration, one of the key characteristics of Integrated Humanities and Liberal Studies. Moreover, during the period of public consultation of New Senior Secondary Liberal Studies (NSS LS) (2004-2005), I was invited by my school to prepare to take up the role of panel chairman of NSS LS; I therefore had the opportunity to involve myself in Liberal Studies developments by participating the seminars and professional training workshops. I left the secondary school to teach Geography fieldwork in a field studies centre in 2007. However, this was not the end of my relationship with Liberal Studies.

A university employed me as a part-time lecturer to observe, provide feedback and assess pre-service and in-service teachers of Liberal Studies. This gave me good opportunity to learn more about Liberal Studies by talking to teachers and I reflected on the meaning of Liberal Studies after each teaching practice. My postings as panel head of Integrated Humanities in secondary school and the part-time lecturer in universities largely explain my interest in researching Liberal Studies – a school-based and integrated subject (Leung, 2009b and 2010).

)

1.2 Significance of the study

This study is one of relatively few which have addressed the history of Liberal Studies in Hong Kong. This research aims at examining the history of the two Liberal Studies curricula and also finding out the key factors shaping the two curricula. As mentioned above, it is driven by interest from my working experience of Liberal Studies.

The socio-political environment provides an important backdrop for understanding the history of Liberal Studies in Hong Kong. Franklin's (1999) view illustrates that understanding the social-political environment and the underlying values and beliefs are fundamental to comprehending the history of a curriculum:

“Curriculum was not pre-given but rather a social construct. The curriculum, in other words, was consciously constructed by society to reflect its prevailing values and beliefs, particularly those things that it cherished and wished to pass on to succeeding generations.”

(Franklin, 1999:459)

This viewpoint are also shared by curriculum historians continue their search for more interesting and insightful ways of linking the development of the curriculum with its surrounding societal influences.

Sweeting (2007) observed that the histories of education in Hong Kong were full of mysteries: “when a period is relatively remote, as well as lengthy, mysteries are

inevitable,” (p.91); and myths “answers that depends on insufficiencies of the past” (p.94). There is an array of mysteries in Liberal Studies, including the choice of curriculum content (i.e. six modules) and the debate surrounding the role of Advanced Supplementary Level Liberal Studies (ASL LS) as core subject. So far, there are few publications documenting the history of Liberal Studies.

As time goes by, it may become difficult to trace the history of Liberal Studies, due to the loss of key curriculum players able to share the oral history about the subject. This is therefore an ideal time for me to gather the historical evidence and arguments surrounding the history of Liberal Studies with the help of key curriculum players and available documents.

This study also attempts to fulfil the three duties of any historian of education (Aldrich, 2003), a role that I have gradually become aware of having grown into. I feel that I have been engaging in the work of an education historian throughout my doctoral studies:

“The first is a duty to his [sic] own generation and the second to people in the past. The third is shared not only with other historians and social scientists but with all scholars and scientists. This is the duty to search after the truth to the utmost of his capacity, or of hers, recognizing that it may be impossible to avoid some degree of bias but doing all that can be done to avoid it.”
(Laslett, 1987:267)

Each moment in the historical past was once both a future and a present. In other words, understanding the past is key to understanding the present and even to projecting into the future.

The genesis of ASL LS can be traced back to the preparation for the transition of sovereignty from the United Kingdom to China.

“The emergence of ASL LS in 1989-1991 was due to the government’s response to the changing socio-political contexts in the post 1984 era arising from the preparation of the return of sovereignty from United Kingdom to China.”
(Morris and Chan, 1997a)

The Joint Declaration was signed between China and the United Kingdom in order to prepare the transfer of sovereignty of Hong Kong from the United Kingdom to China in 1984. Liberal Studies was perceived as a subject that would enable students to increase their understanding of Hong Kong and China. In other words, ASL LS was constructed on the socio-political environment of more than twenty years ago. As I shall show, present day NSS LS has substantially inherited the content and pedagogy of ASL LS, with modifications made to suit changes in society. In other words, Liberal Studies, like other subjects, has been formed in the socio-political environment of Hong Kong. The recent Umbrella Movement has most definitely changed the general situation of Hong Kong and will undoubtedly shape the curriculum in future.

As Wiersma and Jurs (2009) stated, “the contribution of historical research to policy making is consistent with its value to informed decision making about educational issues and problems” (p.256). A reflection of Liberal Studies’ historical past is pertinent to formulation of the Liberal Studies’ curriculum policy in the future.

1.3 Scope of the Research

The scope of the research divided along two principal axes – the time frame and the form level.

1.3.1 Time Frame

This study encompasses two Liberal Studies curricula: Advanced Supplementary Level Liberal Studies (ASL LS) from 1992 to 2012 and New Senior Secondary Liberal Studies (NSS LS) from 2009. The timeline shown in Figure 1.1 depicts the study periods diagrammatically.

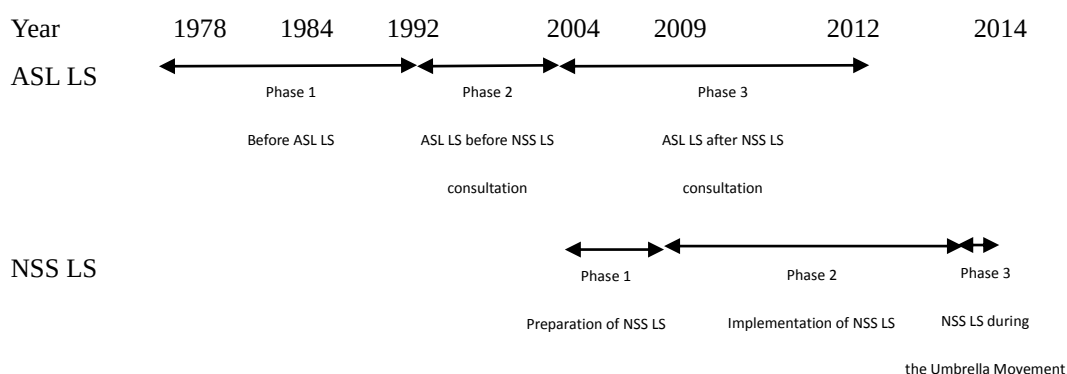


Figure 1.1 Timeline of ASL LS and NSS LS

ASL LS can be divided into three phases. Phase One, the period before 1992, was the preparation phase. Phases Two and Three (1992 to 2012) refer to the period when ASL LS was put into practice. However, Phases Two and Three were divided in 2004 when consultation about NSS LS rose high on the agenda.

NSS LS can also be matched into three phases. Phase One, from 2004 to 2009, was the preparation phase. Phases Two and Three (2009 to 2014) were the actual implementation phases of NSS LS. With the occurrence of the Umbrella Movement from September to December 2014, I believe a new page has been likely developing in Liberal Studies.

NSS Liberal Studies was founded because there was a gradual shift of academic structures in Hong Kong from a seven-year secondary school programme under the British education system to a six-year secondary school programme under the People Republic of China education system. The academic structures of subjects were reconfigured from '5, 2, 3' to '3, 3, 4'. These figures refer to the number of years of study in junior secondary, senior secondary and undergraduate higher education in Hong Kong respectively. There was a transitional period with the presence of both academic structures from 2009 to 2013.

There are two points to note concerning about the research time frame. Although the actual first offering of ASL LS was in 1992, the preparation and origin of ASL LS date back to the 1980s. As a result, some historical materials explored are pre-1992. Secondly, NSS LS is still being offered and a cut-off time is needed for this study. Taking into consideration the significant impacts of the Umbrella Movement on the NSS LS curriculum, this research adopts 31 December 2014 as the end point.

1.3.2 The Form Level

The term, ‘Liberal Studies’ has been widely used, especially after the announcement of a public consultation in 2004 on the possibility of making NSS LS compulsory (CDC and HKEAA, 2004). Some secondary schools also launched Liberal Studies at junior secondary level, secondary years one to three, to prepare students taking NSS LS as a compulsory subject in the public examination. This research does not include junior secondary level Liberal Studies because there is no official and common syllabus across schools to facilitate accurate comparison.

1.4 Purposes of the Study

The purposes of the study are two-fold and intertwined: to analyse the factors shaping the history of Liberal Studies at different stages and to divide the history of Liberal

Studies in Hong Kong into key stages according to their salient characteristics.

1.5 Research Questions

This thesis is historical research focusing on Liberal Studies. The following research questions and research sub-questions were designed to guide my study.

Research Question One: How did the history of Liberal Studies evolve from 1992 to 2014?

Since there are two Liberal Studies curricula, ASL LS and NSS LS, two sub-questions are further divided:

(a) How did the history of ASL LS evolve over time?

(b) How did the history of NSS LS evolve over time?

Research Question Two: What were the factors affecting the development of Liberal Studies from 1992 to 2014?

In order to make sense of the Liberal Studies curricula, I identified various stages from historical evidence provided mainly by documentary analysis but supplemented with oral history. The factors shaping the history of Liberal Studies can be divided into three levels: international level, regional level and local level. Various levels of factor are usually adopted to study curriculum development. The meaning of levels of factor is

elaborated in the literature review in Chapter three. In the light of the literature review and the empirical studies, I explore the factors shaping the history of Liberal Studies in Hong Kong.

1.6 Summary of the Argument

Two Liberal Studies curricula, ASL LS and NSS LS, emerged in Hong Kong. ASL LS was taught from 1992 to 2013 but it was not a popular choice in secondary schools. However, the consultations of compulsory NSS in 2004 stimulated the interest of secondary school principals on this subject. Therefore, three phases were identified in relation to ASL LS: the pre-1992 period, 1992 to 2004 and 2005 to 2013.

My research on NSS LS focuses on the period from 2004 to 2014, including the preparation stage, from 2004 to 2009 and the implementation of the programme from 2009 to August 2014. This research also examines both the perceived influence of the Umbrella Movement on NSS LS and how the Umbrella Movement impacted NSS LSS.

The findings illustrate the influences of the international, regional and the local levels factors in shaping Liberal Studies curricula. However, I conclude that the

local level factor played the most important role compared with the other levels.

1.7 Structure of the Thesis

This thesis comprises eight chapters to give a full picture of the history of Liberal Studies from 1992 to 2014.

Chapter one has introduced the thesis, explaining my personal professional journey in education, and the purposes, key research questions and sub-questions, and significance of the study.

Chapter two presents the literature related to this study. Chapter two clarifies the meanings of ‘Liberal Education’ and ‘Liberal Studies’, which set the scene for the terminology used in this thesis. As Hong Kong’s Liberal Studies curricula have their roots in civic education, a brief development of civic education in Hong Kong is illustrated. The models of integrated curriculum of Jacobs (1989), Drake (1993) and Fogarty (1991 and 2002); and the conceptual framework of the aims of education of Morris (1995) are reviewed.

Chapter three organises and summarises the meanings and conceptual framework

affecting the history of curricula generally. A framework of international level factors, regional level factors, and local level factors is presented and provides the major tool to evaluate the development of the history of Liberal Studies in subsequent chapters.

Chapter four presents the research methods, describing and justifying the chosen research methods of documentary analysis and oral history used in tackling the research question and sub-questions. In this study, documentary analysis is the main research method; it is supplemented with oral history.

Chapters five and six adopt a narrative enquiry approach to present and discuss the major findings and results. Three overlapping stages of Liberal Studies are identified in ASL LS and NSS LS respectively. Chapter five narrates the curriculum history of ASL LS, which covers the period from 1992 to 2012, the whole curriculum history of ASL LS. The preparation phase of ASL LS in the 1980s is also included in this chapter. Chapter six outlines the curriculum history of NSS LS from 2001 to 2014; this period includes the consultation and implementation of NSS LS and the future development of Liberal Studies in the wake of the Umbrella Movement.

Chapter seven examines the factors shaping the history of Liberal Studies in Hong Kong. Conclusions are drawn from the preceding two chapters showing how international level factors, regional level factors, and local level factors shaped the development of the history of Liberal Studies. However, the most pertinent factor is what was happening at the local level.

Chapter eight summarises the findings, highlights the significance of the study, evaluates its limitations, and makes suggestions for further research in this area.

Chapter Two

Literature Review (I) - Definitions of Key Terms

2.1 Introduction

This chapter is divided into four sections. The meanings of ‘Liberal Education’, ‘Liberal Arts Education’, and ‘General Education’ are differentiated, giving a general background to help the reader to understand the distinction between ‘General Education’ and ‘Liberal Studies’ in Hong Kong, which will be discussed in a later section of this chapter.

The scene of ‘General Education’ in the Chinese University of Hong Kong (CUHK) is then described. CUHK was the pioneer in advocating and developing General Education, which is believed to have impacts on the development of NSS LS. A brief review of the General Education in the CUHK may facilitate our understanding of Liberal Studies curricula.

Many also point out that Liberal Studies has its origin from civic education in early 1980s. The third section explores the meaning of civic education in which Liberal Studies played contributing role on during the study period.

The final section of the chapter presents two theoretical curriculum frameworks: the “Model of Aims of Education” (Morris, 1995) and the “Models of Curriculum Integration” (Drake, 1993, Jacobs, 1989 and Fogarty, 1991 and 2002), which are useful to describe and analyse the characteristics of curriculum change within Liberal Studies.

2.2 Meaning of ‘Liberal Education’, ‘Liberal Arts Education’, and ‘General Education’

The meanings of ‘Liberal Education’, ‘Liberal Arts Education’, and ‘General Education’ are unclear and often used interchangeably. Different education scholars have attempted to differentiate between them (Kimball, 1986; Miller, 1988). Others (Conrad, 1978; Levine, 1978) suggest that distinctions between the terms are futile. Experts such as Glyer and Weeks (1998: xiii) argue that there is little agreement about what Liberal Education should be. Moreover, theory and practice of Liberal Education are confused and contradictory. Hence, in this section, the argument for and against differentiating the terms Liberal Education, Liberal Arts Education and General Education are elucidated. I conclude in favour of differentiating between the terms.

2.2.1 Argument for Differentiating ‘Liberal Education’, ‘Liberal Arts Education’, and ‘General Education’

Kimball (1986) and Miller (1988) consider Liberal Education to be different from Liberal Arts Education and General Education. Although deriving originally from the Greek philosopher Aristotle, ‘Liberal Education’ has its origin in the European medieval concept of the *artes liberalis*, the seven liberal arts that were appropriate for a free man. The Latin ‘liber’ means ‘free’ in contrast to the *artes mechanicae*, which were pursued for economic purposes, and involved vocational and practical arts (Roche, 2010).

‘Liberal Education’ at that time included three basic arts focused on developing a facility with language: grammar (or language), rhetoric (or oratory), and dialectic (or logic), which were known as the *trivium*. On top of these were four advanced mathematical-physical arts: geometry, arithmetic, music, and astronomy, known as the *quadrivium* (Kimball, 1986). Despite its origins in the *trivium* and *quadrivium*, the purpose of Liberal Education has more recently been described as the, “education of free citizens with leisure to study” (ibid, 1986:14). In other words, the purpose of learning under Liberal Education is self-achieving – learning without a specific and extrinsic purpose.

The terms 'Liberal Arts Education' and 'General Education' have appeared in universities since the early 20th century. With the growing compartmentalisation of knowledge, the dominance of 'Liberal Education' was gradually supplanted by new disciplinary and professional subjects such as law and medicine. (Leung, 2008). In the context of increasing specialisation, Liberal Arts Education and General Education have emerged to promote holistic development, attempting to fill the resulting 'discipline vacuum'. The purpose of 'Liberal Arts Education' and 'General Education' is to complement disciplinary learning in university; and it is primarily for this reason that they are part of formal education in present-day universities.

2.2.2 Arguments against Differentiating 'Liberal Education', 'Liberal Arts Education' and 'General Education'

Although it is possible to draw some clear distinctions between 'Liberal Education', 'Liberal Arts Education', and 'General Education', the three terms are not mutually exclusive; rather, they are complementary concepts (Association of American Colleges and Universities, 1998). The present aims of General Education and Liberal Arts Education include supplementing specialisation of major subjects, broadening horizons, fostering generic skills and citizenship education: these, to a certain extent, overlap with the aims of Liberal Education (ibid). Moreover, every university develops its own General Education and Liberal Arts Education

programmes within its own context. It is difficult, therefore, to define ‘General Education’ or ‘Liberal Arts Education’ from the perspectives of content coherence (Boning, 2007) or assessing general education outcomes (Aloi et al., 2003).

2.2.3 Definitions Used in this Thesis

The terms, ‘Liberal Education’, ‘Liberal Arts Education’, and ‘General Education’ do not have rigid and consistent definitions. However, in this thesis, I differentiate ‘Liberal Education’, ‘Liberal Arts Education’, and ‘General Education’ because, as more information is revealed, subtle concepts may be lost if these independent concepts are treated as if they were the same. Therefore, I offer the following working definition of the key terms:

- **Liberal Education** – seven liberal arts studied in the European medieval period.
- **Liberal Arts Education and General Education** – a university curriculum that leads to whole person development. This terminology is not confined to ‘Liberal Arts Education’ and ‘General Education’; other universities use different terms according to their own needs. In order to simplify the

discussion in this thesis, the term, ‘General Education’ is adopted for both ‘Liberal Arts Education’ and ‘General Education’.

- **Liberal Studies**

‘Liberal Studies’ is tailor-made for the ASL or NSS students, whereas ‘General Education’ is designed in the specific context and target of a particular university. The second difference between ‘Liberal Studies’ and ‘General Education’ is that the former contains an official syllabus while the latter does not. Last but not the least; as I use the term, ‘Liberal Studies’ refers to what is offered in schools in Hong Kong, while ‘General Education’ is delivered in universities worldwide (including Hong Kong).

In the following sections, the scene of General Education of CUHK is presented.

The meaning of “Liberal Studies” is then defined in detail.

2.3 General Education in the Chinese University of Hong Kong

The origins and the pace of development of ‘General Education’ have differed between the universities in Hong Kong. Amongst the University Grants Committee (UGC) funded universities, CUHK was offering General Education programmes for

a long period before ASL LS arrived on the scene, while other universities began to develop the ‘General Education’ after the 2004 consultation on NSS LS. The relatively long history of General Education at CUHK may have potential influence on school-based Liberal Studies (this will be elaborated in Chapter six), and I shall therefore briefly describe General Education in CUHK in this section.

CUHK has had a strong belief in General Education as a key part of a holistic university education.

“CUHK believes that a world-class university education has to include training in specialized subjects and inculcation of critical powers and cultural sensitivity, qualities that define an educated world citizen of today and tomorrow. General education, a key component of undergraduate studies at CUHK, is built upon a balanced approach to whole-person education that combines Chinese humanistic ideals and western liberal arts contents.” (Website of CUHK, 2017 – accessed on 15 August 2017)

General Education echoes the motto of CUHK by considering the breadth of learning: ‘Through learning and temperance to virtue’ (博文約禮). These words of Confucius have long been considered a principal precept of his teaching. It is recorded in the *Analects* that the Master says, ‘The superior man, extensively studying all learning, and keeping himself under the restraint of the rules of propriety, may thus likewise not overstep what is right.’ (Legge's version of the *Four Books*)

During the first post-colonial administration, led by Mr. Tung Chee Hwa, General Education began to gain importance in the academic re-structuring and education reform in Hong Kong (Leung and Choi, 2006). With the commencement of a new '3, 3, 4' academic structure in 2009, Liberal Studies became a core subject for senior secondary schools' years four to six students. At the same time, General Education gained importance in the seven local UGC funded universities (Cheung, 2007), since every university department had an additional year of undergraduate studies during which they could introduce General Education (Cheung et al., 2008). However, there are neither common syllabi nor subject titles for General Education in UGC funded universities. In other words, the characteristics of General Education in each of the universities of Hong Kong are idiosyncratic and unique. Wong (2012) asserted that this is due to the asymmetrical history of the Hong Kong's universities. While Leung and Choi (2006) identified three clusters of General Education in the seven UGC funded universities of Hong Kong according to the *nature of the universities* (Appendix 2.1), this classification of General Education Programs of the universities according to the nature of universities does not provide a useful analytical framework for analysis of Liberal Studies in schools.

2.4 Liberal Studies in Hong Kong – From ASL LS to NSS LS

Liberal Studies is clearly defined in government official documents. As specified in the introduction in Chapter 1, there have been two Liberal Studies curricula, ASL LS and NSS LS, due to the change in academic structure of Hong Kong. The meanings of ASL LS and NSS LS have been changing along with curriculum reforms. In the following section, the slippery nature of Liberal Studies curricula is discussed.

2.4.1 Definitions of ASL LS and NSS LS

The first Liberal Studies curriculum was introduced as an ASL subject in 1992. In *Hong Kong Liberal Studies: Draft for 2nd Consultation*, published by the Hong Kong Education Authority (HKEA) and *Syllabus for ASL LS*, published by the CDC, the term Liberal Studies was defined:

“The name Liberal Studies is meant to suggest that this subject is designed to help liberate the minds of our students by having them study a wide range of issues that have impact on their daily lives, and in the process requiring them to take a fresh look at Hong Kong and the wider world, without the constraints that typify many of the other academic level subjects which they will be studying.” (HKEA, 1990:1; CDC, 1996:6)

The second Liberal Studies curriculum, NSS LS, was first published in *Curriculum and Assessment Guide* after a series of public consultations in 2007. It was subsequently refined in the *Curriculum and Assessment Guide* in 2014 and the term

Liberal Studies was defined as:

“Liberal Studies aims to broaden students’ knowledge base and to enhance their social awareness through the study of a wide range of issues. The modules selected for the curriculum focus on themes of significance to students, society and the world, designed to enable students to make connections across different fields of knowledge and to broaden their horizons. The learning experiences provided will foster students’ capacity for life-long learning, so that they can face the challenges of the future with confidence.”

(CDC and HKEAA, 2007:13; *ibid*, 2014:13)

The definitions of ASL LS and NSS LS are not static. Both ASL LS and NSS LS are considered by the CDC and examination authorities to broaden the horizons of Hong Kong’s students. However, NSS LS serves the purposes of enhancing social awareness and life-long learning, which were not included in the ASL LS curriculum. Moreover, NSS LS performs an additional function of connecting knowledge across different fields. NSS LS is designed to balance the learning of arts and science subjects at the senior secondary level.

2.4.2 Changing Nature of Liberal Studies from ASL LS to NSS LS

In this section, the changing nature of ASL LS and NSS LS is further elaborated. The discussion is further divided into curriculum background, curriculum content, learning and teaching, and pedagogies and assessment.

The curriculum backgrounds of the two curricula are contrasted. ASL LS mainly

aims at opening horizons and exposure of students to understanding more about mainland China (Morris and Chan, 1997a). The emergence of ASL LS in 1989-1991 was due to the government's response to the changing socio-political contexts, post 1984, as Hong Kong prepared for the return of sovereignty from the United Kingdom to China (ibid). Initially, the recommendation of the Working Group on Sixth Form Education (1988-1989) was to make ASL LS a core subject to be taken by all the sixth form pupils (Education Department, 1989).

In *Education Commission Report 2*, the Education Commission, which reported to the Hong Kong government, considered that three AL courses plus the 'Use of English' were too narrow. The Commission proposed Intermediate (I) level, half the subject weight of Advanced Level (AL), to broaden the students' horizons. I level was, thus, the precursor of ASL

"We [Education Commission] believe that the A level curriculum as adopted in Hong Kong is of a high academic standard, but in its common application of three A level courses represents too narrow a concentration of subjects, both in terms of students' requirements for general educational purposes and, in our view, as a preparation for higher education."
(Education Commission, 1986: 80)

In *Education Commission Report 3* (Education Commission, 1988), it was reported that the public were supportive of the aim of broadening the curriculum. After a

public consultation, ‘courses of a general nature in arts and sciences, not based on existing AL courses’ were modified to become ASL courses and to take place at the end of Secondary 7. ASL LS was eventually implemented in 1992.

Education reform in 2001 was the cradle for NSS LS. The CDC published a document in 2001 entitled *Learn to Learn – Lifelong Learning and Whole Person Development*. NSS LS, as a part of *Learn to Learn*, was to serve three purposes:

- to enhance pupils’ **awareness** of their society, their nation, the human world and the physical environment, as well as develop positive values (Awareness);
- to **broaden** their knowledge base and expand their perspectives on things (Broadening); and
- to **connect** knowledge across different disciplines and enhance their Critical thinking skills (Connection skills and Critical thinking). (EDB, 2009)

Learn to Learn originated from the society-wide consultation and a comprehensive review of the local education system launched by the Hong Kong’s first Chief Executive (CDC, 1999). Major reform proposals, curriculum documents, and guidelines were published in subsequent years (CDC, 2000b, 2001a, 2002 and Education Commission, 2000). Instead of focusing on specific aspects, Education Reform in the 2000s aimed comprehensively to cover educational aims, values, and

directions for more effective learning (Yu and Lau, 2006). A vision for the new generation in education and life-long learning was cultivated (Education Commission, 2000). In the new curriculum framework, nine generic skills underpinning the key learning areas made up of subject matter knowledge were emphasised for the development of students through learning and teaching in different subject contexts.

The shift toward a student-centred approach seems to have resulted in improvements, as suggested above. In *Learning to Learn: The Way Forward in Curriculum Development* (CDC, 2000b), a consultation paper prepared by the Education and Manpower Bureau (EMB), learning to learn is identified as the key to the success of our future students. It points out that the development of generic skills and values and attitudes is crucial to students so that they can meet the needs of the changing society and environment. Its summary states that the overall aims of education for the 21st century are:

“To enable every person to attain all-round development in the domains of ethics, intellect, physique, social skills and aesthetics according to his/her own attributes so that he/she is capable of life-long learning, critical and exploratory thinking, innovating and adapting to change; filled with self-confidence and a team spirit; willing to put forward continuing effort for the prosperity, progress, freedom and democracy of their society, and contribute to the future well-being of the nation and the world at large.” (ibid: 1)

NSS LS has been designed to synchronise with the overall education aims of *Learn to Learn*.

Against this changing background, the content of the two curricula were also re-structured from ASL LS to NSS LS. The curriculum contents of two subjects are contrasted in Table 2.1.

	ASL LS	NSS LS
Curriculum Structure/ Organisation	Modular Approach	Student-oriented design Liberal Studies uses knowledge and perspectives from other subjects to study contemporary issues so that students have the opportunity to: ● Connect knowledge and concepts across different disciplines ● Expand perspectives beyond single discipline ● Study contemporary events not covered by single discipline ● Benefit from flexible organisation and progression of studies. (interconnection among three areas of study)
Learning and teaching approach	Issue enquiry approach	Issue enquiry approach
Time allocation	180 periods for 2 years	270 hours for 3 years (180 hours for all six modules and 90 hours for IES)
Student Characteristics	Around top 40% of students selected from the HKCEE Age group around 17-19	All students of under NSS academic structure Age group 15-18
Assessment	Written examination (80%) One project report on one of the two selected modules (20%)	Written examination (80%) Independent Enquiry Studies (IES) from the existing module (20%)

Table 2.1 Comparison between the Curriculum Content of ASL LS and NSS LS (Source: CDC, 2000a; CDC and HKEAA, 2007, Modified from Leung, 2009a)

In ASL LS, the schools were expected to choose two modules out of six for the ASL LS students (CDC, 2000a). Under the NSS LS curriculum, students are required to

study all three Areas of Study (6 Modules, with a total of 12 Themes) drawn from Personal, Social, and Humanities Key Learning Area, Science Key Learning Area, and Technology Key Learning Area (Leung, 2009a). The subject adopts a student-oriented design that appears to foster students' active learning through using an integrated approach to curriculum design.

NSS LS largely inherits the curriculum content of ASL LS. Table 2.2 maps the topics between ASL LS and NSS LS (CDC, 2007 and 2014).

ASL LS	NSS LS	Remarks
Human Relationships	Personal Development and Interpersonal Development	Share ASL LS content
Hong Kong Studies	Hong Kong Today	Share ASL LS content
China Today	Modern China	Share ASL LS content
The Modern World	Globalisation	Share ASL LS content but more focus on contemporary issues
Science, Technology and Society	Energy, Technology and the Environment	Combine two modules of ASL LS content
Environmental Studies		
Nil	Public Health	A new module

Table 2.2 Curriculum Change from ASL LS to NSS LS

Both ASL LS and NSS LS consist of six modules. In NSS LS, the three modules of 'Personal Development and Interpersonal Development', 'Hong Kong Today' and 'Modern China' are similar to the ASL LS 'Human Relationships', 'Hong Kong Studies', and 'China Today'. 'Globalisation' in NSS LS resembles 'the Modern World' in ASL LS but with more focus on contemporary world issues than history. CDC combines 'Science, Technology and Society', and 'Environmental Studies' of

AS LS into 'Energy, Technology and the Environment' in which sustainable development becomes a crucial organising concept. 'Public Health' was a totally new module in response to the issues of Severe Acute Respiratory Syndrome (SARS) and avian flu in Hong Kong.

NSS LS a three-year senior secondary compulsory subject in the new academic system commencing in 2009 while ASL LS is a two-year matriculation elective subject from 1992 to 2012, i.e. the old academic system. NSS LS is different from ASL LS in terms of the depth and breadth of the curricula. NSS LS emphasised a boarder but less deep curriculum than ASL LS. Citing the example of 'Human Relationships' in ASL LS, there were six core questions (CDC, 1990). ASL LS sought a deeper understanding of the chosen module. However, given four modules to be covered in NSS LS, the purpose is to achieve a more comprehensive but not so deep understanding in the modules.

In terms of the learning and teaching pedagogy, both Liberal Studies curricula adopted the 'issue enquiry' approach. The issue enquiry approach is the key learning and teaching approach of Liberal Studies; although its application is not only

confined to Liberal Studies but has also been adopted in other Science and Humanities subjects.

“[The] Issue enquiry approach, which literally means that learning takes place through enquiring into issues, has been used in various disciplines, such as science, social science, as a way of exploring and developing knowledge – and indeed can be traced back the teaching methods of classical Greek philosophers Socrates and Plato.” (Fung et al., 2011:37)

According to John Dewey (1938), enquiry begins when there is doubt and ends when the doubt is removed or the question settled. This process brings “facts before the mind that enable a person to reach a conclusion on the basis of evidence” (Dewey, 1933:13). Fung et al. (2011) draw four conclusions from Dewey’s views on enquiry:

“Enquiry is.....

- *driven by problems and questions;*
- *experiential and empirical;*
- *culturally and contextually related; and*
- *heavily reliant on our senses and language.”* (p.383)

In parallel with the importance of ‘enquiry’, in an issue enquiry approach classroom, students are engaged in self-directed learning processes and teachers are the facilitators in these learning processes. Students are the key persons to make their own judgments. Therefore, with the use of the issue enquiry approach, Liberal Studies draws on a constructivist approach in learning and instruction (Ng, 2006).

This is based on the idea that students use their prior knowledge or daily experiences to construct a personally meaningful understanding of new content or experiences. The cognitive processes involved enable the students to organise and integrate the knowledge in a mental / conceptual model that becomes a “knowledge representation in working memory” (Mayer, 1999:144).

The instructional approach of ASL LS envisaged that issues would be used to study across the modules.

“The name Liberal Studies is meant to suggest that this subject is designed to help liberate minds of our students by having them study a wide range of issues that have impact on their daily lives, and in the process requiring them to take a fresh look at Hong Kong and the wider world, without the constraints that typify many of the other academic level subjects which they will be studying.” (CDC, 1996:4)

In the NSS *Curriculum and Assessment Guide* of Liberal Studies, the option of using the issue enquiry approach is more explicit when compared with ASL LS curriculum.

“...the learning and teaching of Liberal Studies is structured around enquiry into a range of contemporary and perennial issues. Students should be helped to appreciate the changing, complex and controversial nature of these issues and encouraged to pose questions and look for answers. As students explore the issues, they are encouraged to bring in their own experiences and have access to first-hand information. Students should learn to see issues and information from multi-perspectives and evaluate different points of view.” (CDC and HKEAA, 2007:77)

In the recent interpretation of Liberal Studies, CDC has broadened the purposes of issue enquiry approaches into experiential learning, learning of generic skills such as data processing and interpretation, and fostering a sense of multiple perspectives (CDC and HKEAA, 2007 and 2014).

Another similarity between ASL LS and NSS LS is in the assessment. Both ASL LS and NSS LS emphasise public written examinations; which account for 80% of the total marks. In order to achieve the curriculum objectives, more open-ended questions, data-response questions, and extended-response questions are set. In ASL LS, students were also required to submit a project, carrying 20% of the subject marks, on one of the two modules selected (HKEAA, 2008). Similarly, School-based Assessment called Independent Enquiry Studies (IES), encouraging exploration of multiple perspectives and use of multi-faceted skills, is conducted by NSS students. The students can choose to present the product in written or non-written forms, such as a product plus a short piece of reflective writing (CDC and HKEAA, 2007 and 2014).

2.5 Liberal Studies as a Component of Civic Education

Liberal Studies played crucial role in the history of civic education in Hong Kong from 1992's ASL LS and subsequently 2009's NSS LS. Nevertheless, civic education subjects were offered well before ASL LS. Civics was taught in vernacular schools and was first offered as an examination subject in 1950. Economic and Public Affairs replaced civics in 1965. Junior secondary Social Studies was introduced by Education Department in 1972 and this subject was extended to the senior secondary level in 1984. In the late 1980s, a new subject, government and public affairs was introduced at the senior secondary level (Lee, 1999). Civic education has been shared by different subjects in Hong Kong. Nonetheless, as distinct from early colonial period, Liberal Studies brought a more politicised approach to teaching civic education, involving analysing political issues.

Civic education is a shifting concept; its meaning in Hong Kong has varied during and since the colonial period. This section does not aim to analyse civic education deeply but to focus on the changing role played by Liberal Studies in civic education along the timeline of this concept. The main purpose of this section is to outline the main phases in the evolution of Liberal Studies as an element of civic education during the period against the background of the politics of the period.

Three phases of civic education were identified by Leung and Ng (2004): “(1) before 1984, depoliticisation by the state and the school; (2) 1984-1997, the politicisation of the intended curriculum; and (3) 1997 onwards, re-depoliticisation of civic education and official affirmation of nationalistic education.” (pp.44-45)

These phases of civic education correspond broadly to the phases in the changing political scenario in Hong Kong.

2.5.1 Before 1984: Depoliticisation by the State and the School

Prior to 1984, the Hong Kong government largely avoided developing civic education in Hong Kong due to the complexity of Hong Kong society and politics. Yuen et al. (2016:61) asserted that “colonisation, internal riots, political changes in China and the subsequent reunification with China impacted and circumscribed the development of civic education enormously.” Before 1980s, the political struggle between the Kuomintang of Taiwan and the Communist Party from 1949 through the mid-1960s created a tense social atmosphere in the colony. In the 1960s and 1970s, the Cultural Revolution of China led to turmoil and chaos in Hong Kong. Civic education of a political nature was deemed potentially explosive and was essentially depoliticised (Morris and Chan, 1997a).

Under this scenario, civic education was largely confined to the three-year junior secondary subject Economic and Public Affairs, and much emphasis was put on the description of Hong Kong as a colony of the United Kingdom (Chan, 1996). The teaching of politics and political debates were not encouraged, and students were not introduced to, or encouraged to take part in, any political activities, but to obey the law and be obedient to the government (Fok, 1997). The role of civic education was negligible in Hong Kong before 1984.

2.5.2 1984-1997: The Politicisation of the Intended Curriculum

The signing of Sino-British Joint Declaration in 1984 brought about a turning point from the period of depoliticisation and centralisation to an era of politicisation and decentralisation in civic education (Leung and Ng, 2004). The Joint Declaration signed by Britain and China in 1984 promised self-rule of Hong Kong people under ‘One Country, Two Systems’ after 1997. This implies that people of Hong Kong were going to acquire a new identity as citizens of People’s Republic of China (PRC) and the colonial government had to prepare Hong Kong citizens with the necessary competence and political orientation to face these political changes, including through education. The colonial government had to accept such sensitive issues as political participation and the study of the PRC as essential components of the

formal curriculum (Morris, 1997). As a result, there were calls for more understanding about Hong Kong and China, and a concept of ‘identity’ emerged which embraced people’s dual identities as both Hong Kong people and Chinese.

Against this background, several civic education initiatives were brought about. *Civic Education Guidelines* were released to define the scope of civic education in 1985 (CDC, 1985). Under these *Guidelines*, Morris and Cogan (2001) asserted that “civic education aimed at permeating curriculum via whole school approach” (p.110) and “producing responsible, moral citizens in order to maintain social order and stability” (p.114). Thus, schools were given a new subject, Government and Public Affairs, first examined as an A-level subject in 1988 and as a Certificate-level subject in 1989. This subject placed emphasis on concepts which are central to liberal western democracies such as the rule of law, representation, consultation, elections and on the study of political processes in China (Bray and Lee, 1993). The roots of ASL LS lie in the *Civic Education Guidelines* of 1985. The modules were structured around the themes of the *Guidelines*. The major point to note was the inclusion of Hong Kong Studies and China Today in ASL LS. Through the issue enquiry approach, the Education Department hoped that students would develop

understanding of the economic, social and political facades of Hong Kong and China.

A further edition of the *Civic Education Guidelines* was published in 1996 (CDC, 1996). The new *Guidelines* promoted learning for democracy; this was believed to be the result of the political reforms introduced by Mr. Chris Patten, the last Governor of Hong Kong¹. Although the *Guidelines* were issued in 1996, their influence on ASL LS was limited because ASL LS was first delivered in 1992 and the short period that had passed limited changes to the curriculum. At the same time, the Beijing Government was strongly against the Patten reforms; hence, the Education Department was in a dilemma as to whether to take an active role in promoting democracy and universal suffrage.

2.5.3 1997 Onwards, Re-depoliticisation of Civic Education and Official

Affirmation of Nationalistic Education

Civic education was loosely defined in the colonial period, and scattered across the curriculum: in Chinese, Chinese History, Economic and Public Affairs, Geography and Government and Public Affairs. During the post-colonial period, the HKSAR

¹ Shortly after Chris Patten took up appointment as Governor of Hong Kong in July 1992, he revealed a series of reform packages for the plan for 1994-95 electoral arrangements during his first policy address in October 1992 (Liu and Yu, 1996).

government attempted to reshape the concept. On 1 July 1997, the sovereignty of Hong Kong was returned to China as a Special Administrative Region under the principle of ‘One Country, Two Systems’ as stipulated in the Basic Law.

Nationalism or patriotism was introduced “as a new official ideology by the new government to show loyalty to the central Government ... and to solve the problem of legitimization or government crisis ...” (Tse, 2007:231-232). National education has been promoted and implemented with a high-profile, but it has encountered opposition from within the education sector and from some Hong Kong citizens.

In the post-colonial period until 2014, the period studied in this thesis, three main reform proposals on civic education were put forwarded by the Chief Executives: *Learn to Learn: Life Long Learning and Whole-person Development*; the replacement of civic education by moral and civic education (MCE); and moral and national education (MNE). In 2001, the Hong Kong First Chief Executive Mr. Tung, Chee Hwa announced the curriculum document: *Learning to Learn: Life Long Learning and Whole-person Development* (CDC, 2001a). This proposed a major step backward by attempting to re-depoliticise civic education (Leung and Ng, 2004).

The purpose of this re-depoliticisation was to rectify the *Civic Education Guidelines* of 1996 (which paralleled the radical constitutional development launched by the last Governor).

The name ‘civic education’ was replaced by ‘moral and civic education’: this diluted the political aspect. The related concepts of moral and civic education appeared in the sections of ‘Four Key Tasks’ (CDC, 2001b:viii, 83 and 84) and ‘Five Essential Learning Experiences’. In the Four Key Tasks section, apart from civic education, sex education, religious education, ethics and healthy living were included. In the Five Essential Learning Experiences section, the document restated the aims of education of moral and civic education as “developing personal character and interpersonal skills, respect for others, perseverance and national identity” (p.20). The comment that the component of moral education was stronger than civic education in Hong Kong, a comment made in 1990, was still valid about the 2001 reform (Wong, 1990).

In *2010-2011 Policy Address* on 13 October 2010, Chief Executive Donald Tsang, Yum Kuen proposed the replacement of MCE by MNE to ‘strengthen national

education’ and ‘build our nation’. The government planned to introduce the new subject in primary schools in 2012 and secondary schools in 2013, and carried out a four-month consultation in 2011. Following opposition from the public, the government postponed the commencement of the subject.

MNE was particularly controversial for applauding the communist and nationalist positions of China’s government on the one hand, and criticising republicanism and democracy on the other. The 18-month MNE controversy involved numerous marches, public protests and strikes (Morris and Vickers, 2015). This subject was withdrawn in 2012. The controversy may have trained secondary school students as leaders to challenge the legitimacy of the government. Some of them became leaders of the Occupy Central and the Umbrella Movement in 2014.

NSS LS is unique as it is meant to transcend the traditional confines of subject boundaries and to enable students to become informed, rational and responsible citizens of the local, national and global community (CDC and HKEAA, 2007:4). Compared with the ASL LS aim of understanding Hong Kong and China, NSS LS

seeks to develop students' sense of citizenship and identity in a wider context. Yuen et al.'s studies (2016) have concluded that NSS LS has enhanced students' social awareness and their ability to take part in public debates, but not that it affected their social and political participation.

2.6 Theoretical Frameworks to Understand ASL LS and NSS LS

2.6.1 Theory of Aims of Education by Morris 1995

Morris (1995) pointed out that “our views on educational aims and the other curriculum components reflect a set of images, orientations conceptions, or ideologies which involve beliefs and assumptions about the learners, schooling and about society” (p.8). There are four main images suggested by Morris, including academic rationalism, social and economic efficiency, and child-centred and social reconstructionism (ibid). The curriculum conceptions and curriculum components of the four images are shown in Table 2.3.

	Academic Rationalism	Social and Economic Efficiency	Child-centred	Social reconstruction
Intentions	To enhance pupils' intellectual capabilities and cognitive skills, and to teach them how to learn.	To provide for the current and future manpower needs of a society.	To provide pupils with opportunities for enhancing their personal and intellectual development.	The school serves as an agent for social reforms, changes, and criticism.
Content	Focus on the knowledge, skills and values derived from the academic disciplines.	Focus on knowledge and skills that are useful and relevant to future employment.	Focus on knowledge as an integrated holistic entity and on the process of learning.	Focus on social needs, issues, and ideals.
Learning and teaching methods	Focus on teacher exposition and didactic teaching, and on-promoting enquiry skills	Emphasise application and skill mastery	Emphasise pupils' activity and self-learning, and the teacher as facilitator	Focus on interaction, group work, and students' individual involvement in community
Assessment	Emphasise testing of pupils' knowledge, skills, and on academic rigour	Emphasise assessing pupils' ability to apply	Focus on qualitative measures that attempt to analyse the process of learning	Focus on the need to involve pupils in their own measurement

Table 2.3: Curriculum Conceptions and Curriculum Components (Source: Morris 1995)

With reference to four aims of education, ASL LS can be classified under ‘academic rationalism’: its main purpose was to broaden the horizons of Advanced Level students by increasing their knowledge of Hong Kong and China. The modular approach of ASL LS attempted to break through the boundaries of the disciplinary subjects, though it was unsuccessful. The teaching approach in ASL LS remained didactic, which was much the same as in traditional subjects. NSS LS may be regarded as more ‘social reconstructist’ because critical thinking and social awareness have been nurtured through the curriculum.

2.6.2 Curriculum Integration

An integrated curriculum is one of the intended features of both ASL LS and NSS LS, but the degree of integration varies. Curriculum integration is a contested term and has a diversity of meanings and models. Tyler (1949, p.85), suggested that integration is a horizontal relationship of curriculum experiences, intended to help students to obtain a “unified view”. In other words, real curriculum integration treats knowledge as a holistic object of learning rather than as being discrete and fragmented.

Jacobs (1989), Drake (1993) and Fogarty (1991 and 2002) suggested four respective curriculum integration approaches: mono-disciplinary, multi-disciplinary, inter-disciplinary, and trans-disciplinary. The approaches are summarised in Table 2.4.

Approach	Proponent	Year	Content of Approach
Mono-disciplinary	Jacobs	1989	There is no connection between the modules taught.
Multi-disciplinary	Drake	1993	The two modules taught are linked by some common themes. There are some common elements among the two modules taught.
Inter-disciplinary	Fogarty	1991	Focus on the integration across the modules. Emphasis on the applying the generic skills across the modules.
Trans-disciplinary	Fogarty	2002	The higher order and the most difficult approach to achieve. The two modules are transcended and embedded naturally. There are no discipline boundaries between the modules taught. The theme, strategies, and skills are merged together, and the theme is set in its real life context determined by the learners.

Table 2.4: Approaches of Curriculum Integration

These different approaches to curriculum integration can be employed to examine the ASL LS and NSS LS curriculum according to the degree of knowledge connectivity.

ASL LS adopted a ‘modular approach’ of curriculum organisation (CDC, 1996:6 and 2000a:6). The students studied two modules without much integration. ASL LS took a mono-disciplinary or multi-disciplinary approach depending on how many teachers were assigned to teach one class. Two practices emerged in the schools; either the two modules were taught by one teacher or by two teachers. In the latter case, the two modules were treated in a discrete way and ASL LS did not differ from mono-disciplinary approach. In the former case, ASL LS exhibited the multi-disciplinary approach because the teacher had the opportunity to associate the teaching of two modules.

NSS LS looks for a higher degree of curriculum organisation because it stresses connectivity across the three areas of study and “development of multi-perspectives on perennial and contemporary issues in different contexts” (CDC and HKEAA, 2007:5). The overall curriculum structure of NSS is shown in Figure 2.1. Students have to enrol in four compulsory subjects - Chinese Language, English Language,

Mathematics, and Liberal Studies. In addition, the students are also encouraged to engage in ‘Other Learning Experiences’, such as voluntary services, exchange tours, and to record their ‘Other Learning Experiences’ in the Student Learning Profile. Apart from the compulsory subjects and ‘Other Learning Experiences’, the student should study at least two elective subjects to a maximum of three elective subjects (labelled as X1, X2 and X3). As shown in Figure 2.1, EDB has placed NSS LS in a key position which connects all other compulsory subjects, ‘Other Learning Experiences’ and elective subjects and the curriculum in a nested and coherent way (CDC and HKEAA, 2007).

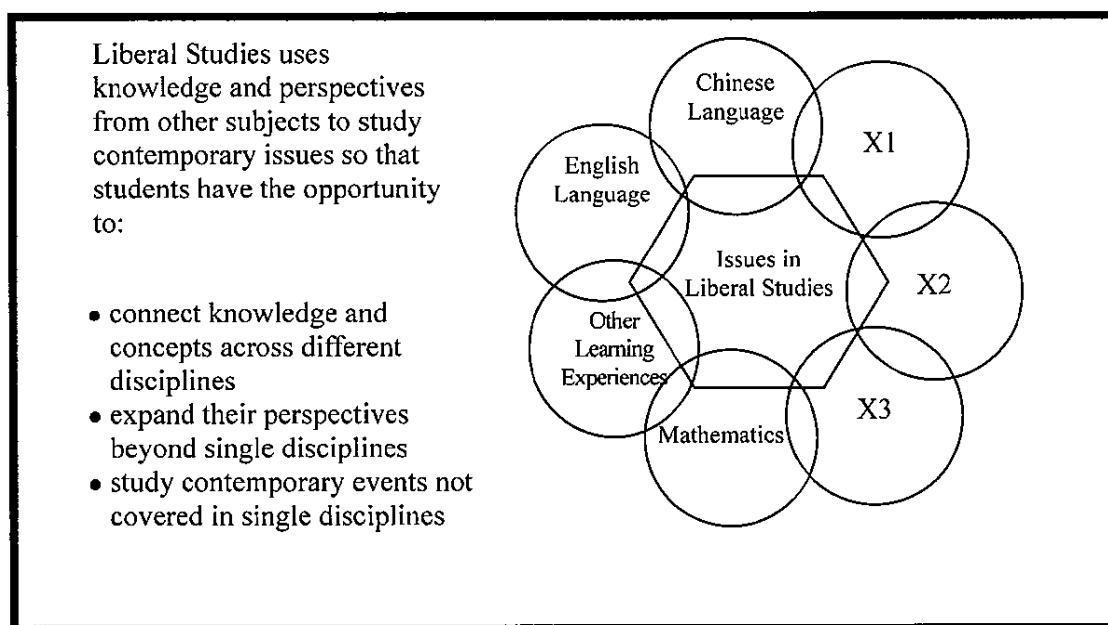


Figure 2.1 Liberal Studies and the Three-year Senior Secondary Curriculum
(Source: HKEAA and CDC (2007) CDC Guideline)

NSS LS, therefore, interactively combines knowledge and perspectives from other subjects/learning opportunities, in which the students can:

*“connect knowledge and concepts across different disciplines;
expand their perspectives beyond single disciplines; and
study contemporary events not covered in single disciplines.”*

(CDC and HKEAA, 2007:3).

With stronger linkage between the six modules as well as the whole NSS experience, NSS LS explores cross-curricular issues, so this syllabus therefore more effectively follows inter-disciplinary and trans-disciplinary models.

2.7 Chapter Summary

This chapter has defined the key terms ‘Liberal Education’, ‘General Education’, and ‘Liberal Studies’ from the literature. In Hong Kong, ‘General Education’ and ‘Liberal Studies’ refer to the courses offered to university level and senior secondary level students respectively. As CUHK was the pioneer university offering General Education, the context of General Education in CUHK helps provide a more precise and effective picture of the scene of general education in universities in Hong Kong. Comparing the curriculum background, curriculum content, learning teaching and assessment helps illuminate the evolution of Liberal Studies from ASL to NSS. Liberal Studies has been viewed as part the development of civic education. Three phases of civic education development in Hong Kong have been reviewed.

Two curriculum theoretical frameworks were applied to examine ASL LS and NSS LS. In terms of the framework of aims of education by Morris (1995), ASL LS can be broadly classified as a curriculum of ‘academic rationalism’ while NSS LS is a curriculum of ‘social reconstruction’. The curricula of Liberal Studies were organised in an inter-connected way but the degree of connectivity varies between ASL LS and NSS LS. ASL LS employed a ‘modular approach’ with weak linkage between themes and was offered on a multi-disciplinary basis. NSS LS has six well-connected themes. Moreover, NSS LS is designed to link up with other NSS subjects. Therefore, NSS LS is delivered through a trans-disciplinary approach.

Chapter Three

Literature Review (II)

Factors Shaping the Development of Curricula

3.1 Introduction

This chapter reviews the major literature explaining the factors shaping the development of curricula. This chapter starts by defining the meaning of ‘curriculum’ and then discusses the reasons for studying the history of curricula. These set the scene for further reviewing the literature about the factors shaping the development of curricula.

This chapter also reviews literature related to the second research question: What were the factors affecting the development of Liberal Studies from 1992 to 2014?

Factors shaping curriculum history have been divided by curriculum historians into different levels, though often the meanings applied are inconsistent as between different studies. The meanings of the three levels in this study are defined and explained.

Liberal Studies has been implemented in Hong Kong for over twenty years (since

1992), and the curriculum development of Liberal Studies has been examined in the literature through studies of its nature, pedagogy and policies (Deng, 2009; Morris and Chan, 1997a; Morris and Scott, 2003). However, there are few published studies on its history. There is one doctoral thesis studying the ASL LS, and the author has been willing to share its findings, but agreed to do so only on an anonymous basis. To enrich the present study, literature on the historical development of other subjects in Hong Kong is also discussed.

3.2 The Definitions of Curriculum

Defining the general meaning of curriculum sets the broader context for discussing Liberal Studies curricula in Hong Kong. ‘Curriculum’ can be defined from more than a single perspective. Curriculum developers *plan* the curriculum. Teachers and students both engage in the *learning* process. For example, curriculum developers are the individuals who draft the central curricula of Hong Kong. Teachers use this central curriculum as the foundation from which they tailor-make school-based curricula, according to their perspectives of the *needs* and ability of the students. These suggest that the concept of curriculum is multi-dimensional and comprehensive; this should be emphasised in the description and explanation of a curriculum history.

3.2.1 Curriculum as planning

A curriculum is usually taken as planned learning content or experiences. Zias (1976:13) considered the curriculum as a “program of studies”, the “course content”, “planned learning experiences”, “a structured series of intended learning outcomes”, and “a written plan for action”. Like Zias, Wiles, and Bondi (1998:22) stated that “A curriculum is a plan for learning”. They all viewed the curriculum as plans containing a vision of what should be and how to translate those visions into learning experience.

3.2.2 Curriculum as Learning

Recently, and in a similar thought, Posner (1992) highlighted six components of curriculum: scope and sequence, syllabus, content outline, textbooks, course of study, and planned experiences. Some authors prefer to consider curriculum and its impacts on pupils. Ross (2000), for instance, defined a curriculum as what is to be learned. This approach includes deliberate planning and organisation, unwitting encouragement, or hidden and unrealised assumptions, all of which affect pupils’ learning.

3.2.3 Curriculum as Recognising the Needs of Students

Similar to Ross, Knowles and Brown (2000:73) summarised curriculum as “the total

experience of students at school, a plan that involves students in learning, a construct that enables student to access, process, interpret, and make connection to information”. The gaining of knowledge, development of skills, and the change in values and attitudes are the possible impacts of the curriculum (Doll, 1989). As curriculum on this approach is every event that occurs in the life of students from the time they enter school until the day they leave, designing a curriculum needs to identify, and address the needs of students, their needs of as social beings, and the specific environment of the school.

Curriculum as planning, curriculum as learning and curriculum as recognising the needs of the students are three major components in the concept of curriculum. They are useful sub-concepts of curriculum in analysing Liberal Studies.

3.3 Reasons to Study History of Liberal Studies

The examination of history of curriculum, as a specialised field of study, first began in the 1930s, but it was not until the 1960s and early 1970s that systematic and scholarly work emerged. The first issue of *History of Education* was published in 1972 (Goodman and Martin, 2004). Many studies in the history of education address debates concerning the subject matter, purposes, and methodology of the curriculum.

According to Kliebard and Franklin (1983), the study of curriculum history can enhance our understanding of the ways in which a school curriculum reflects social values at a particular time. It is a statement of what a society at a given period wishes to pursue and to pass on to future generations. Studying the history of the curriculum reveals what a society over time values and seeks to perpetuate.

Goodson and Marsh (1996:1) share a similar belief that school subjects reflect social and political constructions. These are manifested in the curriculum provision, content, and form of the school subject. A critical examination of the history of school subjects can illuminate how and why certain knowledge was incorporated in the curriculum to become a 'tradition' of the subject. The history of curriculum development can lead us to see how such work limits are not given or fixed but produced through the conflicting actions and interests of men and women in history.

Also, grounded in the view that curriculum is socially and politically constructed, Tanner (1982) suggested that a study of curriculum history is beneficial to curriculum change:

“The study of curriculum history can identify past problems that have interfered with curriculum reform, which may provide lessons to help contemporary curriculum workers” (p.406-07).

Research into curriculum history in the Hong Kong context was quite sparse before 2000. Some examples include a curriculum history of History as a subject by Vickers (2000) and of Social Studies by Wong (1992). However, there has been a blossoming of research since 2000, which has gradually reduced the research gap of the history of curriculum in Hong Kong.

Comparative education studies have been conducted on History as a discipline across China, England, and Hong Kong (Sin, 2001). Kan (2002) studied Chinese curriculum development in Hong Kong from 1946 to 2001. Kan and Vickers also contributed, by analysing the special curriculum phenomena of two History subjects in Hong Kong (Kan, 2010; Kan and Vickers, 2002). Other studies, such as the role of Catholic Education during the decolonisation period (Tan, 1997b), factors affecting English language in early colonial Hong Kong (Evans, 2008), and Technical Education development in Hong Kong (Lau and Kan, 2011), have also been published.

The study of the history of Liberal Studies is distinctive from the aforementioned subjects. People generally perceive history as involving a lengthy time span. Despite this, Wan's (1991) study on the ASL LS curriculum can be searched in Google Scholar but unluckily this master thesis cannot be located in the electronic library of

HKU, further literature review cannot be conducted. A doctoral thesis examining the perspectives on governance of curriculum-making ASL LS curriculum has enshrined to the historical study of ASL LS and the detail is reviewed in Section 3.4.

The curriculum history of Liberal Studies within the short study period included major socio-political events of Hong Kong such as the proposal of the Llewellyn Report on broadening the Advanced Level subjects, the signing of Joint Declaration, the change of academic structure since 2009, and the Umbrella Movement. This makes it meaningful and significant to study the curriculum history of Liberal Studies.

3.4 Prior Studies on Liberal Studies

Despite the limited extent of research on the history of Liberal Studies in Hong Kong, there are two theses which deepen our understanding. I was informed of the existence of these theses by Professor Paul Morris. However, access to them is restricted; they are not, for instance, mentioned in the relevant university's electronic library catalogue.

I therefore contacted the author by email requesting permission to read the two theses. The author explained that access is restricted because many of the actors are still on

the scene.

The author has, however, engaged with me in a positive and constructive way. Following a series of emails, the author agreed (after reading my research questions) to lend the PhD thesis for me. Three conditions were imposed: (1) the author's identity should not be disclosed; (2) the title of the PhD thesis should not be disclosed, and (3) the relevant section of my thesis (viz, section 3.4) should be read and agreed by the author.

The doctoral thesis explores the innovations of curriculum initiation, curriculum design and curriculum adoption of ASL LS using a multi-perspective approach (namely, ideological, organisational and political perspectives), recognising of the changing social, economic and political contexts within which the innovation occurred.

The ideological, organisational and political perspectives complement each other in explaining the introduction of Liberal Studies as a core sixth form subject. The author seems to support ASL LS from the ideological interest of school actor, government, the examination authority and the universities.

Likewise, the ideological, the organisational and the political perspectives are all used to describe and explain the curriculum design of ASL LS. The ideological perspective explains how the curriculum design of ASL LS was a compatible amalgam of educational ideologies which included social and economic efficiency, social reconstructionism and child-centredness (See Table 2.3, drawn from Morris 1995). The most crucial aim of ASL LS was broaden knowledge and nurture students' critical thinking.

The decision on adoption of the ASL LS curriculum was dominated by the lack of a mediating agency. Universities had a superordinate position, whereas government and school were subordinate in the process. It takes the view that the evolution of ASL LS was grounded on the need of society.

The study concluded that the governance of a sixth form ASL LS curriculum was driven by institutional interests. Responses to the changing contexts were influenced by struggles between government, schools, universities, and the examination authority.

3.5 Justification for Using Levels of Factors in Analysing the Factors Shaping the History of Liberal Studies

Curriculum researchers often classify the factors affecting the curriculum and its history into different levels. In this section, prior studies are cited to illustrate the use of levels of factors to analyse the factors shaping curriculum history.

Wan (2005) has described a ‘Confucian managerial ideology’ in Hong Kong schools (p.856), referring to a curriculum reform that is caught up in a political contest at both macro and micro levels; hence, a two-level classification is adopted. Kan (2002), in an attempt to study the Chinese History Curriculum from 1946-2001, divided the factors into three levels: macro (world system theory), meso (socio-political and social-economic factors), and micro (different stakeholders) levels respectively. Vickers and Kan (2003) examined the effect of education on identity and politics in Hong Kong by using local, pan-Chinese and global or international levels. These studies have shown that grouping factors into various levels can facilitate our understanding of curriculum history.

The number of levels and the use of terms to name these levels are not consistent. It is also hard to find a standardised classification on what should be included in specific

levels of factors. A possible reason for difficulty in achieving a standardised classification is diverse nature of individual subjects. Moreover, factors affecting the curriculum are inter-related and complex (Kan, 2002).

In this study, 'level of factors' refers to a layer of similar factors grouped together. The history of Liberal Studies is analysed according to the international, regional and local levels. The international level covers the factors on a global scale. The regional level includes those factors within continents. In the case of Hong Kong, China is the most influential factor. The local level refers to the interplay of actors and stakeholders in Hong Kong. The three levels of factors are defined and arranged in spatial context.

In this thesis, I establish a theoretical framework for analysing the history of Liberal Studies in Hong Kong by using the available literature in education and by drawing the theoretical framework of curriculum history from the literature on other subjects. To facilitate clarity, the literature on each level is discussed separately. Nonetheless, the factors are intertwined and combined to bring out changes. The purpose of this study is to explain the complex interactions of these differing forces, and the varying degrees to which they have affected Liberal Studies.

3.6 International Level Factor

International level factors can be considered in the light of various frameworks. In this thesis, I study the international level factor through the lens of ‘world system theory’. As applied to education, ‘world system theory’ holds the view that global education helps to create a world order, an order grounded broadly in the interests of the Western world. Curriculum content is institutionalised at the world level.

Wirt and Harman (1986), Ginsburg et al. (1990), Kah (1991), and Meyer et al. (1992) discussed ‘the world system’ on national education. They suggested a variety of ways in which a Western-led process of globalisation has influenced the development of education systems worldwide. The educational innovations of the West, and especially of America and Britain, have set standards for other nations. I have to clarify the relationship between ‘globalisation’ and ‘world system theory’, which seem to be closely related but, in fact, different. Globalisation, caused by the advancement of information technology, is a process bringing by creating political, economic and social changes to the inter-connected world. ‘World system theory’ holds the view that dominant countries are influential in influencing the global development of education. ‘World system theory’ is a perspective to examine the change in global education.

On the other hand, Tikly (2001) pointed to the lack of a precise and uniform definition of globalisation making it difficult to apply and assess the applicability of the concept. Law (2004) also argued the lack of consistent definition of globalisation in examining the comparative studies of citizenship education in Hong Kong and Taiwan.

“There is no commonly accepted definition or model of globalisation, and some theorists question whether globalisation is a myth or reality, a prescription or a description” (p.234).

Vickers (2000) criticised ‘world system theory’ as over-simplified and too deterministic. Without doubt, Western education does affect curricula in different places. However, the ‘world system theory’ should be applied carefully; there is no simple cause and effect relationship between Western economic interests and forms of education. This caveat applies particularly in the context of China’s rise as a global economic and political power.

3.7 Regional level Factor

3.7.1 General Background

Regional level factors refer to the influences of specific countries on education in Hong Kong. The influences of the specific countries can be direct or indirect. Hong Kong was a colony of Britain and returned to China in 1997. Britain and China, with intimate relationships with Hong Kong, have had direct impacts on education in

Hong Kong. Other countries particularly Asian countries, such as Singapore, Taiwan, South Korea, and Japan, may also indirectly influence Hong Kong education. There is keen competition in academic performance between Asian countries, creating indirect influences on the curriculum. In this thesis, I focus on direct impacts from Britain and China on the development of education in Hong Kong.

As for the genesis of ASL LS, the main purpose of HKEA was to help students understand Hong Kong and China: the China factor was gaining importance in curriculum development in the period leading to 1997.

“Liberal Studies explicitly included among its major aims an understanding of China and of Hong Kong’s colonial transition. For example, one of its six modules aimed to help students to appreciate the special relationship that H.K. [Hong Kong] and China enjoy and the mutual advantages that flow from that relationship, and to understand better the contribution that H.K. is making, and can make, to China’s modernisation”.

(HKEA, 1994:466).

This period was closely related to the transition of Hong Kong sovereignty from Britain to China, which inevitably influenced curriculum development in hidden and implemented ways. Therefore, colonial rule and the ending of British rule played central role in understanding the development of Liberal Studies. In the following sub-section, the major concepts of sovereignty change are defined; they include colonialism and decolonisation. After that, these three concepts are examined in

greater detail in the international context and Hong Kong experience of colonial rule from the education perspective.

3.7.2 Colonialism and Education in International Context

A colonial relationship is created when one nation establishes and maintains political domination over a geographically external political unit of any race and at any stage of cultural development (Kohn, 1958).

Education usually has a profound influence on a colony; through the colonised people are inculcated with the socio-political, religious, and moral codes of the colonisers. In this sense, colonial government usually attempts to manipulate language policy, medium of instruction and education policy. The British language policy, for example, imposed English as the medium of instruction in the British colonial African and Asian nations. The English language was the official language for British colonies like Hong Kong and Singapore. Even after the detachment of these two colonies, English is still an important medium of instruction in both areas (Whitehead, 1995).

Colonialism has closely related with imperialism which has also often been associated with economic exploitation, suppression of indigenous cultures, and political socialisation of the colonised into imperial cultures. Following these lines of thought,

colonial education systems have been accused of being tools used by capitalists to exploit the underdeveloped world (Watson, 1982).

3.7.3 Decolonisation and Education in an International Context

Colonial powers have significantly faded out since the mid-twentieth century due to the rise of post-war nationalism following the First World War (1914-1918), decline in their economies following two expensive world wars, both in terms of monetary and human capital, declining military and financial assets, and the rise of new super-powers during the second half of the twentieth century.

Bray (1994:37-51) noted that decolonisation had the following characteristics: “more lead time, common integration with the original mother country, fewer military conflicts, and lower nationalist sentiment”. The newly-sovereign states, in building their nations, would start a series of reforms, amongst which the reorientation of education to reflect more strongly the former colonies’ specific cultures and social conditions were regarded as among the most important. In general, the literature on decolonisation and education emphasises the curriculum reform for nation building.

Morrissey (1990), Altbach (1992), and Bray (1997) held similar views that for the sake of nation building, the following actions would be taken by decolonised states: firstly,

they would reform the curricula to portray the emergent nations and their rulers in a different and better light, and to prepare pupils for nationhood; secondly, they would give more prominence to local languages as the media of instruction; and thirdly, they would replace the generalised content of subjects like History and Geography with much stronger local content.

3.7.4 Colonialism and Decolonisation on Education in Hong Kong

Hong Kong ceased to be a United Kingdom colony at 12am on 1 July 1997 and was handed over to the Chinese Government. The periodisation of colonialism and decolonisation in Hong Kong should be understood in relation to the colonial history of Hong Kong. I shall briefly analyse history and politics in the colonial period. In the light of the analysis, I present my arguments to substantiate a periodisation comprising: colonialism (1842 to 1997) and decolonisation (from July 1997 onwards); and the implications for education policy.

As many historians acknowledge, Hong Kong was not a typical colony because in early colonial period the territory was considered as a stepping stone for Britain to reach other places in Asia.

“Hong Kong has no natural resources. Rather, the motive (of conquering HK) was to advance and safeguard British economic interest in the Far East, particularly China.”
(Bray and Lee, 1993:545)

The colonisers established and extended Hong Kong, mainly for commercial and strategic reasons, rather for settlement, due to its lack of natural resources (Sweeting, 2007). This strategic motive very likely provides an explanation for the limited shown by United Kingdom to develop Hong Kong in the early colonial period.

The British motive for ruling Hong Kong changed during the 1960s, perhaps because of the 1967 riots in Hong Kong. Yep (2008) pointed out that MacLehose's need to strengthen governance was closely related to the 1967 riots which, though starting as an industrial dispute, soon erupted into a major crisis. Scott (1989) argued that the riots illuminated the weakness of the socio-political system and pointed to the need for change. They showed that there were insufficient channels for communication between people and government. The riots in 1967 represented a turning point in the history of Hong Kong and the government took active measures to rectify the problems brought by its more half-hearted governance before 1967.

Before Governor Murray MacLehose's tenure, colonial education reflected an apolitical, a-national and alienated subject political culture (Tsang, 1998). Lo (2004) also commented that Hong Kong curricula were "apoliticised or depoliticised before the 1980s" which was a typical characteristic of British colonial rule. Curriculum

organisation has been described as a form of academic rationalism, implying that the subject aims were derived from academic disciplines (Morris, 1995, and see discussion in Chapter two). A curriculum based on academic rationalism tends to discourage lateral thinking and to promote rote memorisation.

The rationale of implementing apolitical curricula in the earlier colonial period was to avoid provoking the Chinese government. Sweeting and Morris (1993) argued that “... education is highly sensitive to and influenced by the changing political realities which have affected Hong Kong. Whilst the overriding motive of the government has been to minimise any threat to its status, this has operated in parallel with the attempt to avoid offending the sensibilities of political leaders in the PRC” (p.214).

Kan (2010) shared the same viewpoint, commenting that “the colonial government was determined to exercise strict control over all aspects of education and to pursue an apolitical school curriculum” (p.267). The curriculum was arranged in a distinctly decontextualised and descriptive range of topics (Morris and Chan, 1997a).

In some respects, the period from the establishment of Hong Kong as a colony to the

1960s can be seen as one of half-hearted colonialism. Official policy in education tended to be apolitical and not to emphasise 'Britishness', perhaps in order not to provoke successive Chinese governments.

The governorship of Sir Murray MacLehose, however, initiated a period of more active colonial rule. However, in the 1980s this more whole-hearted approach to government also coincided with the Sino-British meetings on the post-1997 future of Hong Kong. The combined factors of the change of attitude of colonial rule because of riots and the change of political scene of Joint Declaration shaped the direction of education in Hong Kong. The Joint Declaration created a pressure to nurture citizenship education, emphasising Hong Kong in the context of its motherland (Morris, 1995). Local curricula became more politicised.

The study conducted by Morris and Chan (1997a), while revealing, "... the transition of sovereignty has created a series of symbolic acts designed to accelerate the shift away from a focus on a depoliticised and decontextualised curriculum content, has also observed that there has been a limited impact at the school level, marketisation - competing for academically more able students is of higher priority" (p. 116). The literature suggests the influence that politics have had on the curriculum has varied.

Sweeting and Morris (1995) identified two periods in which the curriculum was modified to meet socio-political needs: the earlier period (1945-82) was marked by the conscious pursuit of an apolitical school curriculum. “This involved avoidance of general political issues and of any attempt to develop a clear sense of local or Chinese national identity” (p. 163). In contrast, during the second (decolonisation) period, there was “a rapid rehabilitation of politics. School curricula have been amended to include political concerns and to develop the pupils’ sense of Chinese identity (ibid.)”. However, as none of the above studies included Chinese subjects such as Chinese language, Chinese literature, and Chinese History in their investigation, our understanding of the relationship between politics and cultural/national identity as manifested in the school curriculum remains incomplete.

There are, however, counter-arguments to the perspective that sees a rigid dichotomy between colonial education and the post-colonial era². Rather than imposing a cut-off in 1997, the curriculum transition period arising from the change in Hong Kong’s sovereignty should be seen as long. Choi (2003) criticised this misconception:

“Now, with the benefit of hindsight, one finds that in education, 1997 was not so much a watershed as a convenient scapegoat for a keen sense of uneasiness that had been brought about by change quite unrelated to the

² Post-colonial era means the period after the handover of sovereignty of Hong Kong from Britain to China.

political changeover” (pp.637).

Choi considered 1997 not a rigid watershed between a depoliticised and a politicised curriculum: Hong Kong’s postcolonial period, has been significantly more complicated than that of many other colonies, due to the signing of the Sino-British Joint Declaration in 1984, so that many of the education policies of the postcolonial period originated earlier.

Chan et al. (2005) acknowledge that the repeal of restrictive colonial education legislation in the 1990s had the effect in the post-handover period of giving teachers more freedom to innovate and meet the needs of students with a more varied and relevant curriculum. In education, managerialism and utilitarianism have already had a considerable impact, with reforms and policies being imposed, top-down, on schools and teachers, without prior consultation or participation on their part. This trend was, however, evident long before 1997. This is another example that demonstrates the fuzziness boundaries between different phases of education policy.

A further example is provided by the Education Commission Reports (see Table 3.1). Some of the reform initiatives proposed by the first post-colonial Hong Kong Chief Executive Tung, Chee Hwa were inherited from the British Colonial Government.

His policy on the medium of instruction in 2005, for example, was originated in *Education Commission Report No. Six* in 1995. This provides further evidence of education policy continuity between the colonial and HKSAR periods.

Period	Dates and titles of reports	Key concerns/role of EC
1984-86	No.1 (1984) ECR 1: No title No. 2 (1986) ECR 2: No title	Responding to the report of the visiting panel on proposals such as broadening the sixth form curriculum
1986-88	No.3 (1988) ECR 3: The Structure of Tertiary Education and the Future of Private Schools	Tackle universities over different student exit points
1988-92	No.4 (1999) ECR 4: The Curriculum and Behavioural Problems in Schools No 5 (1992) ECR 5: Teaching Profession	Initiate curriculum reforms; reduce the control and bureaucracy of the ED
1992-2000	No. 6 (1995) ECR 6: Enhancing Language Proficiency: A Comprehensive Review	Address language in education issues without major financial commitment. Ensure effective, efficient, and account delivery of education by schools
2000-	Review of Medium of Instruction for Secondary Schools and Secondary School Places Allocation (2005) Progress Report on the Education Reform (2002, 2003, 2004, 2006)	Serving as an advisory body

Table 3.1: Summary of Education Commission Reports (Source: Adamson et al., 2010:26)

The purposes of colonial rule were complex, and shifted over time, with different orientations in government and education policy: apoliticised policy in the earlier colonial period and more politicised policy in the later colonial and post-colonial periods. Moreover, education policies involve gradual rather than abrupt change from later colonial and post-colonial periods.

3.8 Local Level Factors

Local level factors refer to the roles played by various stakeholders and key players who shape decision making and implementation of the curriculum. The stakeholders or key players in shaping the curriculum history are often localised at the level of school or individual agencies, but they are not unimportant.

Lee and Dimmock (1999) identified the major stakeholders in curriculum decision making in Hong Kong as shown in Figure 3.1.

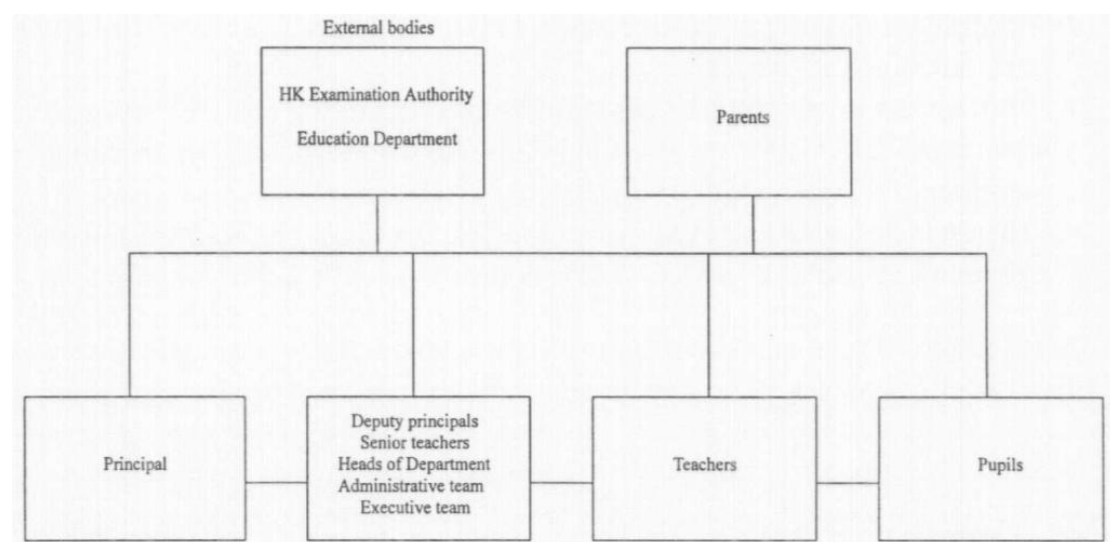


Figure 3.1 A Framework showing the Main Stakeholders in Curriculum Leadership and Management (Source: Lee and Dimmock, 1999:459)

The major stakeholders in curriculum decision-making in Hong Kong include external bodies such as the Education Department (now the Education Bureau), the Hong Kong Examinations Authority (now the Hong Kong Examinations and Assessment

Authority), school principals, middle managers (deputy principals, senior teachers/heads of departments and the administrative/executive team), teachers, parents, and pupils (ibid).

There are several reasons to include local level factors in the literature review. The main reason is the increasing need for the schools to make school-based decisions. Print (1993) suggested that the school curriculum is constantly subjected to considerable external pressure to change. Similarly, Marsh and Willis (2003) supported the idea that pressure for change and incentives to try out innovative practices might emanate from local perceptions and from newly proposed models. These pressures may contribute to curriculum change and hence press school practitioners to prepare for curriculum change at school level, particularly as school practitioners may be best located for understanding students' learning needs

.
Print (ibid) further argued that curriculum change is a subset of educational change and is affected by the same type of factors affecting change within education in general. School practitioners are generally regarded as the major curriculum decision makers at school level (Marsh and Willis, 2003). Leung (2001) suggested that curriculum decision-making may simply be taken as deliberations that help shape

decisions on what to teach, when to teach, and how to teach. As such, what shapes the decisions made by school practitioners regarding curriculum preparation is worth studying.

Under the new Education Reform in Hong Kong advocated in 2000, there were three phases of development (Short-term Phase: 2001-02 to 2005-06, Medium-term Phase: 2006-07 to 2010-11 and Long-term Phase, which is beyond 2011). Schools and teachers were encouraged “to adapt the central curriculum and develop their own school-based curriculum to help their students achieve the learning targets (knowledge, generic skills, values, and attitudes) through different measures, which include varying the organisation of content, contexts and examples, learning and teaching strategies, pace of learning and teaching, homework, criteria and modes of assessments” (CDC, 2000b:70). This means that schools and teachers should have some flexibility to organise and design the curriculum based on their own needs. With the implementation of the NSS academic structure beginning in September 2009, Liberal Studies became one of the four compulsory core subjects, along with Chinese, English, and Mathematics, accounting for no less than 10% of total lesson time in the overall three-year senior secondary curriculum (CDC and HKEAA, 2007). The importance of Liberal Studies has been enhanced under NSS.

Leung (1997) stressed that the ways “frontline key players interpret innovation is of paramount importance” (p.13). Following this line of thought, the perceptions of school practitioners on the Liberal Studies curriculum is vital in its shaping. The perceptions held by different school practitioners may differ, of course, and this may stretch to the actual implementation of the curriculum (Leung 2001).

3.8.1 Principals

Principals perform two essential roles in the curriculum: leadership and management (Lunenburg and Lunenburg, 2013). Ornstein and Hunkins (2004) pointed out that principals have long been looked upon as curriculum leaders in the school setting. Deal and Peterson (2010) affirmed that the school leader is key in shaping school culture and in turn the curriculum. They brought the insight of organisational theorists in school leadership to curriculum decision making, arguing that improvements in organisation characteristics improve the overall curriculum making of the school.

Yet, others, including Hord and Huling-Austin (1986), challenged the view of principals as leaders in curriculum decision-making. They suggested that principals are administrators (managers), working with materials, equipment, hiring, and scheduling rather than working in curriculum leadership. Principals, in actual practice, have been too busy with daily supervisory and administrative tasks, and hence most,

especially secondary school principals, have to rely on other staff members (teachers and supervisors) to plan, implement, and to evaluate the curriculum (Ornstein and Hunkins, 2004:26).

The literature gives no definite answer to whether principals should take up or have already taken up the role of curriculum leaders at the school level. Ornstein and Hunkins (2004) stressed that if curriculum planning (preparation) is to be successful, principals must have some form of involvement and exhibit some degree of commitment to the curricular effort. Principals' important role in setting the appropriate tone for curriculum change has long been recognised (Lippitt, 1967).

Principals may not view themselves as curriculum leaders at school level. Instead, they may perceive themselves as catalysts, facilitators, reviewers, and resource providers (Fullan 1981). Their role in reforming the curriculum depends in part how they envisage their level of involvement. Nevertheless, even if the time principals have spent or can spend on curriculum matters seems far too little, as long as they perceive curriculum preparation favourably and are willing to devote resources in this area, curriculum preparation can still work at school level. Ornstein and Hunkins (2004) suggested this is made possible because principals' responsibilities in

curriculum matters can be shared with other school practitioners. The concept of ‘empowerment’ implies in this context the delegation of jobs by principals (Tracy, 1990 and 2001). Leadership and management by principals are not two separate roles in relation to the curriculum but intertwined. Lunenburg and Lunenburg (2013) pointed out “management is a prerequisite to leadership.” (p.3) Good management of a school facilitates visionary leadership which in turn has a positive impact on school management. In this sense, the management role and curriculum leadership role are symbiotically related in promoting curriculum development.

Studies of the role of principals in Hong Kong were few in the early 1980s but increased in the 1990s (Lee and Dimmock, 1999). The qualitative research of Lee and Dimmock, with a case study of two primary schools, suggested that the curriculum is more subject- or content-based than a generic, principle-based set of activities. Curriculum leadership and management by Hong Kong principals did not typically show a whole school approach. Curriculum organisation was fragmented. This reflects the fact that Hong Kong principals were not used to playing the role of curriculum leadership in the early to mid-1990s.

In the late 1990s, Cheng (1997) concluded that it was necessary to change the model

of curriculum leadership by principals, stating,

“The challenges from the changing education environment, the implementation of educational reforms, and the pursuit of new school functions and effectiveness demand our school leaders to have a new set of leadership beliefs and competence that can transform the old and traditional constraints, facilitate education changes, and develop appropriate school environment for teachers and students to work, learn, and development effectively” (p.90).

This is compatible with the notion of transformational leadership developed from Leithwood’s research (e.g. Leithwood, 1994; Leithwood et al., 1999).

Transformational leadership requires three aspects in leadership by the principal, including setting directions, developing people and redesigning the organisation. (Yu and Jantzi, 2002). Yu and Jantzi (2002) summarised the above-mentioned three aspects as follows:

- *Setting directions includes building a shared vision, developing consensus about goals and priorities, and creating high performance expectations.*
- *Developing people includes providing individualized support, offering intellectual stimulation, and modelling important values and practices.*
- *Redesigning the organization includes building a collaborative culture, creating and maintaining shared decision-making structures and processes, and building relationships with parents and the wider community (p.373).*

The concept of transformational leadership is not only applicable to leading schools but also applies to the curriculum. With highly centralized curricula being

decentralised, the roles of principals should change accordingly (Cheng, 2009).

In Hong Kong, there were few training on the curriculum leadership of school principals before 2003 and the available organisation of trainings was piecemeal. Since 2003, however, EDB requires all aspiring principals of primary schools, secondary schools, special education schools and field studies centre to attend structured training including Need Analysis and Preparation for Principalship Course³.

With the satisfactory completion of both course programs and satisfactory submission of portfolio, EDB will issue the Certificate of Principalship to show the eligibility of the aspiring principals. Learning, teaching and curriculum is one of the six components of the Preparation for Principalship Course which covers curriculum development, curriculum reform, school-based curriculum and curriculum planning (EDB, 2018). This intends to increase the awareness of the role of principal in setting the direction of school curriculum development, though whether the policy will achieve the intended objective must be the subject of further studies.

³ The six modules of Preparation of Principalship Course include (1) Strategic Direction and Policy Environment Learning, (2) Teaching and Curriculum, (3) Teacher professional Growth and Development, (4) Staff and Resources Management, (5) Quality Assurance and Accountability and (6) External Communication and Connection to the Outside World (EDB, 2017).

3.8.2 Middle Managers

Middle managers are the people who have the day-to-day responsibility for managing departments or sections of a school, or for coordinating some form of activity or initiative, or for leading some form of staff team (Kemp and Nathan, 1989). They provide leadership, maintain morale, encourage staff development, and facilitate co-operation between staff (Jones et al., 1996). Siskin (1993) stressed their “*hermaphroditic roles* as neither fully teacher nor fully administrator, yet operating as a conduit for all tensions in the relationships between the two” (as cited in Brown, et al., 2000:240).

In the Hong Kong educational setting, middle managers include vice-principals, department heads, and panel heads. Middle managers usually work closely with the principals in making decisions concerning the school philosophies, policies, aims and objectives of the school curriculum (Leung, 2001). They are expected to analyse the current curriculum provisions, taking account of statutory requirements, staffing, organisation, and the needs of the school (Jones et al., 1996). Usually, they also act as the bridge between principals, managerial colleagues, and teachers.

The role of middle managers in curriculum matters is decisive (Leung, 2001). They

are regarded as front-line participants in curriculum matters and are expected to participate actively in the curriculum decision-making process (Holt, 1981). They are both the initiators and facilitators of curriculum matters (ibid), providing their colleagues with vision, commitment to a set of values, guidance, inspiration, and support (Jones et al., 1996; Leung, 2001).

In a study undertaken by Young (1977) regarding curriculum decision-making preferences among school personnel in Atlanta Georgia, it was found that middle managers were more attracted to participation in curriculum decision-making than were teachers, even if that meant they would be further removed from the exigencies of classroom life. They expected genuine deliberation and participation in the curriculum decision-making process, instead of having their time wasted in pseudo-discussion and cosmetic consultation, when decisions had already been made and were unlikely to be modified (Earley and Fletcher-Campbell, 1989). Middle managers are therefore more likely to perceive curriculum preparation favourably.

3.8.3 Teachers

Marsh and Willis (2003) suggested that teachers are the major participants in curriculum planning in schools. Experienced teachers have a broad and deep

understanding of learning and teaching, in the areas of content, methods, teaching materials, and the needs and interests of students. (Ornstein and Hunkins, 2004:25).

Teachers, whether veterans or novices, are generally regarded as the final planners of the curriculum, as they are the ones who enact the formal curriculum in the classroom (Marsh and Willis, 2003). They are therefore believed to be in the best position to make appropriate curriculum decisions for the benefit of students' effective learning.

Some have pointed out that teachers' willingness to participate in curriculum matters indicates that teachers are keen to embrace greater participation in curriculum decision-making (Young, 1979 and 1989; Johnston, 1990; Savery *et al.*, 1992; Martin-Kniep and Uhrmacher, 1992). Yet, other studies have shown that not all teachers find participation attractive, particularly where the workload is concerned.

“Some teachers even refuse to participate in curriculum matters beyond classroom level. They prefer to work solely at an instructional level within the classrooms. This may be partly due to the schools' failure to get teachers involved in the first place.” (Hanson, 2001:252-253)

Evidence shows that there are various factors affecting teachers' attitudes towards curriculum participation. The factors may be the kinds of decision that are being made, the amount of expertise they need to bring to the process, and the degree to which they are required to participate (Mohrman *et al.*, 1978; Hoy and Miskel, 1978).

Hanson (2001) pointed out that some teachers are classroom-bound. Similarly, Young (1977) found that most teachers preferred the kind of curriculum decision-making that was directly applicable to their classrooms. Marsh and Willis (2003) suggest teachers are generally more interested in deciding how, rather than what curriculum, to teach.

In preparing to teach curriculum, teachers are required to make judgments and decisions. Marsh and Willis (2003) pointed out that it is far from clear whether their decisions are based on some explicit value-orientation or on some combination of intuition and previous experience. Yet, the belief systems of teachers, particularly their beliefs about curriculum change and preparation, may have a great effect on the curriculum decisions made. Tillema and Gert (2006) contended that all teachers need opportunities to explicitly discuss, elaborate, and construct their own beliefs.

Hui (2003) added that teachers' perception of the working culture of schools is also influential. Their perception may highly affect their contribution to and the effort they put into curriculum preparation. Hargreaves (1994) identified four dominant forms of school working culture - individualism, balkanisation, collaborative culture, and contrived collegiality. Among the four types of cultures, collaborative culture is the most conducive to school-based curriculum development and probably to the success

of curriculum implementation.

The collective expertise and endeavours of the teaching community are highly appreciated in this working culture. Yet, Hui (2003) raised the point that this culture may not occur easily and may even take the form of contrived collegiality where teachers involved in curriculum preparation just carry out the decisions determined by their superiors.

In the introduction of NSS LS, teachers are required to implement pedagogic innovations developed by external agents who may or may not be familiar with the teachers' viewpoints or the specific classroom context in which the innovation is to be implemented. If teachers' views are not sufficiently considered, it may exacerbate the already challenging nature of implementing something new (Carless, 2003).

Teacher commitment is upset if teachers are not fully informed and consulted when a new curriculum is introduced. Teacher commitment has been defined as "... the degree of psychological attachment to the teaching profession" (Choi and Tang, 2009: 767). The crisis of teacher commitment due to massive system-wide education reforms and restructuring has been well documented in the literature. The teachers

may have different levels of commitment (Day and Gu, 2007; Huberman et al., 1997).

The study by Choi and Tang (2009), however, did not affirm the negative impact of education reforms on teacher commitment. Rapport with students and a sense of personal fulfilment in teaching seem to provide essential energy to the teaching profession.

3.8.4 Students

A curriculum is concerned with the provision of programmes for students (Ornstein and Hunkins, 2004). Similarly, other educators, deeply influenced by John Dewey, have suggested the curriculum is centred in learners; its emphasis is upon the pupils and only indirectly and secondarily upon subjects. Also, whatever is taught must be understood by the students and be vitally related to the achievement of educational purposes.

A curriculum has therefore to be designed in such a way as to contribute to learners' productive learning and to bring out the most benefit to learners (ibid). Meeting students' learning needs would then be a perennial challenge. Therefore, the study of the students' characteristics may contribute to what and how curriculum preparation should be or has been done.

So far, secondary school students have rarely played any role in shaping the curriculum. The questions of what and how to teach are still the professional decisions of middle managers or teachers, based on their understanding of the nature, needs, and ability of students.

3.8.5 Parents

The influence of parents on school curriculum is less direct but is gaining importance due to the formation of parent-teacher associations, the involvement of parent representatives in the incorporated management committees of schools. A large middle class has emerged since 1970s due to the rapid economic development of Hong Kong. Middle class parents usually have high expectation of their children's academic and non-academic performance.

Morris (1995) argued that the existence of an ethnically and culturally homogeneous population in Hong Kong has given rise to a curriculum that has minimal emphasis on social efficiency and reconstruction.

“In terms of the structure of society, the emergence of a large middle class since [the] 1970s ... [has meant that] parents are more concerned with their children's education ... [and adhere to a] neo-Confucianism that places values on diligence, a focus on achievement, self-reliance, competition, and the promotion of communal over individual interests ... In some sense the highly competitive, academically oriented curriculum of Hong Kong schools has reflected and reinforced those values... ” (p.131).

In East Asia, for example, tutoring is more likely to be received by pupils who are already performing well but whose families wish to maintain or further enhance their performance in the competitive society (see e.g. Bray and Kwo 2003; Bray 2009; Dawson 2010). Learners receiving such ‘shadow education’ are usually from high socio-economic groups in countries with examination-oriented and over-loaded curricula (Bray, 2011). Such modern-day parents still cannot envisage managing without private tutoring for their children, given the current memorisation and examination-oriented culture. In other words, parents still believe in drilling and practice for public examination.

In facing the keen competition of students’ enrolment, without doubt, schools must consider the need of the parents. This inevitably affects the curricula of schools.

3.9 Chapter Summary

This chapter has reviewed the main literature investigating the factors shaping curriculum history of Hong Kong on three levels: international, regional, and the local level. The factors in the three levels have been explored separately in this chapter for clarity; however, in practice, the factors are usually interwoven. I shall illustrate the complexity of factors shaping Liberal Studies in subsequent chapters.

Chapter Four: Research Methods

4.1 Introduction

This chapter describes and justifies the philosophy, approaches, and research strategies. The research questions (See Table 4.1) are embedded in a historical study using a qualitative research approach to investigate and understand the interwoven factors shaping the history of Liberal Studies in Hong Kong. The main aim of this chapter is to show how the research methods tackle the research questions and sub-questions.

Documentary analysis and oral history are employed. The documentary analysis is used to provide a comprehensive account of policy making and the formation of Liberal Studies; it functions as the main research method. Oral history is used to supplement the documentary analysis, enriching it with insights into the enacted curriculum.

This research adopts a qualitative research approach. The end-product is the result of process-oriented research, based on multiple sources (documents and oral testimony). This is subjective but scientific (Gay, 2000). Cohen et al (2003:12) shared same thought by stating, “Social science is a subjective rather than objective undertaking, as a means of dealing with the direct experience of people in specific contexts”. Moreover, Geertz (1973) asserted that ‘thick descriptions’ are essential to penetrate

into situations that are not available in quantitative approaches. The qualitative approach in this thesis provides richer, fuller, and a more in-depth data, giving greater insight into the subtle nuances of the research participants.

This chapter is divided into four parts. Many historians argue the importance and existence of a philosophy, or *a priori* ideas, before the research. Following this line of thought, in the first section, I explain my approach to establish my philosophy and *a priori* ideas. The subsequent three parts present the concrete research methodology, including data collection and analysis, trustworthiness of this research, and the limitations of the research methodology.

4.2 Philosophy of the Research Approach

Education researchers and historians of education generally believe in the importance of a philosophy and *a priori* ideas (Smeyers, 2008; Smeyers and Depaepe, 2008) in relation to historical research. In other words, it is fair to say that historians usually have preconceptions about history. Bridges and Smith (2006:131) also echo the importance of the existence of a philosophy of historical research, stating, “philosophical reflection and argumentation are central features of the methods and procedures of educational research”.

Referring to the discussion in the Chapter two literature review, Liberal Studies is a unique subject in Hong Kong. So far, there has been little research output on this subject, especially on the history of the curriculum. It is hard to find a philosophy and *a priori* ideas from previous studies. My *a priori* ideas are borrowed from research into the history of other subject curricula in Hong Kong. As mentioned in Chapter 3, international, regional and local level factors shaped the history of Liberal Studies.

4.3 Research Questions and Sub-Questions

In the introduction to Chapter one, key questions and sub-questions were stated. In this section, I shall explain the ways in which the key questions and sub-questions are addressed. A method table (Table 4.1) is presented to show how the research questions are tackled. The respective analysis methods are then described and explained.

Research Questions	Research Sub-questions	Description of research tools
How did Liberal Studies evolve over time?	How did ASL LS evolve over time? How did NSS LS evolve over time?	• Content and comparative analysis of CDC and HKEA/HKEAA published documents and examination paper • Content analysis of the publications by the Education Commission • Oral history of key Liberal Studies curriculum players
What were the factors shaping the Liberal Studies curriculum over time?	The main questions are answered in three overlapping phases: • ASL LS (1992-2012) • NSS LS before the Umbrella Movement (2009-August 2014) • NSS LS during the Umbrella Movement (September-December 2014)	• Content analysis of Legco Proceedings (Hansards) • Oral history of key Liberal Studies curriculum players

Table 4.1: Method Table of Research Questions and Research Sub-questions

Table 4.1 recaps the two research questions. As stated in chapter two, there are two Liberal Studies curricula, ASL LS and NSS LS. As a result, two sub-questions are set out for the first question to trace the evolution of the Liberal Studies curricula.

The first key question and sub-questions are shown below:

Research question 1: How did the history of Liberal Studies evolve over time?

(a) How did the history of ASL LS evolve over time?

(b) How did the history of NSS LS evolve over time?

The discussion is divided into three overlapping phases that include ASL LS (1992-2012), NSS LS (2004-August 2014) and NSS LS (September 2014-December

2014). Overlapping phases are encountered because part of ASL LS and NSS LS was offered in a double cohort from 2009 to 2012. The 2004 to 2009 preparation phase of NSS LS coincided with the already-implemented ASL LS. The additional short but crucial phase from September to December 2014 of NSS LS can be explained by the occurrence of the Umbrella Movement in Hong Kong.

Research Question 2: What were the factors shaping the Liberal Studies curricula over time?

The first research question generates a narrative discussion on the history of Liberal Studies. This narration builds up the foundation for in-depth study of the factors affecting the history of Liberal Studies.

4.4 Data Collection and Analysis

Documentary analysis and oral history are the two main research tools used. As mentioned, documentary analysis is used to analyse policy decision-making and policy formation, whilst oral history provides supplementary insights into policy implementation. In this section, I shall explain how the data are collected and analysed.

4.4.1 Documentary Analysis

The history of education has traditionally been closely attuned to documentary methods (Gardner, 2003). In the historical research of education, published documents and archives available to the public are fundamental sources of historical data; usually in written and printed format. Likewise, documents such as working reports, curriculum and assessment guides, public examination papers (ASL LS and NSS LS), newspapers, and Legco proceedings are imperative sources in examining the history of Liberal Studies.

Documentary sources are very important assets in contemporary qualitative research in the academic field. Firstly, these sources are immediately available, and the materials are generally easily accessible. Secondly, for some research problems, documents are the only sources of data; and finally, it is cost effective and time-saving. There is little likelihood of any ethical problems arising from the use of documentary data obtained from these sources (Green and Thoragood, 2009). In this section, I explain how I collected and analysed these data.

Several stages were involved in collecting the documents. The first stage was to establish the document's authenticity. This means the evidence derived is "genuine

and of unquestionable origin” (Scott, 1990:6). When the authenticity of a document has been established to the researcher’s satisfaction, the next stage is to appraise its reliability, that is, how far its account can be relied upon. This includes issues relating to truth and bias, but also the availability of relevant source material and the representativeness of those documents that have survived to be researched. Documents with bias are certainly not to be ignored. The understanding of bias gives the researcher a significant clue to the issues being studied (McCulloch, 2004).

The search for documentary evidence can be endless and the effectiveness of research documents is subject to the law of diminishing marginal returns. Hence, Elton suggests the general principle of ‘controlled selection’ (Elton, 1967:92); that is, in the process of data collection, not to deliberately include too many sources nor select documents merely based on how well they support one’s own views or hypotheses (Kan, 2002).

The following documentary sources are adopted in this research, and in this sub-section, I explain the general content of the documentary sources listed below, including the ways the following documentary sources tackle the research questions and sub-questions.

Government-published reports, as shown in Tables 4.2 and 4.3, include official consultation reports, the curriculum and assessment guide and syllabus published by the Education Commission, Education Department, EMB, EDB, HKEA and HKEAA in this study. The reports were issued by government or public organisations. Therefore, it is reasonable to assume that they exhibit a high degree of authenticity although, their nature, origin and meaning must still be interpreted critically.

Reports on the background of Liberal Studies are shown in Table 4.2. They are useful in understanding the curriculum background. The curriculum and assessment guide and curriculum consultation documents, as tabulated in Table 4.3, detail the changing curriculum content. Both types of documents provide important clues for the first research question “How did the history of Liberal Studies evolve over time?” and the two sub-questions.

The Visiting Panel Report, Education Commission Reports and some CDC reports are essential documents describing the overarching background of Hong Kong education. In order to gather background related to Liberal Studies, I reviewed the table of content of all reports published during the study period. As a result, the

reports listed in Table 4.2 present relevant background on the development of Liberal Studies. Taking *Education Commission Report No.2* as an example, there are twelve chapters with 214 pages: however, only Chapter VI – “The Development of Sixth Form Education” is closely related to Liberal Studies. The subsections sixth form curriculum and I level curriculum⁴ also provide data for the description and analysis in the thesis. Appendix 4.1 shows an example of the data retrieved from the document. The data acquisition processes were also applicable to background data of Liberal Studies.

The content of the Liberal Studies curricula can be found in the Syllabus in ASL LS and Curriculum and Assessment Guide in NSS LS. The components of Syllabus and Curriculum and Assessment Guide include questions for enquiry and explanatory notes to explain the key concepts underpinned. The similarities and differences could be compared to understand the development of Liberal Studies.

⁴ ASL curriculum was formerly called I level curriculum which was equal to half subject of Advanced Level.

Curriculum Development Council (2002). Basic Education Curriculum Guide: Building Strengths, Hong Kong: Government Printer.
Education Commission (1986). Education Commission Report No.2, Hong Kong: Government Printer.
Education Commission (1988). Education Commission Report No.3: The Structure of Tertiary Education and the Future of Private Schools, Hong Kong: Government Printer.
Education Commission (1995). Education Commission Report No.6: Enhancing Language Proficiency: A Comprehensive Strategy, Hong Kong: Government Printer.
Education Commission (2000). Learning for Life, Learning through Life: Reform Proposals for the Education System in Hong Kong, Hong Kong: Government Printer.
Education Department (1989). Report of the Working Group on Sixth Form Education. Hong Kong: Government Printer.

Table 4.2 List of Government Published Reports Used in Documentary Analysis – Background

Hong Kong Examinations Authority (1990). Hong Kong Liberal Studies: Draft for 2 nd Consultation, Hong Kong: Government Printer.
Curriculum Development Council (2000). Syllabuses for Secondary Schools Liberal Studies (Advanced Supplementary Level), Hong Kong: Government Printer.
Curriculum Development Council and Hong Kong Examination and Assessment Authority (2004). Proposed New Senior Secondary Curriculum and Assessment Framework Liberal Studies: 1 st Draft (for consultation), Hong Kong: Government Printer.
Curriculum Development Council and Hong Kong Examination and Assessment Authority (2005). Proposed New Senior Secondary Curriculum and Assessment Framework Liberal Studies: 2 nd Draft (for consultation), Hong Kong: Government Printer.
Curriculum Development Council and Hong Kong Examination and Assessment Authority (2007). LS Curriculum and Assessment Guide, Hong Kong: Government Printer.

Table 4.3 List of Government Published Reports Adopted in Documentary Analysis – Curriculum and Syllabus Content

The comparative approach was adopted to compare and contrast the salient backgrounds of ASL LS and NSS LS. One of the major benefits to be gained from cultivating a comparative approach to the history of education is “to establish detailed insight into comparisons and contrasts in our education past” (Crook and McCulloch, 2002:397).

In this research, through the comparative approach, systematic comparisons and contrasts have generated a pattern and revealed the salient features of the history of Liberal Studies. This pattern and features are useful for theory building, deductive reasoning, and hypothesis testing, partly because they may not conform to our schema and thus present a paradox (Bray, 1997). This research also seeks to understand the schema and to assimilate such paradoxes.

The second type of document adapted for analysis is Legco Electronic Records, obtained from the Legco library website:

http://www.legco.gov.hk/general/english/library/search_records_collection.html

Five types of Legco Electronic Records are classified according to the Legco Library. Their meanings are explained in Table 4.4.

Categories	Meanings
Official Record of Proceedings (Hansard)	Record the whole process of Legislative Council meetings (by word to word transcription in both Chinese and English)
Panel of Education	Includes the agenda, minutes and follow-up actions by the Panel of Education
Other Panels ⁵	Records other than those from the Panel of Education (but some of them may relate to Liberal Studies)
Written request	Written questions related to Liberal Studies from Legislative Council members (the questions are not debated in the Legislative Council)
Paper	Government papers related to Liberal Studies presented at Legislative Council meetings.

Table 4.4 Categories of Legislative Council Documents (Website of Legislative Council Library – accessed on 30 June 2016)

The complete data acquisition process is shown in Figure 4.1. The key phrase, “liberal studies”, was entered into the Legco library website search engine. By using the search term, “liberal studies”, with double quotation marks, the search engine retrieved only those records with the complete phrase, “liberal studies” (Step 1). Using quotation marks in the search ensured that the concept was searched for as a whole and not picked apart by the search engine to show separate records with only “liberal” or “studies” or records with “liberal” or “studies” in different lines within the same record. Legco Electronic Records entered into the database on or before 31 December 2014 were studied. 648 records were retrieved (Step 2).

⁵ The committees that monitor and examine policy issues are called panels. There are currently 18 panels, whose formation and terms of reference were approved by the Council on the recommendation of the House Committee. <http://www.legco.gov.hk/general/english/committ/comm1620.htm> accessed on 31 May 2017

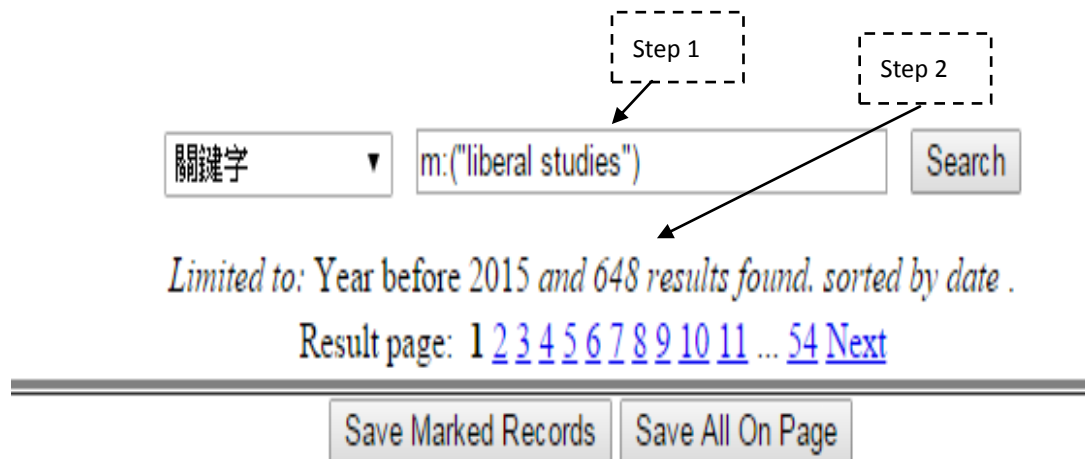


Figure 4.1 How the Boolean Search for “Liberal Studies” was Conducted

The record of documents is defined as any item of Hansard/Panel of Education/Other Panel/Written Request/Paper containing the term, ‘Liberal Studies’. However, not all records were relevant to the research questions and research sub-questions. All 648 documents were reviewed and interpreted to determine whether they should be included in the study, and the criteria were pre-set by the researcher in line with the second research question of the thesis, that is, to evaluate the factors shaping the history of Liberal Studies. Two cases can be given to illustrate the criteria of inclusion of “Liberal Studies” records.

Case 1:

“**MR PATRICK LAU** (in Cantonese): Madam President, I support the motion and the amendments proposed by Members.

Here, I must express my expectations of the new Chief Executive in respect of the education policy. The training of talents is an area of work that absolutely cannot be taken lightly in any country. All sectors of the community already understand the importance of innovative teaching approaches and *Liberal Studies*, and the Government is also implementing education reforms in this direction gradually.”

(Hansards, 22 June 2005)

Case 1 includes the phrase “Liberal Studies”. The speech was delivered by Legislative Councillor Mr. Patrick Lau for his support of Liberal Studies. His speech only showed his attitude of Liberal Studies but did not reveal the factors shaping Liberal Studies. Hence, this record was discarded for the purposes of deeper analysis.

Case 2:

New senior secondary curriculum

Liberal Studies

“Members, in general, expressed support for the implementation of the 334 structure with three-year junior secondary and three-year senior secondary education linking to four-year undergraduate university programmes. They, however, were concerned about the new senior secondary (NSS) curriculum, in particular about the curriculum design, assessment, pedagogies, and class size for teaching *Liberal Studies* which would be one of the four core subjects at senior secondary levels. Members considered that *Liberal Studies* should only be included as a core subject when sufficient experienced teachers were available, and

appropriate pedagogies, assessment mechanisms, and support measures had been put in place. According to a survey conducted by a political party, teachers, in general, considered that the Education and Manpower Bureau (EMB) had not provided sufficient professional development and support to teachers to teach *Liberal Studies*. Members suggested that the Administration should allow schools to teach *Liberal Studies* in small classes.

The Administration pointed out that the phrase *Liberal Studies* was currently taught at the Advanced Supplementary Level. Good practices developed and experiences gained from teaching *Liberal Studies*, Integrated Humanities, and Science and Technology under the existing curriculum would be used to support schools which had little experience in teaching the subject. Schools were encouraged to start teaching Integrated Humanities and Science and Technology in senior secondary classes so that their teachers could start teaching topics covered by *Liberal Studies* at an early opportunity. A web-based resource platform was launched in mid-2005 to provide the basic knowledge which underpinned the *Liberal Studies* curriculum for teachers' reference. An association of *Liberal Studies* teachers, comprising some 300 serving teachers with experience in teaching *Liberal Studies*, had been established to form professional networks. Professional development programmes for serving teachers who would teach *Liberal Studies* would be progressively implemented over a period of three years...”

(Panel on Education Updated background brief prepared by the Legislative Council Secretariat for the special meeting on 25 May 2007)

Case 2 presents a case with numerous appearances of the phrase Liberal Studies. I would include this record for analysis because the factors considered by Legislative Councillors and government regarding the different pace of development of Liberal Studies. This fulfils the purpose of research question two, i.e., to examine the factors shaping Liberal Studies. Given the criteria used and screening the 648 records, 299 records were selected for further investigation.

There are several advantages to using Legco Electronic Records. The documents are open to the public and are easily accessible as PDF or Word documents. In addition, the official reports and summaries show government attitudes towards Liberal Studies. Hansard is formal and contains the verbatim records of the speeches of Legislative Councillors. They are a rich source of information for understanding the different viewpoints of Legislative Councillors on controversial issues and they provide clues to trace the changing government policy and public interest in Liberal Studies (Legco, 2016).

The third type of document used is the examination papers issued by HKEA or HKEAA. The ASL LS papers from 1993 to 2012 and the practice papers and live NSS LS papers were closely examined to trace the evolution of the Liberal Studies curriculum from the angle of assessment. I conducted a general trend analysis of the examination papers but did not find discernible pattern. Nevertheless, some questions set aroused public concern which yielded interesting findings that may facilitate the understanding of the research question and sub-questions regarding the history of Liberal Studies.

Lastly, newspapers are a possible source of information on the social, economic, and

political background against which the two Liberal Studies curricula have been constructed. They provide pertinent information that a historian of education should explore. Franklin (1999) commented curriculum, as a social construct, is changing with time.

“Rather, they are continually changing bodies of knowledge, skills, and beliefs reflecting the diverse interests of sub-grounds and alliances among educators, which themselves are frequently shifting over time” (p.461).

Therefore, I used Wisenews, a website offering a searchable database of current and previously published newspapers, which helped search the relevant newspapers for information on the history of the development of Liberal Studies. Wisenews accesses most newspapers in Hong Kong and can trace previously published newspapers back to 1990. Although newspapers are useful data sources for information on the social, economic, and political backgrounds, they are of course subject to journalistic bias. Newspapers, in this study, serve as supplementary data sources to Hansard and oral history.

4.4.2 Oral History

Oral history interviews can be an important tool in more recent historical research and are used to supplement the main documentary sources in this study. The main driving force in education policy making during the period under consideration in this thesis was the Education Commission before 1997 and in Executive Council

thereafter. Liberal Studies becomes a politicised and sensitive subject with the onset of the Umbrella Movement – which was when most of the interviews were conducted. A limitation of this study arises from the difficulty experienced in securing interviews with high-level policy makers; interviewees' insights are principally related to policy implementation. Nonetheless, the oral history gives us important perspectives on Liberal Studies in Hong Kong.

Oral history is a process of communication or interaction in which the informant gives the needed information or data verbally in a face-to-face situation (Koul, 1997). It allows both parties to explore the meaning of the questions and answers involved and gives rapid and immediate responses (Brenner et al., 1985).

Interviews can be classified into individual interviews and focus group interviews, according to the number of informants. Interviews can be either formal or informal. In the structure of question-setting, there are open-ended, semi-structured, or structured questions (Patton, 1990). In this research, individual, formal, and semi-structured interviews were conducted with seven informants. In the following section the informants chosen, data collection, data analysis, and the merits and demerits of using interviews are examined.

Purposive sampling was adopted to select informants who were active players in Liberal Studies. The rationale for selection is two-fold. First, the informants were either responsible for ASL LS or NSS LS, or both. I aimed at ensuring more complete coverage of informants in the two Liberal Studies curricula. Second, they fell into a hierarchical niche of curriculum players such as former curriculum

developers from the government, and frontline workers in universities and secondary schools. This enabled the history of Liberal Studies to be understood in a more comprehensive perspective. Table 4.5 shows the information of seven informants, their details and criteria used.

Interview Date	Pseudonym	Details of Informant	Criteria
12-12-2014	Levin	Experienced vice principal of a school with English as a medium of instruction Head of the school's Academic Committee	Middle manager of school curriculum NSS LS teacher
19-12-2014	Elaine	Liberal Studies teacher trainer in a university programme	Liberal Studies university lecturer (with education training)
20-12-2014	David	Senior teacher in university Pioneer in assisting Education Department to introduce ASL LS Examiner and moderator of HKEA and HKEAA ASL LS public examinations	Liberal Studies university lecturer Profound experience in drafting ASL LS syllabus and examiner of ASL LS
25-12-2014	Nancy	Liberal Studies Panel Head in a school with English as a medium of instruction Work closely with Education Bureau to share experience in teachers' training	Liberal Studies middle manager (NSS LS) NSS LS teacher
31-1-2015	Thomas	Principal of an aided school Prior to the appointment as a principal, he worked as a senior officer of Curriculum Development Institute in the Education Bureau	Principal of an aid secondary school who worked for the government in curriculum development of Liberal Studies
5-2-2015	Karst	Liberal Studies teacher trainer in a university programme and teachers' trainer of Education Bureau	Liberal Studies university lecturer (with sociology training)
12-2-2015	Wayne	Experienced retired senior officer of Curriculum Development Institute who developed both ASL LS and NSS LS He is now working as a Liberal Studies education consultant for school support.	Curriculum developer of both ASL LS and NSS LS

Table 4.5 List of Informants of Oral History (in chronological order of interview dates)

This research received research ethical approval from the University of Nottingham (Appendix 4.2). In the light of the approval, invitations were sent to fourteen key

Liberal Studies curriculum players, of whom seven agreed to take part in the interviews. The informants completed the consent forms of interview (Appendix 4.3), and one informant agreed to be fully identified. For consistency and privacy, however, pseudonyms are used for all informants throughout this thesis. As all informants are adults and willing to participate in the interviews, the ethical risk is low. The interviews were successfully conducted and the details of seven interviews are tabulated in Table 4.5.

The other seven Liberal Studies curriculum players (who declined or ignored my invitations) included members of the Liberal Studies subject committee, officials of EDB and HKEAA and the student leaders of the Umbrella Movement. Research without their participation was clearly less comprehensive. However, the decision to decline or ignore an invitation to be interviewed may itself be interpreted as conveying meaning; although, of course, this needs to be done with care.

The main principle in designing interview questions is to generate constructive answers from informants to the research questions. As the oral history took the form of semi-structured interviews, common interview questions were asked in the interviews (Appendix 4.4). Specific questions were then asked based on the roles of informants in the Liberal Studies curriculum and follow-up questions were asked based on their replies.

In order to construct fruitful outcome of the interviews, informants have to know the goal of the study. (Brenner et al., 1985) The common interview questions were sent to them before the interviews. As a result, the informants had better preparation of the interviews.

Schwartz and Jacobs (1979) shared the importance of feeling of informants but also emphasised the content of their conversation. Interviews have particular strengths. An interview is a useful way to collect large amounts of data quickly.

“When interviewing is used to reconstruct the reality of a social group, individual respondents are treated as sources of ‘general’ information. That is, they are asked to speak on behalf of people other than themselves and to give information about social processes and cultural conventions that transcend their own personal lives. In an interview setting... the researcher asks directly about general issues or he interprets individuals’ responses in such a way as to throw light on general attitudes, situations and patterns” (p.38).

Qualitative researchers typically rely quite extensively on in-depth interviewing or vertical analysis (Smeyers, 2008). Kahn and Cannell (1957:149) describe interviewing as “a conversation with a purpose”; it may be the overall strategy or one of several methods employed in a study. Interviewing varies in terms of *a priori* structure and in the latitude the interviewee has in responding to the research questions.

As suggested by Fine and Sandstrom (1988:17), the interviewer should adopt the role

of being a friend to interviewees during an interview. This approach offers more fruitful results, as the interviewer interacts with the interviewees “in the most trusted way possible”.

As such, during the interview, the following points were borne in mind:

- *listen more and talk less;*
- *follow up on what informants say and ask questions when confused or do not understand;*
- *paraphrasing what the informants had spoken;*
- *avoid leading questions and ask mainly open-questions;*
- *do not interrupt in any circumstance;*
- *keep informants focused and ask for concrete details, especially when the informants misunderstand the questions;*
- *be prepared and ready to ask the same question in different ways (rephrase the question) when the informants show that they are unclear about the question;*
- *maintain a neutral attitude and do not make any judgement about informants' view and beliefs;*
- *do not debate with informants over their responses; and*
- *allow sufficient time to answer the questions.*

(Koul, 1997:177 and Gay and Airasian, 2000:223)

The interviews were audio-taped. Only Cantonese and English speakers were involved in the interviews. The interviews held in Cantonese were transcribed and translated into English. For English speakers, the scripts were directly transcribed.

The data transcription and translation was carried out by me. Direct quotation is the main method of transcription. In order to ensure consistency and validity of the transcription, the transcripts were given to the informants to check, and correct for

accuracy.

The next step was to analyse the data. Interpretative analysis was adopted in this study. Gall et al. (1999) explained that interpretative analysis involves a systematic set of procedures to code and classify qualitative data to ensure that the important constructs, themes and pattern emerge. The steps of interpretational analysis include:

- *“Preparing a database containing all the data (documents and transcripts in this study)*
- *Numbering each paragraph or line of text sequentially and then dividing the text into meaningful segments;*
- *Developing meaningful categories to code the data;*
- *Coding each segment by any and all categories that apply to it;*
- *Cumulating all the segments that have been coded by given category; and*
- *Generating constructs that emerge from the categories.” (p.298)*

Among various qualitative techniques, content analysis is used for making replicable and valid inference from texts to the context of their use (Krippendorff, 2004:18). It involves subjective but scientific interpretation of the content of the text data through a systematic classification process of coding and identifying themes or patterns (Hsieh and Shannon, 2005). Unlike quantitative content analysis, which produces counts and statistical inference, qualitative content analysis aims at identifying patterns, themes, and categories. The process is designed to condense raw data into categories or themes based on inference and interpretation.

Based on the patterns, themes and categories derived from the comparative approach and qualitative content analysis, cause and effect relationships between the history of Liberal Studies as a dependent variable and factors affecting the history as independent variables are explored.

Arksey and Knight (1999:141) note that transcripts “only capture the spoken aspects of the interview, missing the setting, context, body language and feel”. The guidelines of interviews by Koul (1997) and Gay and Airasian (2000) helped focus on the setting, context, body language and feel. During transcription, I also paid attention to the tone of speaking, and to pauses, to identify the speakers’ ‘true meaning’.

Like other research tools, the interview has its limitations. Interviews involve personal interaction; cooperation of informants is essential. Interviewees may be unwilling to share what the interviewer wants to explore, or they may not be aware of recurring patterns in their answers. In addition, a semi-structured interview easily prompts new questions that may yield contradictory feedback, increasing the difficulties of data analysis, but arguably enriching the data.

For example, informants were asked to reflect on whether Liberal Studies in Hong Kong was a controversial matter of public debate, I believe it was. Most informants

agreed with my belief. However, one of them disagreed. Further questions were prompted in the interviews to solicit his counter-arguments. First, in what ways do you define a rich curriculum? Second, the Liberal Studies especially NSS LS was controversial, why do you think that it was not rich curriculum in terms of controversy? The contradictory feedback enriched the comprehensiveness of the findings by channelling me to think in another perspective.

4.5 Trustworthiness of Research

The trustworthiness of research refers to validity and reliability. However, since the ideas of validity and reliability are rooted in quantitative research, they should be understood in a naturalistic approach, this being the main paradigm of qualitative research (Golafshani, 2003). Lincoln and Guba (1985) argued that sustaining the trustworthiness of research depends on the issues in the study. The idea of discovering truth through measures of reliability and validity is replaced by the idea of trustworthiness, which is “defensible” and establishes confidence in the findings (Lincoln and Guba, 1985).

To widen the spectrum of conceptualisation of reliability and to reveal the congruence of reliability and validity in qualitative research, Lincoln and Guba (1985) state that since there can be no validity without reliability, a demonstration of the former (validity) is sufficient to lay claim to the latter (reliability). If the issues of reliability, validity, trustworthiness, quality, and rigour are used for differentiating “good” from “bad” research, then testing and increasing the reliability, validity,

trustworthiness, quality, and rigour will be important to the research in any paradigm.

Triangulation is an often-used strategy to enhance the trustworthiness of qualitative research. Cohen et al. (2003: 233) defined triangulation as, “the use of two or more methods of data collection in the study of some aspect of human behaviour”. Denzin (1997), Keeves and Sowden (1997) and National Research Council (2002) have asserted that triangulation involves a range of procedures that the researcher can use to increase the strength and validity of the data obtained and to overcome the weaknesses or biases of using a single method.

Keeves and Sowden (1997) suggested there are four main types of triangulation to serve the aforementioned purposes:

- (i) Methodological triangulation, which involves the use of more than one method to obtain evidence;
- (ii) Theory triangulation, which involves the use of more than one theoretical perspective in the interpretation of phenomena;
- (iii) Investigator triangulation, which involves the use of more than one researcher; and
- (iv) Data triangulation, which involves replication of the investigation in time, in

location or with another sample of informants.

The triangulation procedure adopted in this research is “methodological triangulation”. Because of time and manpower constraints, it was impossible for the researcher to use all the four methods together. Both “between methods triangulation” and “within methods triangulation” are employed in the present study in order to reduce bias in the research (Smith, 1975).

However, when using the methodological triangulation, the researcher has to bear in mind that different methods may not necessarily provide a coherent picture (Denzin, 1997). Instead, different pictures may emerge; careful and critical interpretation of the findings is therefore essential.

The oral history and documentary analysis helped in checking the accuracy of the data between the methods. The researcher transcribed all interviews. The transcription process, to a certain extent, was subjective. Powney and Watts (1987:147) shared the same viewpoint, stating, “*any transcription is an interpretation by the transcriber of what is being said. What is written down is inevitably selective*”. Therefore, using different types of documents, and different informants in the oral history yielded

“within methods” triangulation check for trustworthiness of the research.

4.6 Ethical Considerations in this Research

Ethical issues are prime concern in the oral history of this research. As mentioned in 4.4.1, University’s consensus was sought and approval was granted before the conduction of oral history. The informants participated in the interviews on voluntary basis. The consent forms, listing the details of the interviews, were given to the informants to sign in expressing that they were voluntary to take part in the interviews. Even if they sign the consent forms, their withdrawal of the interview was respected at their own accord.

The storage of interview data, including the raw data and the transcription, is another important issue in oral history. The interviews of seven informants were audio-taped by mobile phone. All records were downloaded to my personal computer which required access by password. The audio-taped files in the mobile phone were deleted after being downloaded. The transcription work was conducted in the personal computer requiring my password. Therefore, the privacy of data, in this research, is well-protected. In writing my thesis in public area, I would use my notebook computer which also required password access.

Interview data would be deleted three years after the publication of thesis. The informants were informed about this in the interviews and they were satisfied about this arrangement.

4.7 Chapter Summary

This chapter illustrates how the two research questions answered by the qualitative research. The methods of documentary analysis on curriculum materials and Legco documents, and the oral history of the curriculum players are adopted to tackle the research questions. I also address how I conduct this research by referring to its planning, collecting data and analysing data.

The qualitative research results often give people subjective feeling. However, data collection and analysis processes in this research were conducted in scientific rigour. Methodological triangulations between documentary analysis and oral history served to enhance the trustworthiness. This research is grounded on fact and scientific research approaches.

Chapter Five

The Emergence of Advanced Supplementary Level Liberal Studies as an Independent Subject (1992-2012)

5.1 Introduction

Narrative inquiry⁶ provides an account of the emergence and evolution of ASL LS and NSS LS in this chapter and next chapter respectively. The narration of this chapter guides the readers to understand the grand picture of the Liberal Studies and infer the factors affecting Liberal Studies.

The discussions on ASL LS are further divided into three phases with distinctive characteristics. Phase 1 is a background section discussing the period before the actual implementation of ASL LS (late 1970s to 1992). Phase 2 and Phase 3 match cover the respective periods 1992 to 2004 and 2005 to 2012 respectively. Since the introduction of the new academic structure in 2009, NSS LS has been delivered as a core subject. Consultations about NSS LS began in 2004 (CDC and HKEAA, 2004 and 2005), which increased the popularity of ASL LS.

⁶ Narrative inquiry uses field texts, such as stories, autobiography, journals, field notes, letters, conversations, interviews, family stories, photos (and other artefacts), and life experience, as the units of analysis to research and understand the way people create meaning in their lives as narratives.(Clandinin and Connelly, 2000)

5.2 Phase 1: Period before the Implementation of ASL LS (late 1970s to 1992)

The ASL LS curriculum commenced in 1992 and ended in 2012. This period is comparatively well-known by educators in Hong Kong. Nonetheless, few know about the emergence of Liberal Studies during the period before 1992. It is interesting and illuminating to develop a narrative covering the period before 1992, more exactly from late 1970s.

5.2.1 Early Proponents of Liberal Studies in Hong Kong

Prior to the introduction ASL LS in 1992, the idea of Liberal Studies had been initially proposed and rejected in 1978. The Rev. Joyce M. Bennett and Dr. Wu, S.C., Alex were the pioneers of introducing Liberal Studies to Hong Kong's Legco. This part of the history of Liberal Studies has not been well documented in the available literature.

Rev. Joyce Margaret Bennett was an Anglican priest working in the Diocese of Hong Kong. She spoke and campaigned publicly on numerous issues, including being a leading advocate of the provision of nine years free education for all, improvements to subvented hospitals, better educational facilities for the disabled, and better conditions for teachers. She also spoke out about the school inspectorate,

argued against the system of ‘bought places’ in secondary education and for the importance of remedial teaching for slow learners. For her contribution to Hong Kong society she was rewarded with an Honorary Doctorate in Social Sciences by HKU in 1984. (University of Hong Kong, 2015) She was insightful in acknowledging the importance of Liberal Studies well before the Llewellyn Report and subsequent decisions made by the Hong Kong government

“Basically the question of whether to have a one-year or a two-year Sixth Form course must be tackled. My concern for the Sixth Form is that it should be a worthwhile two-year course combining specialised with Liberal Studies, together with courses in both the Chinese and English Languages”

(Hansard, 5 July 1978, Rev. Bennett, Joyce M.:1146).

Dr. Wu, S.C. Alex was another pioneer of Liberal Studies in Legco in Hong Kong. He was a Hong Kong merchant, the Vice-chairman of the Hong Kong Stock Exchange, and a member of the Advisory Committee of the Securities and Futures Commission. In a more specific context, he proposed that Liberal Studies should be introduced in the technical institutes in late 1970s.

“Government does not consider that ‘Liberal Studies’ should be introduced as part of the regular curriculum in the technical institutes. I think that is a regrettable decision and I hope it will be reconsidered”

(Hansard, 6 July 1978, Mr. Wu, S.C., Alex.:1171).

Perhaps their speeches were the earliest historical recorded advocacy of a Liberal Studies curriculum in Hong Kong. Their proposals deserve further investigation.

First, why was Liberal Studies not offered before 1992? Secondly, it is worthwhile to examine whether Liberal Studies might have been introduced in technical institutes a few decades ago, and why it did not happen.

The Llewellyn Report reviewed the academic structure of Secondary School years 6 and 7 in Hong Kong and recommended expanding the subject choice for senior secondary school students (Visiting Panel, 1982). This report explained the rationale to introduce Liberal Studies in Hong Kong.

A further report, *Education Commission Report No. 2*, was published following the three major recommendations of the *Llewellyn Report*.

- (1) To retain the two-year Advanced (A) Level examination;
- (2) To abolish the one-year High (H) Level examination; and
- (3) To create the Intermediate (I) Level (Education Commission, 1986).

I Level, subsequently renamed Advanced Supplementary Level (ASL), was equivalent to a half subject of A Level.

“The I levels ... briefly we see these being developed from, and as part of, the A level curriculum. They would be ‘half subjects’ in that they would represent half the teaching time required for A levels, and accordingly they could be used both to broaden the two-year course and to provide a one-year course with a formal exit qualification for those leaving the sixth form after Form 6.” (Education Commission, 1986:82)

Liberal Studies was formally considered by the *Llewellyn Report* in 1982 and by the Education Commission, an official advisory organisation for education affairs in Hong Kong, as a result of the proposals made in the *Llewellyn Report*.

“As mentioned in Chapter 2, Education Commission thought three A level courses represented too narrow a concentration of subjects, both in terms of students’ requirements for general educational purposes and, in our view, as a preparation for higher education.”

(Education Commission, 1986: 80)

The new ASL would enable sixth-form students to enrol in more subjects. As such, the students would be able to broaden their horizons, which was one of the core missions of Liberal Studies (Morris and Scott, 2003).

ASL LS became one of the new subjects in matriculation from 1992 to 2012. Instead of transferring knowledge through conventional subjects, ASL LS aimed at promoting generic skills such as critical thinking. This was a breakthrough in curriculum development in Hong Kong resulting in a shift from content-based to skill-based learning.

“There is no intention to provide students with sets of factual knowledge which call for rote recall, but rather to encourage students to visualise the complexity of the issues and to develop their abilities for critical thinking”
(CDC, 1996:6).

5.2.2 Puzzle of the Emergence of ASL LS

Professor Paul Morris and Dr. Chan, K.K., former lecturers at HKU, asserted that understanding Hong Kong and China was a key purpose of the emergence of Liberal Studies.

“Liberal studies emerged as an attempt to broaden the sixth form curriculum and its content was also influenced by the transition of sovereignty. The syllabus demanded a more critical orientation and focus on tensions, controversies and uncertainties. This was manifested in the subject’s aims, assessment modes and the nature of the issues in the China today module and the Hong Kong studies module... The impending return of the sovereignty of Hong Kong to China, and its political future, had a direct impact on the choice of modules and their content. The Hong Kong Studies module and China Today module provided distinct foci on Hong Kong and China, respectively. These modules made a conscious link or comparison between the two places, particularly regarding social and political issues such as the concepts of law and democracy.”

(Morris and Chan, 1997a:259)

They also stressed that ASL LS emerged as a result of the signing of Sino-British Joint Declaration.

“The emergence of Liberal Studies as a sixth form subject at ASL in 1989-1991 was another manifestation of the government’s response to the changing socio-political contexts arising from agreement on the return of sovereignty in 1984 era, the signing of Sino-British Joint Declaration ... ”

(ibid)

Although other modules did not focus directly on Hong Kong or China, they also had conscious, and sometimes implicit, comparisons of various elements of the current situation of the two places, such as their ranking in different economic and

technological arenas. Furthermore, unlike civic education, a degree of controversy was the guiding principle in the selection of the curriculum content.

The postulate of Professor Morris and Dr Chan is widely recognised in academic publications. However, two prominent interviewees, Wayne and Thomas, who worked for the Hong Kong government's curriculum development programme were less certain ASL LS was a response of Sino-British Joint Declaration. Wayne said,

“In public, there was such comment [Sino-British Joint Declaration leading to the birth of ASL LS]. ASL LS aimed at cultivating the literacy of next generation. But whether it served the political purpose, it was uncertain.”
(Wayne)

If Wayne did not state a clear view on whether there was relationship between Sino-British Joint Declaration and ASL LS, Thomas, another former government interviewee, totally rejected a cause and effect relationship. He commented that ASL LS was more a result of curriculum advancement than political progression.

“There is no direct relationship between Sino-British Joint Declaration and ASL LS. There were whole ranges of ASL subjects put forward as a result of Visiting Panel Report. Offering half subjects was a culture change at that time.”
(Thomas)

The view of Thomas suggests an evolutionary approach to curriculum development. The puzzle presented by these different views is subject to further debate below.

There was a potential blossoming of ASL LS in 1992 because the initial recommendation of the Working Group on Sixth Form Education (1988-1989) was to make Liberal Studies a core subject to be taken by all sixth form pupils (Education Department, 1989). The recommendation was followed by the setting up of a joint working party of the independent HKEA and CDC for the purpose of designing a Liberal Studies curriculum/teaching syllabus for schools (Morris and Chan, 1997a). However, the attempt to apply core status to ASL LS was in vain.

This failure to introduce Liberal Studies as a core subject was further explained by the interview with Wayne (a former government curriculum developer) in 2014.

“When the [Llewellyn] Report was released, all secondary schools trusted that the suggestion [of putting Liberal Studies as a core subject] would be put into practice. However, this recommendation was not accepted in the Senate of the University of Hong Kong (HKU) as the criterion of admission and other universities followed... The public would like to have a subject which can cultivate the nurture of the students such as thinking skills and value enhancement. It is a dream. However, there were fierce competitions of university students. Therefore, they did not consider Liberal Studies as a core subject for university admission.” (Wayne)

Morris and Chan (1997a) also explained that insufficient recruitment and fear of cutting back of funding were impediments to introducing ASL LS as a core subject.

“In 1989 the decision to expand tertiary education rapidly to provide for 18% of the age cohort changed the situation. The universities feared that they would not be able to recruit sufficient numbers of qualified applicants and that this would result in cutbacks in funding. The

competition between tertiary institutions to recruit school leavers was heightened and no single institution was willing to make Liberal Studies a requirement for entry.” (p.260)

ASL LS was not implemented as a core subject in the sixth form curriculum from 1992, but it was adopted as an optional subject in slightly more than 10% of schools with sixth forms (ibid). Kevin, a vice principal interviewee, articulated the reasons not to offer ASL LS from the perspective of school curriculum developers:

“Initially yes, [I considered introducing ASL LS] but the decision was rejected [in my school]. First, this subject [Liberal Studies] was converted from core subject into elective subject and it went against the fostering of generic skills. Secondly, the scope of study was narrowed down. Thirdly, considering [the limited] manpower and other settings, we decided not to offer this subject.” (Kevin)

Making ASL LS optional reduced public concern by defeating the original purposes of ASL LS – a subject with genuine curriculum integration and fostering generic skills.

Public concern about ASL LS seems to have been mild and there are few official notes of concern in the Legco documents. Apart from the elective nature of ASL LS, the organisation in making education decisions was very different from the ministerial government of the HKSAR. The Education Commission, established in 1984, was the highest advisory body on education during the colonial period after the 1980s, and during the early HKSAR Government up to early 2000s. It served the following function:

“It advises the government on the development of the education system in

the light of community needs. Its terms of reference is to define overall objectives, to formulate policy and recommend priorities for implementation.” (Hong Kong Government, 1992:125)

Since its inception in 1984, the Education Commission along with other players, had considerable influence on educational policy in Hong Kong (Morris, 1995). As Sweeting (1995) commented,

“In terms of policy-making structures, perhaps the most important development in Hong Kong of the last decade is the establishment of the Education Commission and the series of reports which it has issued. These have provided at least the semblance of rational, long-term planning and have certainly succeeded in stimulating public debate.” (p.123)

The Education Commission played a crucial role in formulating education policy in the colonial period of Hong Kong (Morris and Adamson, 2000). From 1984 to 2000, the Education Commission made seven influential reports shaping education policy in Hong Kong. (Morris, 1995)

Renowned sociologist Professor Ambrose King, Yeo Chi’s (1975) concept of ‘administrative absorption of politics’ helps explain the existence of the Education Commission.

“Administrative absorption of politics means a process by which the government co-opts the political forces, often represented by elite groups, into an administrative decision-making body, thus achieving some level of

elite integration; consequently, the governing authority is made legitimate, a loosely integrated political community is established.”

(King, 2003:72)

The members of the Education Commission were recruited from the elite of Hong Kong and it was the intention of the colonial government to absorb these elites to enhance its legitimacy. This was a common practice of British colonial governments.

The Education Commission therefore became the main arena for debate about education policy; it overrode the mechanism in Legco in this respect during the late colonial period. The role of Education Commission obscured the controversial nature of ASL LS since the major debate did not take place in the Legco chamber. As a result, there are few Legislative Proceedings relating to ASL LS.

5.2.3 Curriculum of ASL LS

This sub-section explores the curriculum of ASL LS: a curriculum closely related to daily life by taking an issue-enquiry approach and aimed at understanding Hong Kong and China. The introduction of the Liberal Studies curriculum made explicit an intention to overcome the constraints that typified many academic Advanced level subjects, which focused on abstract, decontextualised knowledge, and to liberate the minds of students by requiring them to study a wide range of real issues

that had an impact on their daily lives (CDC, 1996). In effect, Liberal Studies attempted to provide a more 'contextualised' and 'politicised' curriculum.

The six modules that made up the curriculum were: China Today, Hong Kong Studies, the Modern World, Human Relationships, Environmental Studies, and Science, Technology and Society (ibid). These were all designed to provide how the primary aim of the subject could be achieved and to develop the ability for critical thinking which, it was argued, is necessary for a well-educated person who is able to see the complexity of issues and understand other people's viewpoints. This goal reflected a social reconstructionist ideology that promoted the need for social and political awareness and critical thinking (Morris and Chan, 1997a).

Two interviewees, David and Wayne, provided pertinent information on the choice of six modules of ASL LS. David was the member of ASL LS subject committee. Wayne was government curriculum developer of ASL LS. Both David and Wayne were the pioneers of drafting ASL LS in Hong Kong.

Initially, according to David, ASL LS was considered a core subject with eight modules. However, many teachers opposed the large number of modules due to the

perception that the teaching load would be heavy. The number of modules was scaled down to six.

“ASL LS has quite a lot of choices. Students had six modules. Before, there were eight modules. When we put the draft for consultation, the teachers said that they were too wide coverage. Hence, we change from eight modules to six modules.” (David)

With regards to the curriculum content, Wayne stressed that four modules were borrowed from the *Guidelines on Civic Education in School* (CDC, Education Department, 1985). These *Guidelines* covered the following five learning themes:

- (1) The individual,
- (2) The individual and social groups,
- (3) The individual and society (Hong Kong),
- (4) The individual and the nation (China), and
- (5) The individual and the world (ibid, 14-41).

These five learning themes were categorised into four modules: Human Relationships (from themes 1 and 2), Hong Kong Studies (from theme 3), China Today (from theme 4), and the Modern World (from theme 5). Of the ASL LS syllabus, two modules: Environmental Studies and Science, and Technology and Society, were not covered in the *Guidelines*. Wayne immediately added.

“...Why do we have fifth and sixth modules if we borrowed ASL LS from the Guidelines on Civic Education in School? We should add scientific elements in Liberal Studies. In the world, there are Science Technology Society movements and therefore it was put as fifth module. There was no ASL Geography and Geography was put as Environment Studies module in ASL LS as a half subject. This explains our logic to form the whole Liberal Studies curriculum.”

(Wayne)

After a series of consultations, ASL LS was formed as a subject with six modules.

The candidates were required to choose two modules in the Hong Kong Advanced Level Examination (the public examination for university entrance, in Hong Kong), and were also assessed by a related project on their chosen modules.

5.3 Phase 2: ASL LS from 1992 to 2004

This sub-section explains the justifications for dividing the implementation period of ASL LS (1992 to 2013) into two different phases: Phase 2 (1992 to 2004) and Phase 3 (2005 to 2013). The division is based on the number of candidates attending the ASL LS examinations. Periodisation is useful to understand the scenes of ASL LS in Hong Kong before and after 2004. The different scenes of AS LS will be described in this sub-section 5.3 and sub-section 5.4 respectively.

5.3.1 Classification between Phases 2 and 3

The rising number of candidates justifies the division between Phase 2 (1992 to 2004) and Phase 3 (2004 to 2013) of ASL LS. The number of candidates who sat in the examinations is shown in Table 5.1. ASL LS was first taught in 1992. The same group of students took the first public examination, Hong Kong Advanced Level Examination, in 1994. The final ASL LS examination took place in 2012. A ‘make-up’ examination was provided in 2013 for students who had not performed satisfactorily in the 2012 public examination and wanted to try for better results in this final, private, examination.

Year	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
No.	897	924	950	1084	1144	1201	1166	1367	1260	1193	1279

Year	2005	2006	2007	2008	2009	2010	2011	2012	2013
No.	1381	1861	2519	3249	3350	3082	3176	2390	87

Table 5.1: Number of Candidates Attending the ASL LS Public Examination (1994-2013) (Source: Hong Kong Examination Authority and Hong Kong Examinations and Assessment Authority)

Two more phases were identified in the implementation of ASL LS. They are 1992 to 2004 (Phase 2) and 2004 to 2012 (Phase 3). The year 2004 acted as a watershed.

The phases are based on the number of candidates and the proposals of NSS LS as a core subject in 2004 (CDC and HKEAA, 2004 and 2005).

The number of candidates from 1994 to 2004 fluctuated at around 1000 students with a steady increase from year to year. A significant increase in the number of candidates was found in 2006 and a sustained increase in the number of candidates continued up to 2011. A noticeable increase to over 3000 candidates was recorded in 2008.

Although the significant increase in the number of candidates was recorded in 2006, I would argue that 2004 was the watershed, as the policy document consultations of NSS LS as a core subject were released. In anticipation of the introduction of NSS LS, school principals were more enthusiastic about introducing Liberal Studies and seized on the chance to make use of ASL public examinations as a testing ground for NSS LS. There was a time lag between policy implementation and the effect, so the increase in ASL LS candidates appears only later. I will investigate the general situation on the actual implementation from the angles of different stakeholders.

5.3.2 Informant Interviews

The number of ASL LS candidates in 1994 shows that the subject was not a popular choice. Day (1991) pointed out a comprehensive picture to explain the scene. ASL LS met resistance of initial implementation from principals because it was not one of the required subjects for admission to tertiary institutions. It was resisted by teachers as being un-teachable because they under-rated their students' capacity to develop new skills, such as critical thinking and problem-solving, that were not necessarily needed for studying the conventional subjects. ASL LS was also resisted by students as it did not appear to have model answers to the questions asked. Morris and Chan (1997b) also agreed that the students found it difficult to prepare for the examination, as there was no textbook to guide their conventional rote learning. As a result, ASL LS was symbolic policy of cross-curricular themes. There is no surprise that Wan (1991) and Wong (1992) observed that ASL LS failed to gain a foothold on the timetables of most schools.

Although ASL LS was not a popular choice of the students during its early implementation in the 1990s, some of the interviewees still appraised ASL LS as a breakthrough in curriculum development in Hong Kong. Elaine, a university lecturer, expressed her support for pro-active change on the curriculum.

“I believe that ASL LS was a big change in curriculum development in Hong Kong in terms of the initial attempt of curriculum integration. I like big change in curriculum development. ASL LS was an integrated curriculum facilitating learning across discipline in a holistic way.”

(Elaine)

Wayne commented that ASL LS was the realisation of a dream of the society.

“The public would like to have a subject which can cultivate the thinking skills and value of students. It is a dream of me and some teachers too.”

(Wayne)

The issue-enquiry approach, nurturing of thinking skills and value of students and an integrated curriculum, breaking the wall of subject disciplines, were the intention of ASL LS and also the two educator interviewees.

5.3.3 Feedback from Teachers

In Hong Kong, university graduates are trained in conventional subject disciplines.

This reflects an ‘academic rationalism’ that does not promote lateral thinking (Morris, 1995). Liberal Studies attempted to break the rigid subject boundaries.

When ASL LS was first introduced, most teachers did not have such a flexible mindset in teaching the subject. Levin, the vice principal interviewee, also shared a similar opinion.

“I believe teachers found difficulty to teach this subject. The teachers have been trained by disciplinary subjects and they do not get used to teaching integrated subjects. In my school, as a vice principal, I find few teachers are eligible to teach this subject in the past.”

(Levin)

Karst, another university lecturer, pointed out the discrepancy between the intended

curriculum and the implemented ASL LS curriculum in terms of the mode of curriculum integration.

“In the early period of ASL LS, each teacher was responsible for one module and with minimal co-operation. ASL LS was delivered no different from two separate subjects in some schools.” (Karst)

The schools could choose any two modules out of six to teach. The design used a low degree of subject integration. Instead of being taught by one teacher in an integrated approach, some schools assigned different teachers to each module. This further upset the original purpose of ASL LS to be an integrated curriculum.

5.3.4 Feedback from Students

Generic skills such as data collection and analysis skills were supposed to be the essential learning objectives in ASL LS. Students interpreted both quantitative data and qualitative data during lessons, projects, and examinations. However, Elaine recapped that her university students could pass the public examinations in ASL LS by using the traditional memorisation approach that they already used for other subjects.

“In discussing with my [university] students about the differences between ASL LS and NSS LS, they said that rote memorisation was enough to tackle the ASL LS tests and examinations. In this way, there were no significant differences between listing the points of environmental issues in Geography and answering the environmental impacts of Environmental

In another interview, Wayne further pointed out from which types of schools the first year ASL LS students emanated.

“Classifying students into bands is confined to Secondary five level. However, when we looked at the schools which chose ASL LS for their students, they were either schools with very good results or schools with bottom results enrolling ASL LS.”

(Wayne)

This supports Karst’s research on the purposes of ASL LS students.

“To high fliers, the students found ASL LS self-achieving and they could widen the horizons by having room to read newspapers. The bottom students liked the project learning. One of the major findings was the students could obtain legal permit to go out to do the project from parents, which counted 20% of subject marks.”

Combining the data supplied by Wayne and the observation of Karst, it seems that students appreciated ASL LS for contrasting and distinctive reasons. Some liked the curriculum content and design of ASL LS whereas other appreciated the freedom of learning. Despite the rote memorisation study methods employed by many students, ASL LS was a breakthrough in Hong Kong’s curriculum development, being the first attempt at subject integration.

Despite positive feedback and increasing attention from the Education Commission,

ASL LS from 1992 to 2004 did not receive much attention from the general public.

Morris and Scott (2003) argued that the introduction of ASL LS could be seen as a ‘symbolic policy’ from 1992 to 2004. Its impact on schools was minimal. The main reason for the ‘symbolic policy’ was the government’s failure to introduce ASL LS as a core subject.

“Their adoption was not mandatory and it was up to schools to decide whether to try to implement these changes. On the whole, there was little incentive to do so as the prevailing system of public assessment and rewards placed a premium on the maintenance of the status quo.” (p.77)

This phenomenon of ‘implementation myopia’ produced a gap between the policy makers’ intentions and the reality of implementation in schools (Morris, 1995). The outcome of symbolic action, as noted by Cuban (1992), was “a façade of change, a well-developed policy rhetoric but a failure to achieve a significant impact on schools” (Morris and Chan, 1997b:256). Historical evidence shows that the decision made by HKU not to accept ASL LS as one of their entry criteria had a determining effect on the historical development of Liberal Studies during this phase.

This decision led to a failure of ASL LS as a compulsory subject, causing a chain reaction on the curriculum organisation and actual implementation. The change from an integrated curriculum to a modular approach and the deviation from the proposed

issue enquiry approach defeated the purpose of the original design of ASL LS.

5.4 Phase 3: ASL LS from 2005 to 2012

Phase 3 (2005 to 2012) was characterised by a resurgence of discussion and consideration of ASL LS, due to the comprehensive and territory-wide education reforms proposed by Hong Kong's first Chief Executive Mr. Tung, Chee Hwa in his inaugural, 1997, Policy Address. In this he requested the Education Commission to thoroughly review the Hong Kong education system, in view of public concerns over several education issues: a comprehensive review was also timely and necessary, in view of the rapid changes Hong Kong had undergone on the economic, political, social and cultural fronts in the run-up to the hand-over, and the need to meet the new challenges in the 21st century (Hong Kong Government, 1997).

The consultation document, *Education Blueprint for the 21st Century: Review of Academic System: Aims of Education*, was issued by the Education Commission in 1999 (Education Commission, 1999). In this document, the Commission espoused the view that the aims of education in Hong Kong were changing from 'learning' to 'learning to learn':

“To enable everyone to develop to their full and individual potential in all areas covering ethics, intellect, physique, social skills and aesthetics, so

that each individual is ready for continuous self-learning, thinking, exploring, innovating and adapting to changes throughout life, filled with confidence and team spirit; and is willing to strike incessantly for the prosperity, progress, freedom and democracy of the society, and to contribute to the future well-being of the nation and the world at large.”

(ibid: 15)

Liberal Studies was re-emphasised in *Learning to Learn: the Way Forward in Curriculum Development Consultation Document* published in 2000, which explicitly stated the direction education should take after the consultation period in 1999.

“The ASL Liberal Studies has served two good functions in the sixth form curricula. Firstly, it helps to broaden the existing sixth form curricula by providing a range of modules that could complement the subject streams (e.g. China Today; Science, Technology & Society; Environmental Studies; Hong Kong Studies; Modern World). Secondly, there is evidence in HKEA’s public assessment that student projects can promote independent learning and critical thinking. The Liberal Studies curriculum will further be modified in line with the Education Commission recommendation to serve the two functions better through updating the choice of modules, increasing the weighting of student projects by reducing the requirements on the number of modules to be studied.”

(Education Commission, 2000: 40-41)

Reform Proposals for the Education System in Hong Kong was published in September 2000, mapping out the general direction of Hong Kong education development (Education Commission, 2000). In the proposal, a new culture of teaching and learning was suggested (Sections 5.2.7 to 5.2.9, as shown below):

- “(1) *Shifting from transmission of knowledge to learning how to learn*
- (2) *Shifting from over-emphasizing academic studies to focusing on whole-person development*
- (3) *Shifting from compartmentalised subjects to integrated learning*” (ibid).

The idea suggested in the *Reform Proposals* can be viewed as a cradle for NSS LS in that it introduced a new culture to teaching and learning. Eventually, in *Review of Education System: Framework for Education Reform Learning for Life*, the mandatory nature of NSS LS was confirmed.

“Under the new senior secondary curriculum, we [Education Commission] propose that every senior secondary student should take *Liberal Studies* (tentative title), so that they will be able to analyse practical problems from a wider perspective by applying cross-curricular concepts and knowledge. We also encourage schools to minimise the use of instruction-style of learning, and provide students with greater opportunities to acquire knowledge through actual participation, exploration, and research. This will help students learn how to learn and experience the joy of learning, and eventually develop self-learning ability and a culture of life-long learning.”
(Education Commission, 2003:16)

Changes in the academic structure were also proposed by the Education Commission in 2003. Since 2009, the ‘3, 3, 4’ academic structure (three years’ junior secondary level, three years’ senior secondary level and four years’ university level respectively) was put forward to replace the existing academic structure (‘3, 2, 2, 3’, corresponding to junior secondary, certificate level, advanced level, and university level, in terms of years of study). Consequently, students under the new academic

structure have been required to take only one public examination, the Hong Kong Diploma of Secondary Education Examination (HKDSE), since 2009.

The first Hong Kong Special Administrative Region (HKSAR) education reform policy was an influential and top-down policy that changed the education policy philosophy in Hong Kong. However, the reintroduction of NSS LS as a core subject had an unexpected impact on ASL LS. Under the education reform, as previously mentioned, public consultations were conducted in 2004 and 2005 by the CDC (ibid). The *Curriculum and Assessment Guide* was issued in 2007 by the same Council (CDC and HKEAA, 2007). This created a change in atmosphere and stimulated public interest in Liberal Studies. Referring to Table 5.2 showing the number of candidates taking ASL LS public examination, there was significant increase in the number of candidates in and after 2006. The greatest percentage increase in the number of candidates was recorded in 2006, 2007, and 2008 (34.8%, 35.4%, and 30.0% respectively).

HKSAR education reform policy was the core factor in shaping the development of ASL LS from 2005 to 2012. Without the education reform, ASL LS would not have captured the close attention of public.

5.5 Chapter Summary

Three phases of ASL LS, pre-1992 (Phase 1), 1992-2004 (Phase 2) and 2005-2017 (Phase 3) have been described. Phase 1 dates the development of ASL LS from the advocacy of the idea of liberal studies in 1978 to the preparation of ASL LS. In Phases 2 and 3, two key factors were recognised as essential forces shaping the curriculum development of ASL LS.

Opposition from the HKU's Senate to ASL LS as an acceptable qualification for university entrance impeded the curriculum development of ASL LS from 1992 to 2004. However, education reform by the first post-colonial administration, led by Chief Executive, Mr. Tung, Chee Hwa facilitated the development of NSS LS and indirectly favoured the development ASL LS from 2005 to 2012.

Chapter Six

Rise and Decline of New Senior Secondary School Liberal Studies

6.1 Introduction

NSS LS, as one of the core subjects in HKDSE, has been a focus of public interest, concern, and debate since the commencement of public consultations in 2004 by the CDC. With the support of the Chief Executive, Mr. Tung, Chee Hwa, Secretary for Education and Manpower Professor Arthur Li, Kwok Cheung, and Permanent Secretary of the same bureau Mrs. Fanny Law, Fan Chui Fun, NSS LS was implemented in 2009; the first batch of students took the HKDSE in 2012.

In this chapter, three phases are identified to help understand the development of NSS from 2004 to 2014. Phase 1 (2004 to 2008) was about the public consultations on and preparation for NSS LS. In this phase, the effort and determination of the HKSAR government in backing up NSS LS are shown. However, despite a top down approach (or perhaps because of it) and the determination of government to implement NSS LS, the Hong Kong public were sceptical about making Liberal Studies mandatory. This was revealed in the consultations and even during the actual implementation period.

Phase 2 (2009 to August 2014) was the actual implementation of NSS LS; the teachers and the Legco Councillors⁷ were still unsure about the assessment. Despite the uncertainties as perceived by the public, the government still maintained its support for NSS LS.

In Phase 3 (September 2014 to December 2014), as described in chapter 1, the Umbrella Movement took place. This movement seems to have led to a change in the government attitude towards NSS LS, as Liberal Studies took some of the blame for causing the Umbrella Movement. Throughout three phases of NSS LS, we can witness the bumpy development of NSS LS surfing along the changing government policy and political situation of Hong Kong.

6.2 Phase 1: Public Consultations on and Preparation for NSS LS (2004 to 2008)

Phase 1 was mainly characterised by the preparation work of the CDC and HKEAA, including drafting the curriculum, designing the assessment, and training potential Liberal Studies teachers.

⁷ See Appendix 6.1 for the background of Legislative Councillors expressed their opinions about NSS LS in Legco Chamber.

6.2.1 Drafting the Curriculum Development and Assessment Framework

Following Mr. Tung's announcement on the education reform in 2000 (Education Commission, 2000), work began on the development of the curriculum and designing the assessment framework for NSS programmes. Three consultation documents (2004, 2005 and 2006) and one curriculum and assessment guide (2007) were published by the CDC and HKEAA, and discussed in Legco. Besides receiving written feedback from the public, questionnaires were sent to schools in 2004, and public consultation seminars, coinciding with the release of consultation documents, were organised for teachers by the EDB in order to solicit a comprehensive set of opinions.

The HKSAR government seems to have put significantly more effort into the public consultations for the NSS LS than its predecessor had for the ASL LS. The three consultation documents and the curriculum and assessment guide are essential documents setting the background for the changing debate during the genesis of NSS LS. The content of the four documents are summarised in Table 6.1.

Year	Name of Document	Curriculum Structure	Mode of Public Assessment
October 2004	Proposed Core Subject Framework for the New Senior Secondary Curriculum Liberal Studies 1 st Draft (For Consultation)	9 modules including 9 compulsory units, 6 elective units and an Independent Enquiry Study	(1) External Written Examination (70%): Paper One (180 mins) covers the compulsory part of the curriculum; Paper Two (105 mins) covers the elective part. Both papers are assessed by data-response questions, structured-type questions and essay-type questions. (2) School-based Assessment (30%): includes coursework, performance in class activities, results of school tests and exam
May 2005	Proposed Core Subject Framework for the New Senior Secondary Curriculum Liberal Studies 2 nd Draft (For Consultation)	6 modules including 15 compulsory units and an Independent Enquiry Study	(1) Written Examination (70%): Paper One (105 mins) consists of three compulsory data-response questions (40%); Paper Two (75 mins) consists of four essay questions, of which candidates answer two (30%). (2) School-based Assessment (30%): includes Independent Enquiry Study and the Course Performance.
June 2006	Liberal Studies Curriculum and Assessment Guide – Secondary 4-6 Provisional Copy	6 modules including 12 compulsory units and an Independent Enquiry Study	(1) Public Examination (80%) Paper One: data-response questions (120 mins) (50%) Paper Two: essay questions (60 mins) (30%) (2) School-based Assessment (20%): Independent Enquiry Study
2007	Liberal Studies Curriculum and Assessment Guide – Secondary 4-6	Ditto	Ditto

Table 6.1: Major Summary of Consultation Papers and Curriculum and Assessment Guide on NSS LS by CDC and HKEAA (2004, 2005, 2006, 2007)

In the *Proposed Core Subject Framework for the New Senior Secondary School Curriculum: Liberal Studies 1st Draft (For Consultation)*, CDC and HKEAA (2004) proposed a syllabus covering 15 modules (See Appendix 6.2) over three academic years and the completion of Independent Enquiry Studies (IES) in about 200 to 250 teaching hours (p.10), which was equivalent to 13 to 17 teaching hours per module. It was proposed that the students would be assessed by external written examination and school-based assessment consisting of coursework, class performance, and IES.

Secondary school principals and teachers generally commented that the CDC had put forward an aggressive curriculum and attempted to achieve too much within a short teaching period. The time spent on each module was far from adequate. It was difficult for the teachers and students to cover 15 modules (nine compulsory modules and six elective modules) using a student-centred, interactive, and enquiry approach in three years (Wu et al., 2007).

After a seven-month public consultation, in the face of the questions and opposition from Legislative Councillors and educator practitioners, the CDC made a moderate concession on NSS LS. The number of core modules was cut from nine to six to allow more teaching hours for each module.

“The vision and curriculum objectives of the Liberal Studies subject are also generally agreed by all sectors. However, having taken into account concerns and views from the educators, we have decided to reduce the number of core units of Liberal Studies from nine to six, so that students will have ample time to study thoroughly the relevant issues” (Hansard, Secretary for Education and Manpower, 18 May 2005:7487).

The reduction was an unexpected compromise by the Government. The immediate cause of the concession seems to have been errors made by the education ministry, headed by Professor Li and Mrs Law. The story, delivered in later section of this chapter, can be traced back to the extra burden imposed on teachers.

The government was originally very optimistic about winning public support on introducing Liberal Studies as a core subject in early 2004. My informant, Nancy, a serving teacher with a close working relationship with the Education Bureau, reported the two senior government officials, Professor Li and Mrs Law, as having had strong affiliations with CUHK, and this affiliation was suspected to be one of the main reasons to put Liberal Studies in a key position in NSS curriculum.

“The government support on the Liberal Studies was mainly initialised by Professor Li, the former Vice Chancellor of the Chinese University of Hong Kong and Mrs. Fanny Law, the Permanent Secretary of Education and Manpower who studied the Master of Education in the Chinese University of Hong Kong. Their affiliations with the Chinese University of Hong Kong, the first university promoting General Education have inspired their enthusiasm in developing NSS LS.”
(Nancy)

In public statements, Professor Li justified making the NSS LS a compulsory subject by three reasons (Minutes of Special Meeting of Panel on Education, 29 October 2004:3). First, he pointed out that Liberal Studies had been implemented in ASL since 1992. The government should therefore have sound experience on implementing this subject and school-based subjects. Schools offering Liberal Studies could share their experience.

“Secretary for Education and Manpower responded that Liberal Studies was not a new subject and was currently studied at the Advanced Supplementary Level (ASL), although the proposed design expanded and

improved the ASL syllabus to meet the changing circumstances in Hong Kong. The good practices, experiences, and reflection developed from teaching ASL, Integrated Humanities, and Science and Technology under the existing structure would be used to support other schools that had little experience in the teaching of the subject.” (ibid)

Second, NSS LS received support from the vice-chancellors of the universities in Hong Kong in respect of both the new academic structure and its mandatory status. Universities’ support has been crucial for academic restructuring because the goal of most students is to enter university. In Chapter 5, we learned that ASL LS failed in its bid to be accepted as a compulsory subject due to opposition from the Senate of the HKU. In contrast, the universities supported the EDB for the ‘3, 3, 4’ structure, and had announced its intention to incorporate the proposed new core subjects, including Liberal Studies, as the general admission criteria for undergraduate programmes.

The third reason supporting implementation of the compulsory NSS LS was grounded on the public consultations conducted by the EDB. In Hansard of 18 May 2005, the Secretary of Education and Manpower, Professor Li, expressed his satisfaction about the positive responses towards the NSS LS.

“The consultation period on the “3, 3, 4” academic structure reform has ended on 19th of this month and the Education and Manpower Bureau has received more than 3 200 written representations from members of the public and organisations, as well as 480 questionnaires returned by schools. My colleagues and I are very much encouraged by the positive responses of various social sectors to the academic structure reform” (Hansard presented by Secretary of Education and Manpower on 28 January 2005:4030).

The educational dreams of Mr. Tung were idealistic but his top down Education Reform created substantial workload and anxiety for teachers. There was a clear divergence between the dream and the reality in the preparation phase of NSS LS.

Since the commencement of the education reform in 2000, the heavy workload of teachers has been a pressing issue in the profession, not only in the public consultation and preparation phase but also the implementation phase. Hong Kong teachers reported long working hours, causing stress, voice problems, musculoskeletal disorders, mental health problems, suicidal thoughts, and suicidal planning. The heavy workload experienced by Hong Kong teachers and directly related to the daily teaching routine tends to be detrimental to their health. (Jin et al., 2008). The pressure of NSS LS on teachers was a major concern of the Legco.

Legislative Councillor Mrs. Regina Ip, Lau Shuk Yee (See Appendix 6.1) pointed out that the teaching of Liberal Studies in universities was shared by several teachers, with the teachers delivering the part in which they had expertise. It was too demanding, she said, to expect one teacher to teach the whole syllabus of six modules.

“Mrs Regina Ip noted that in overseas universities, the subject of Liberal Studies was taught by several teachers. Some principals were concerned that it would be unrealistic in Hong Kong to expect a teacher to be well-versed in the various areas of Liberal Studies and to take on the teaching duty alone”

(Panel on Education Minutes of Meeting, 14 October 2008:6).

Another Legislative Councillor, Mr. Lee, Cheuk Yan (See Appendix 6.1), accused the Secretary for Education and Manpower of being self-opinionated and not taking into consideration the voice of teachers.

“I think the biggest problem with the entire education reform lies in the attitude of the Secretary. A bureaucrat who is self-opinionated, oblivious to the actual circumstances that are happening to teachers and schools, adamantly insists on the implementation of the education reform, lacks sensitivity and is unsympathetic and indifferent to other people's sufferings is the biggest problem with the entire education reform”

(Hansard, 18 January 2006 presented by Mr. Lee Cheuk Yan:4020).

Left with little choice, secondary school teachers have continued to tolerate the high work pressure. In the new academic structure, Liberal Studies was one of the compulsory subjects. This implied a drop in teaching hours available for elective subjects. Secondary school teachers, other than in Chinese, English and Mathematics, had to develop their proficiency in teaching Liberal Studies, or else they might lose their ‘rice bowl’. The pressure rose to a critical level, where any event could trigger an ‘explosion’.

In 2006, two experienced teachers, one aged 42 years and the other aged 54 years, jumped to their deaths from their high-rise apartments within four days of each other in early January. Mrs. Fanny Law addressed this issue on the radio by asking, “If their death is related to the education reforms, then why did only two teachers [commit suicide]?” (Taipei Times, 12 January 2006) Ronny Tong, Ka Wah (See Appendix 6.1) used an old Chinese proverb “the oil is added to the fire” (Hansard, 18 January 2006, Ronny Tong) to describe Mrs. Law’s insensitive comment, which produced the metaphorical fire-ball of the proverb. Mrs. Law was criticised by all political parties, from the pan-democratic alliance to the pro-establishment camp, in Legco on 18 January 2006.

The pro-establishment camp Legislative Councillor Ms Chan, Yuen Han (See Appendix 6.1) restated the hardship faced by teachers of the Liberal Studies programme.

“A very good friend of mine said to me, ‘Miss Chan, Liberal Studies is a good subject, but it means a lot of work. You will never know that in order to teach Liberal Studies, I do not have time for further studies anymore and in

order to make students understand, I have done a lot of work outside the classroom.'” (ibid)

The pro-democratic alliance Legislative Councillor Mr. Lee, Cheuk Yan (See Appendix 6.1) demanded a formal apology from Mrs. Law for her ‘cold blooded’ response⁸ to the suicides of two teachers seemingly due to pressure at work caused by education reform.

“Mrs Law absolutely owes teachers a formal apology. Another teacher said that he had to work from eight o'clock in the morning until eight in the evening with only one hour for lunch in the afternoon every day. He said honestly that he had often thought of killing himself because the stress on him was much too big. He said that Mrs Law must tender an apology openly, because teachers have sacrificed for the education reform” (The Hansard, 18 January 2006 presented by Mr. Lee Cheuk Yan:4020).

NSS LS imposed a heavy burden on teachers. Legislative Councillor Cheung, Man Kwong (See Appendix 6.1) (Hansard, 15 April 2010:6915) pointed out that the average class size in senior secondary school education remained at 40. Such a large class size does not favour IES or group discussion necessary under Liberal Studies.

During 2006, the Government was under almost unremitting attack because of Education Reform. The Government was unable to find any supporters within the Legco Chamber for the Education Reform policy, including the pro-establishment parties. Following Mrs. Law’s inappropriate and insensitive comment, the resistance and friction of teachers to Liberal Studies and education reform only increased. On 25 May 2007, the government compromised by deferring the implementation the School-based Assessment by two to four years.

⁸ The Professional Teachers' Union called Law's remark ‘cold blooded’ and demanded that she apologise for the impact of the education reforms, which teachers say is increasing their workload. The comment on Law’s remark is shared by many Legislative Councillors. (Taipei Times, 12 January 2006)

“To enable schools and teachers to familiarise themselves with the NSS curriculum and to relieve them of the extra burden resulting from teachers who might have to prepare students for both the Hong Kong Advanced Level Examination and the new Hong Kong Diploma of Secondary Education Examination in the double cohort year (i.e. 2011/12 school year), a strategic approach to implement SBA was endorsed by the CDC and the Public Examinations Board of the HKEAA after consulting the sector. The implementation timeline was finalised in March 2007. In brief, SBA for 12 subjects (including those with SBA currently in the HKCEE, Liberal Studies and the four science subjects (laboratory work only) will be implemented in 2012, while SBA for the other 12 subjects will be deferred for two to four years” (Panel on Education, An update on the progress of preparation for the New Senior Secondary Academic Structure (the 334) 25 May 2007).

There were also concessions over NSS LS in the consultation reports in May 2005 and June 2006. In terms of content, six modules were maintained but there was restructuring and streamlining on the themes. As a result, the modules “Managing Oneself under Personal Development and Interpersonal Relationships” and “Economic Restructuring under Society and Culture” were cancelled, while the two modules of “Meaning of Globalisation” and “Impacts and Responses” were combined into one single module entitled “Globalisation”. (CDC and HKEAA, 2005 and 2006) In addition, coursework, tests, and examinations and classroom performance were eliminated, leaving IES as the only School-based Assessment component.

The concessions of the School Based Assessment of HKDSE subjects, trimming the content and streamlining of School Based Assessment of NSS LS came after the uncomfortable comments made by Mrs. Fanny Law and the widespread attack on the Education Reform. Law apologised for her remark during a radio phone-in show, saying she “chose the wrong word”, but she did not offer an apology for the impact of

the reforms (Taipei Times, 12 January 2006). Although it seems unlikely that public pressure was the sole factor contributing to the concessions, public and political pressure clearly played a part in shaping the history of NSS LS. This series of compromises proved a setback for NSS LS.

In order to analyse the change of assessment framework from consultation to final framework, Table 6.2 is extracted from Table 6.1

Public Assessment Components	Initial Draft in 2004			Provisional Final Draft in 2006			C and A Guide 2007		
	Content	Weighting	Exam Duration	Content	Weighting	Exam Duration	Content	Weighting	Exam Duration
Public Examination	Paper 1	70% (marks allocation is not suggested)	180 mins.	Paper 1	50%	120 mins.	Paper 1	50%	120 mins
	Paper 2	30%	105 mins.	Paper 2	30%	60 mins	Paper 2	30%	75 mins
School-based Assessment	IES, coursework, class performance	30%		IES	20%		IES	20%	
Remarks: Paper 1: Data Response Questions Paper 2: Extended-response Questions (the name has been formalised in the Curriculum and Assessment Guide 2007) IES – Independent Enquiry Studies									

Table 6.2: Summary Table of the Public Assessment Components of Consultation Papers (2004 and 2006) and Curriculum and Assessment Guide (2007)

Fine-tuning was carried out on both public examination and school-based assessment components and weightings between the 2004 consultation and the publication of the 2007 curriculum and assessment guide. Regarding the public examination, the public did not offer much opposition to the format of data response and extended-response questions. Candidates were to refer to sources such as statistics, tables, graphs, text, and cartoons; then, they had to analyse the information, find out patterns, give their opinions and present arguments. The extended-response question required candidates

to discuss specific issues in greater depth and breadth.

However, in the 2007 document, the examination time for both Paper 1 and Paper 2 was cut by 30 minutes and the number of questions was cut accordingly, compared with the first proposal in 2004. The CDC and HKEAA made this decision based on the consideration of different abilities between AS Level students and NSS students.

“Reduction in assessment time and the number of questions are the considerations of the lack of public examination experience of NSS students compared with AL students. A public examination with four hours and fifteen minutes is too demanding for NSS students in terms of both physical and mental ability.”

(Wayne)

In the first proposal of 2004, the weighting of public examination and school-based assessment was 70% and 30% respectively. A large percentage of teachers thought problems might arise given that too much weight was given to School-based Assessment (SBA). A survey done by EMB in 2005 revealed the problems expressed by teachers including increasing workload, lack of clear guidelines, insufficient manpower, lack of professional knowledge of teachers and vulnerability to appeals by parents. Hence, excluding the course work and class performances, IES became the single assessment item in SBA with the weighting reduced from 30% to 20%. The weighting of public examinations increased to 80% accordingly.

6.2.2 Professional Development of NSS LS In-service Teachers

The CDC and HKEAA facilitated the professional training of NSS LS in-service teachers by providing training courses (Wong and Wong, 2007). Five types of training courses were offered to in-service teachers and the details are presented in Table 6.3.

Course Types	Course Content	Organising Body
(1) Curriculum Interpretation	This course aimed at equipping the teachers with the ability to interpret the guiding questions used in the curriculum guide and the issue enquiry approach.	CDC
(2) Learning and Teaching	This type of course focused on the learning and teaching strategies and pedagogies of three respective study areas of NSS LS: Self and Personal Development, Society and Culture, Science, Technology and the Environment.	Universities
(3) Assessing Student Learning	This course familiarised teachers with the format and design of setting test and examination questions. The courses were mainly the responsibility of the HKEAA.	HKEAA
(4) Independent Enquiry Studies	This course trained teachers to supervise students taking the IES in NSS LS. The mini-research methodology was discussed and applied.	Universities
(5) Enriching Knowledge	Enriching knowledge was held in the format of seminars to augment the teachers' knowledge on specific issues.	Invited speakers by CDC

Table 6.3: Liberal Studies Training Courses Organised by EDB for NSS LS

Training courses from (1) to (4) were structured as workshops with five to six sessions per course, lasting a total of 15 to 18 hours. The training hours in category (5) usually lasted for 2 to 3 hours depending on the breadth and depth of topic.

Wayne recalled that the strategy of organising public consultations on the Liberal Studies curriculum in parallel with training courses was innovative and intelligent. He regarded the strategy as a lesson learnt from the ‘failure’ of launching ASL LS.

“I used a breakthrough and intelligent approach in promoting teacher professional development of NSS LS. Public consultations were conducted before professional development in usual government practice but public consultations and teacher professional development proceeded at similar pace in NSS LS. Furthermore, I attempted to invite more parties to take part in professional development by using one tender to multiple service providers. I wish to involve more parties to engage in NSS LS.”

(Wayne)

Wayne put forward an idea of professional training based on the concept of ‘teacher identity’. First of all, he suggested, arranging teachers’ professional development in parallel with public consultation was an attempt to shift teacher identity from the subject discipline in which they were originally trained to that of ‘Liberal Studies Teacher’. Morris (2004) observed that the policymaking elite in Hong Kong has maintained a strong view that teaching only requires teachers to have technical skills for transmitting information to prepare pupils for public examinations. However, with the initiation of new and very different education reforms in Hong Kong, the teaching and assessment of students by teachers could not be achieved by teachers simply using traditional teaching methods, as the policy-making elite believed (Klenowski, 2000; Yung, 2002). Instead, special expertise was required.

The general idea, expressed by Wayne, was very similar to Morris’s. Wayne tried to shift the teacher identity to Liberal Studies as soon as possible through the professional training programmes. Teacher identity, the ‘teacher-self’ along with several concepts that cluster around it, such as identity, individuality, fulfilment (Zembylas, 2005), are essential elements of the intrinsic motivation of teachers. Wayne’s suggestion and practice were promising but idealistic. In terms of quantity, from October 2005 to August 2007, Wong and Wong (2007) pointed out that approximately 3,200 teachers commenced training to teach Liberal Studies (p.12). It is difficult to conclude, based solely on the number of teachers who received training, whether the teacher professional development strategy was successful or not. The quality of the professional development would have also been an important indicator.

Elaine, the university lecturer interviewee, cited the scene in the outsourced training courses organised by EDB and said that she could see the teachers were against the NSS LS.

“There were lots of training courses but many teachers brought negative emotion to the courses. To novice teachers, they believed that government⁹ had key role in drafting the curriculum. But, nowadays, the teachers have had strong role in designing and drafting the curriculum. Few teachers had academic background, mentality, and readiness in this subject. The Government¹⁰ only provided resources and money but it did not provide enough on-site support. Whether it was a successful experience to schools, it was really school by school and case by case.”

(Elaine)

In commenting the observations of this university trainer, Wayne did confess that there were variations on the effectiveness of the programmes. He further pointed out that the CDC placed a stronger priority on running core training courses on Curriculum Interpretation and Assessing Students Learning, and that they ran these courses themselves. However, with existing manpower, it was difficult to launch all the courses directly through the CDC. They outsourced the knowledge and pedagogical programmes to universities. Government, universities, and secondary schools were, he said, then still in the stage of exploration of this “gigantic subject”.

6.2.3 Opinions of NSS LS as a Core Subject in the Public Consultations and Preparation Phase

At the beginning of the consultation period, the government coined the implementation of Liberal Studies a “unanimous positive response”, as NSS LS had been put on the agenda of Legco, thus demonstrating that the Legislative Councillors

⁹ The meaning of government varies from one context to the other. Here, Elaine talked about the function of drafting the curriculum. I infer she was referring to the Curriculum Development Council.

¹⁰ In terms of resources application and school support, it would be the function of Education Bureau

were deeply concerned about the development of NSS LS. The primary function of Legco is to enact, amend, or repeal laws in accordance with the provisions of the Basic Law and legal procedures. Legco also raises questions about the work of the Government and matters of public interest, and it is a crucial organisation for discussing political, social, and economic issues.

An extract of the minutes from one meeting of the Legco Panel on Education represents the opinions of some Legislative Councillors. They were sceptical about the readiness of the Government and the education sectors to deliver Liberal Studies as a core subject in 2009.

“[Legco]Panel Members considered that Liberal Studies should only be included as a core subject when sufficient experienced teachers were available, and appropriate pedagogies, assessment mechanisms, and support measures had been put in place. According to a survey conducted by a political party, teachers, in general, considered that the Education and Manpower Bureau had not provided sufficient professional development and support to teachers to teach Liberal Studies. Members suggested that the Administration should allow schools to teach Liberal Studies in small class” (Panel on Education for the Special Meeting on 25 May 2007:10).

“Controversy”, instead of “unanimous positive response”, is a more appropriate word to describe the general situation of the introduction of NSS LS as a core subject at that time (Scott, 2005).

“The proposal to introduce Liberal Studies as a mandatory course in secondary schools is one laudable initiative but has stirred much controversy. Some people are worried that assessment may be problematic as there are no standard answers to many questions. Others are worried over whether teachers have the competence to teach the subject, which seems to be amorphous and unwieldy” (ibid:221).

Describing NSS LS in 2005 as controversial would have been more realistic.

The first reason the Government gave for introducing Liberal Studies as a core subject was the effort it had already made in the development of school-based curriculum and curriculum integration. Under the new Education Reform advocated in 2000 by Education Bureau, schools and teachers were encouraged

“to adapt the central curriculum and develop their own school-based curriculum to help their students achieve the learning targets (knowledge, generic skills, values and attitudes) through different measures, which include varying the organisation of contents, contexts and examples, learning and teaching strategies, pace of learning and teaching, homework, criteria and modes of assessments” (CDC, 2000b:70).

In the light of the prior effort, the Government considered that the development of school-based curriculum and curriculum integration was sufficiently mature for the successful implementation of the NSS LS curriculum.

The EDB (2009) elucidated three key aims of NSS LS in the New Senior Secondary School Curriculum Liberal Studies Parents’ Handbook. The three aims are:

- “A: Awareness
to enhance their Awareness of their society, their nation, the human world, and the physical environment, as well as develop positive values;*
- B: Broadening
to Broaden their knowledge base and expand their perspectives on things; and*
- C: Connection Skills and Critical Thinking
to Connect knowledge across different disciplines and enhance their Critical thinking skills”*
(EDB, 2009: 3).

In facing an ever-changing society and knowledge-based economy, the EDB introduced Liberal Studies as a core subject under the NSS curriculum so that every student would learn how to analyse the issues happening around the societies of Hong Kong, China, and the world. These aims were broadly supported by principals,

teachers, and parents. However, the actual implementation and heavy workload perceived were main obstacles for NSS LS.

Kwok (2007), a Hong Kong pro-government scholar, argued that teachers did not need to have such great opposition; they were advised to have an open mind, to think rationally, and to adapt a new way to teach this subject. Kwok further commented that they should not distort the good intentions of the government, and damage a good initiative. Teachers were advised to learn a new way to teach this subject, adjust their attitudes, strengthen their ability and accept the new teaching environment. This was one of the few pro-government voices supporting NSS LS as a core subject.

The voices of opposition to NSS LS as a core subject were fierce. Some principals, teachers, Legco Councillors, and scholars were major opponents. Wu et al.'s survey (2007) pointed out that teachers had not come to terms with the learning and teaching paradigm shift involved in the Education Reform. The hindrances included retraining of teachers from subject-centred to school-based Liberal Studies, the wide teaching content, the shifting of teaching pedagogy from a teacher-centred to a student-centred approach, and the shift from summative to formative assessment.

The issue enquiry teaching approach, as the key learning and teaching strategy, may have given the impression to teachers that knowledge was not important. Chan (2007) argued that the teachers felt that Liberal Studies was content-free. However, interviewee Wayne stressed that use of the issue enquiry approach helped to generalise organising concepts or big ideas. Such organising concepts or big ideas are a different

form of knowledge from theories of traditional subjects. The comments by Chan and Wayne suggest that quite a number of teachers misunderstood the issue enquiry approach.

Problems also arose with the IES. 70% of the teachers did not agree to conduct the IES, due to the heavy supervision work involved and the low teacher-student ratio. A quarter of the teachers had to guide 50 to 90 students on average, which adversely affected both project quality and learning quality (Sun Daily, 2012). There were also criticisms of the wealth inequality effect. Better off families have greater pre-requisite knowledge, parental knowledge, financial support, and even tutorial support in helping the next generation to prepare for the IES. This tends to suppress the mechanism of upward social mobility, which, it was argued, is an essential asset for the growth of any advanced and vibrant society (Takung Pao, 2010).

Members of Legco, and of the public, also raised concerns about the fairness of the Liberal Studies public examinations and IES (Takung Pao, 2009) because the HKEAA did not specify a standard marking scheme. The HKEAA only provided marking guidelines. This aroused public concern and confusion over accreditation and consistency in assessments.

The economic costs of implementing Liberal Studies were high. The costs of carrying out compulsory NSS LS had been very high in terms of lesson preparation due to lack of teaching materials, time required for individual supervision of students, and increases owing to the project assessment. Lam and Cheung (2005) argued that the

curriculum objectives of NSS LS could be actualised in other subjects, drawing on Stake's Countenance Model (1967), a curriculum evaluation model that compares the congruence of intended and actual curriculum. They attempted to evaluate the NSS LS by means of whether the objectives were realised and whether the objectives synchronised prior teaching conditions and proposed teaching processes. They concluded that Liberal Studies could be carried through in other subjects at lower cost.

In the light of the above, I conclude that this initial period of consultation on Liberal Studies was controversial and did not achieve the high degree of consensus that was, apparently, perceived by the government.

6.3 Phase 2: Implementation of NSS LS (2009 to August 2014)

The public assessment of NSS LS, known as HKDSE, was the most pressing issue in second phase. Along with the internal examinations, HKDSE aroused heated debate in the education sector, the press, and Legco. Genuine implementation of the new academic structure and education reform was gradually actualised in 2009, when the first batch of students took the senior secondary school curriculum and began the three-year trial period of the new academic structure.

At the start of 2009, Liberal Studies teachers found it difficult to assess the Liberal Studies curriculum. They could not master its exact depth and breath, which led to setting of inappropriate examination questions. This problem was raised by Legislative Councillor Dr Priscilla Leung, Mei Fun.

"I have received a number of complaints, involving a number of schools.

The teachers of Liberal Studies were said to have set difficult examination questions — recently, I have looked at these questions, but I will wait until the discussion on Liberal Studies in the future to talk about the details — even a university graduate and a Member's Assistant did not know how to answer them” (Hansard 16 February 2011 Presented by Dr Priscilla Leung:5753).

The lack of model answers in marking the examination was another concern. NSS LS aims at testing the generic skills and analytical power of students, in contrast with the testing of knowledge in traditional subjects, and the teachers were not confident with this paradigm shift. This concern was fully reflected in the Panel on Education meeting on 13 June 2011.

“Members were concerned about the fairness and reliability of the public examination of LS. As the assessment of LS was based on the judgment of the markers and in the absence of uniform and transparent assessment criteria, teachers and parents were concerned about how LS examination papers would be marked and possible disputes on the assessment results. Some members commented that as the objective of LS was to develop students' critical thinking and analytical skills, merits should be given to innovative answers and personal contributions of students. Teachers should change their mentality and be more open-minded in LS assessment in order not to dampen students' creativity and interest in learning” (Panel on Education Updated background brief prepared by the Legislative Council Secretariat for the meeting on 13 June 2011:2).

At least some Legislative Councillors, it seems, remained sceptical about the actual operations of NSS public assessment in allowing consistency in marking on the one hand and creativity on the other.

From the early consultations on NSS LS until the first year of offering HKDSE in 2009, there were frequent discussions in Legco. Few subjects can catch the attention of Legislative Councillors for such a long period of time. In the following paragraphs, I highlight the main concerns of Legislative Councillors over the HKDSE Liberal

Studies programme.

During the period covered by this thesis, three live examination papers (2012, 2013, and 2014) were set by the HKEAA and attempted by the candidates. HKDSE Liberal Studies consists of two papers. Paper 1 requires the candidates to complete three compulsory data-response questions. In Paper 2, the candidates are required to choose one extended response question out of three. Table 6.4 shows the distribution of the all the questions from 2012 to 2014, according to module and respective issues.

	2012	2013	2014
P1 Q1	Hong Kong Today (ageing population)	Public Health and Globalisation (obesity)	Hong Kong Today (prosecution public order events)
P1 Q2	Public Health (tobacco control)	Hong Kong Today (filibustering in Legco)	Energy Technology and Environment (wind farms)
P1 Q3	Hong Kong Today (views on political organisations)	Personal Development and Interpersonal Relationships (role of gender)	Public health (binge drinking in Hong Kong)
P2 Q1	Hong Kong Today (development of Hong Kong transport infrastructure)	Energy Technology and Environment (solid waste problem)	Modern China (national power of China)
P2 Q2	Globalisation (Influence of MacDonald's on Chinese culture)	Hong Kong Today (citizen participation in June Fourth Candlelight movement, landing on Diaoyu Islands, donation of money for Sichuan earthquake relief)	Hong Kong Today (collective memory and social cohesion by Rubber Duck)
P2 Q3	Modern China (abuse of genetic testing in China for mother-to-be)	Modern China (ecological improvement)	Hong Kong Today and Energy Technology and Environment (light pollution)

Table 6.4: Summary of HKDSE Liberal Studies Examination Papers classified by Module and Issue (2012-2014) (Source: HKEAA) (Note: issues are indicated in parentheses)

NSS LS was not only controversial during the consultation period but also for at least the first three years of HKDSE. Attention should be drawn to the questions in Paper 1. In the *Curriculum and Assessment Guide*, there is a module called, “Hong Kong

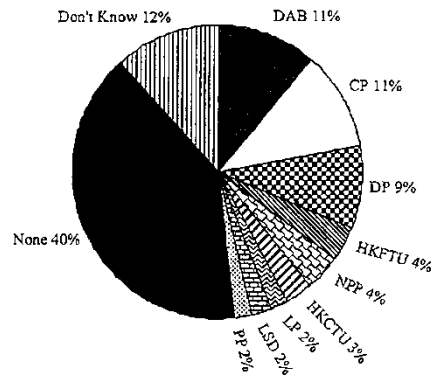
Today”. There are three themes in this module: quality of life, rule of law, and socio-political participation and identity. During the first three years there was one compulsory question set on socio-political participation and identity. The issues included the views of political organisations in 2012, filibustering of Legco in 2013, and a prosecution of public order event in 2014. All the issues set by HKEAA were very sensitive and gave rise to concerns, expressed by the Legislative Councillors and the press. The HKDSE became headline news on television and in the newspapers. In this section, I shall use the 2012 examination paper to illustrate another aspect of the controversy. Question 3 of Paper 1 is shown first in Figure 6.1.

3. Consider the following sources:

Source A Figure A1 and Table A2 show some findings from a survey conducted in April 2011 by a university in Hong Kong

Figure A1

The political organisations in the Legislative Council that Hong Kong people think can best represent or protect their interests



Keys

DAB: Democratic Alliance for the Betterment and Progress of Hong Kong
 CP: Civic Party
 DP: The Democratic Party
 HKFTU: The Hong Kong Federation of Trade Unions
 NPP: New People's Party
 HKCTU: Hong Kong Confederation of Trade Unions
 LP: Liberal Party
 LSD: League of Social Democrats
 PP: People's Power

Table A2

Hong Kong people's satisfaction with the performance of some political organisations in the Legislative Council in April 2011

Political organisation	Very dissatisfied (%)	Somewhat dissatisfied (%)	Somewhat satisfied (%)	Very satisfied (%)	Don't know (%)
DAB	16	31	34	3	16
CP	11	24	40	4	21
DP	16	32	33	2	17
HKFTU	10	24	43	2	21
NPP	6	21	37	2	34
HKCTU	15	29	37	3	16
LSD	36	27	18	2	17
PP	30	27	15	2	26

Answers written on this page will not be marked.

Source B An extract from a newspaper article

Inside the Legislative Council, the divide between the pro-establishment and the pan-democratic forces has shaped the battles over political issues. At the community level, major political organisations have succeeded in building up their groups of loyal supporters. In districts, offices run by District Council members from political organisations have played an important role in addressing residents' daily concerns on matters ranging from hygiene to bus frequency.

However, there is no denying that the growth of political organisations has lagged behind economic and social developments in the city. Political organisations are evolving at a slow pace. The two pan-democratic groups – the Democratic Party and the Civic Party – as well as the Liberal Party, have only several hundred members each. The Democratic Alliance for the Betterment and Progress of Hong Kong (DAB) has just over 20 000. All the organisations, in various degrees, face similar difficulties: lack of resources, weak policy research capacity, and a shortage of young talent. Importantly, the political organisations as a whole suffer from a negative public image.

Answers written on this page will not be marked.

Figure 6.1: Question 3 of HKDSE Liberal Studies Paper 1 - 2012 (HKEAA)

Figure 6.1 consists of two sources, A and B, for the data-response questions. Source A includes Figure A1 with a pie chart which shows people's views on of the political organisations in Legco that can best represent or protect their interest. Table A2, another component of Source A, shows the Hong Kong's people satisfaction with the

performance of some political organisations in Legco in April 2011. Source B is a newspaper extract concerning about the political parties' development in Hong Kong.

Based on the sources, three questions were asked:

- (a) According to Source A, what are the views of Hong Kong people towards the political organisations in Hong Kong? (4 marks)
 - (b) With reference to Source B, suggest and explain some possible factors that help to account for the views of Hong Kong people as identified in (a). (5 marks)
 - (c) "The presence of various political organisations in Hong Kong enhances the effectiveness of governance by the Hong Kong Government". To what extent do you agree with this statement? Explain your answer with reference to the above sources and your own knowledge. (10 marks)
- (HKEAA, 2012¹¹)

Question 3(a) asks about the views of Hong Kong people towards political organisations in Hong Kong. The answer is to be based on Figure A1 (the pie chart) and Table A2 (the Hong Kong people's satisfaction table). This sub-question tests the simple data analysis skills of candidates and is relatively objective. Question 3(b) requires the students to suggest and explain the factors affecting the views of political organisations. The students can locate the possible factors from Source B. Both Questions 3(a) and 3(b), then, are relatively closed questions and not particularly controversial.

However, the open-ended question in Question 3(c) required candidates to assess whether the presence of various political organisations in Hong Kong enhances the effectiveness of the Government's governance; it aroused heated debate in the education field as well as in Legco.

¹¹ Question 3 originated from Liberal Studies Paper 1 in 2012, the first HKDSE.

The level of difficulty was one of the concerns of Legislative Councillor Dr. Priscilla Leung, who judged that the question resembled the level of Political Science study in university. Through the discussion, she reiterated that Liberal Studies should be a subject of compulsory teaching rather than compulsory examination, and should not be a university entrance requirement.

“In this connection, I would like to draw the Secretary’s attention to the fact that students’ performance in Liberal Studies can affect their admission to university but while many students may not be suitable for studying Political Science, they may show outstanding performance in many other disciplines. Can the Secretary re-designate Liberal Studies as a compulsory subject for learning but not examination? In other words, students’ performance in this subject may not necessarily affect their choice of discipline in university” (Hansard, Presented by Dr Priscilla Leung, 9 May 2012:9231).

Legislative Councillor Mr. Wong, Yuk Man (See Appendix 6.1) briefly described the background of the question.

“Liberal Studies examination of the Hong Kong Diploma of Secondary Education (HKDSE) Examination was held on 2 April this year, and Question 3 of Paper 1 required candidates to give answers in respect of materials on party politics in Hong Kong. Quite a number of members of the press and the education sector queried that the Question was a leading question and even influenced the political stance of the candidates, and was suspected of requiring candidates to indicate their stance on political issues” (Hansard, Presented by Wong Yuk Man, 9 May 2012:9222-9223).

The main concern of Mr. Wong was whether there were guidelines, measures, or a complaint mechanism adopted by the Education Bureau to ensure that the HKEAA could maintain impartiality in relation to socio-political developments when designing examination questions for Liberal Studies. Mr. Wong’s concerns were understandable because he seems to have considered HKEAA might have pre-determined answers on people’s attitude of political parties. It was possible on this view that students favouring pan-democratic parties might score lower grades.

In the meeting, the Secretary for Education, Mr. Michael Suen, Ming Yeung (the successor of Professor Arthur Li who was previously known as the Secretary of Manpower), reiterated that the question setting was done by moderation committees jointly set up by HKEAA and CDC. Members of these committees included curriculum and assessment experts for the subjects concerned and experienced teachers from tertiary institutions and secondary schools. In setting the question concerned, the HKEAA had not considered any political considerations, he stated, adding that the public examination for this subject aimed to assess candidates' ability in applying critical thinking skills and creativity, as well as making judgments and decisions from different perspectives; and the question had no predetermined political stance or model answers.

“I have explained that political issues are involved in the examination questions set but this is exactly a requirement that we expect students to meet because students must know what is happening in society. The most important thing is whether the personal political views of the assessors responsible for marking the papers will have any bearing on their assessment, and we have set very stringent standards in this regard. The political stance of assessors will not be taken into account, and the major criterion is how well the candidates have expressed their personal views. The candidates can hold supportive or opposing views, and we have no objection to that, but they must clearly express their personal views and provide reasons to support their answers”

(Hansard, Presented by Secretary for Education, 9 May 2012:9231).

Despite the ‘political neutrality’ stressed by the Government for this question, one Legislative Councillor doubted the government feedback. Mr. Paul Tse, Wai Chun (See Appendix 6.1) queried the ‘political neutrality’ of the Secretary for Education.

“President, a Judge's judgment can reflect a position which is conservative, but it can also be avant garde. Even though the principle of political neutrality is stressed, the result can still be different. The case of examination paper assessors is just the same. While they may not purposely adopt a certain political stance, they may be under certain influences”

(Hansard, Presented by Mr. Paul Tse, 9 May 2012:9231).

On the same day, 9 May 2012, the EDB disseminated a press release through the webpage with the title ‘Liberal Studies Exam Impartial’ and stressed to the public that “the Examinations and Assessment Authority did not take into account any political considerations in setting the Diploma of Secondary Education Examination questions on Liberal Studies” (EDB, 2012).

From 2012 to 2014 the practice of setting one compulsory question covering a sensitive Hong Kong political issue HKDSE continued to be adopted by the HKEAA. The public debate about Liberal Studies has created a ‘political image’ for the public despite the announcement of the political neutrality of Liberal Studies by the Government.

Despite the keen public concern over Liberal Studies HKDSE, two key informants did not agree that NSS LS was as controversial as publicly perceived. Interviewee Thomas argued that the general public and the mass media only concerned themselves with the compulsory questions that dealt with political issues.

“Indeed, if you said that the history of Liberal Studies was rich in content. I do not think so. From 2012 to 2014, there was one respective compulsory question on the political issue in the topic Hong Kong Today. The press only emphasised and reported this question. I do not agree Liberal Studies possesses rich curriculum history in Hong Kong. In fact, I trust that the public concern has been narrow.”

(Thomas)

Wayne also agreed that the public examination of Liberal Studies allows the press to intrude into education issues more easily than other subjects.

“The media would like to find opportunities to investigate topics in education sectors. The political aspect of Liberal Studies provides golden opportunities for them to report education issues as the media trusts that this is the interesting point that capture the public.” (Wayne)

Liberal Studies was one of the few HKDSE subjects to arouse the attention of Hong Kong society. This was an unusual phenomenon for education.

6.4 Phase 3: NSS LS under the ‘Umbrella Movement’ (September 2014 to December 2014)

This section discusses the actual and potential impacts of the Umbrella Movement on the development of Liberal Studies. Before that, students had opposed the Moral and National Education curriculum (put forwarded by EDB before the Umbrella Movement), protesting and conducting hunger strike. This suggests students have been taking a more pro-active attitude on socio-political issues.

6.4.1 Moral and National Education Controversy

MCE, as discussed in Chapter 2, was one of the four key tasks in the 2001 curriculum reform undertaken by the EMB (superseded by the EDB in 2007); its framework was revised by the EDB in 2008. On 13 October 2010, Chief Executive Donald Tsang stated in his “Policy Address 2010–2011” that MNE would replace MCE to “strengthen national education”. The government planned to introduce the new subject in primary schools in 2012 and secondary schools in 2013 as a compulsory subject; it carried out a four-month consultation in 2011.

The proposal to introduce MNE aroused heated debate and fierce opposition from students, parents, teachers and scholars in Hong Kong. Opposition to MNE became intense, with public marches, a siege of government headquarters and hunger strikes beginning on 1 July 2012 and lasting until September of the same year. Meanwhile, for many local youngsters, arguably the most potent form of ‘national education’ during this period was the experience of resisting MNE itself.

Following this opposition from the public, the government, led by Chief Executive Leung C.Y., postponed the compulsory commencement of the subject but left the introduction of MNE to decisions by individual schools (New York Times, 8 September 2012).

There is little evidence showing any direct impact of Liberal Studies in inducing political movements during the Moral and National Education Controversy,. Though the students participated in the movement, their roles were not dominant. The main cause of this controversy lay in the core values and self-identity of Hong Kong citizens - in short, whether Hong Kong citizens view themselves as ‘Hong Kongers’ or ‘Chinese’. Kan (2012) noted:

“The Global Times decried ‘a few local people’s nostalgia for [the] colonial past and sense of superiority against mainlanders’ and exhorting them to ‘share in the integrity.’” (P.67)

Moreover, students, teachers and parents worried that MNE was in effect a form of indoctrination, taught with the sole objective of glorifying the mainland.

The movements in response to MNE provided a platform for the growth of student associations and coalitions. Scholarism and other groups involved in the anti-MNE coalition subsequently participated in plans to ‘Occupy Central’ and in the Umbrella Movement as part of a campaign for democratisation (Morris and Vickers, 2015).

6.4.2 The Umbrella Movement

The Umbrella Movement was a civil disobedience movement launched mainly by students, and echoed by pro-democratic citizens and pan-democratic Legislative councillors (Chan, 2014). Without doubt, various political agendas were at its core but not the sole purpose of this movement. A series of social complaints were also reflected in the Umbrella Movement, such as widening income inequality, lack of upward mobility opportunities for young people, unaffordable house prices, encroachment of Hong Kong resources by China migrants and closer ties between business élites and government. The problems have been accumulated since the return of Hong Kong to China in 1997 (Chow, 2015).

Although it made several demands, the main goal of the Umbrella Movement was to demand genuine universal suffrage of elections for the Legislative Council (Legco) in 2016 and for the election of Hong Kong’s Chief Executive in 2017. The chief divergence between pan-democratic students, other citizens and groups, and pro-establishment / pro-Beijing supporters lay in their interpretation of universal suffrage. The concept of universal suffrage of the Chief Executive and Legislative

Council is clearly set out in Article 45¹² and Article 68¹³ of Hong Kong's Basic Law respectively. However, pan-democratic parties have different viewpoints with government and pro-establishment parties. In fighting for the universal suffrage, the pan-democratic parties took active role in the Umbrella Movement.

Pro-democratic groups¹⁴ have been fighting for 'genuine' universal suffrage for both Chief Executive and Legco elections. Their original target was to achieve it in 2007-8; this was then moved to 2012 when the 2007 target was not achieved. In 2007, the National People's Congress again refused the demand to implement universal suffrage in 2012, but raised the hope that the Chief Executive would be elected by universal suffrage in 2017, to be followed by the Legco election later (Fightback the Marxist Voice of Labour and Youth, 29 September 2014). Pan-democratic groups take the view that Hong Kong citizens should be able to vote for their preferred candidate as specified in Article 45 of the Basic Law.

¹² Article 45 stipulates the method of selection for the Chief Executive of Hong Kong after the return of Hong Kong to China.

"The Chief Executive of the Hong Kong Special Administrative Region shall be selected by election or through consultations held locally and be appointed by the Central People's Government of the actual situation in the Hong Kong Special Administrative Region and in accordance with the principle of gradual and orderly progress. The ultimate aim is the selection of the Chief Executive by universal suffrage upon nomination by a broadly representative nominating committee in accordance with democratic procedures". (Article 45, Basic Law)

¹³ Article 68 articulates the pathway of universal suffrage within the Hong Kong Legislative Council.

"The method for forming the Legislative Council shall be specified in the light of the actual situation in the Hong Kong Special Administrative Region and in accordance with the principle of gradual and orderly progress. The ultimate aim is the election of all the members of the Legislative Council by universal suffrage". (Article 68, Basic Law)

¹⁴ Hong Kong's unique political axis divides parties along pro-Beijing /pro-establishment and pro-democracy lines that place the Democratic Alliance of Betterment and the Liberal Party on the former with the Democratic Party and Civic Party along the latter. At the same time, labour unions that function as parties, a handful of smaller "pressure groups" and independents all figure prominently in this picture. (Chung, 2005) This has become more complicated after the Umbrella Movement. Political parties proclaiming Hong Kong independence, such as Hong Kong Indigenous, Youngspiration and the Hong Kong National Party, have arisen. However, in this thesis, the dichotomy approach to political parties is used since this approach is valid in explaining the ecology of political parties of Hong Kong until 2014.

On 31 August 2014, after the receiving the Hong Kong Government's political consultation process report, the National People's Congress Standing Committee announced three final decisions regarding the 2017 Chief Executive Election. (HKSAR Government, 2013). This is known as '831 Decision':

- “(1) Only the nomination committee has the power to nominate the candidates for Chief Executive. The composition, the number of members, and the method of formation of the nomination committee for 2017 will be the same as for the Election Committee in 2012.*
- (2) In order to become a candidate for the position of ‘Chief Executive’, one must have support from over half of the members of the nomination committee.*
- (3) The maximum number of candidates that may be nominated for the Chief Executive position by the nomination committee is three persons.”*
(South China Morning Post, 31 August 2014)

The '831 Decision' went against the hopes of pro-democratic parties as the National People's Congress Standing Committee put forward the plan of 'universal suffrage' with screening of candidates by a nomination committee. Many Hong Kong citizens felt that universal suffrage would be in vain because the nomination committee would likely be controlled by China. Even though citizens would be able to cast a vote, they could only vote for candidates screened by the Chinese Government. A 'Representative Nomination Committee' screens the Chief Executive candidates according to abstract principles set by the Chinese Government: candidates must 'love country and love Hong Kong'¹⁵. As these criteria are not specified in the Basic Law, it is hard for many Hong Kong citizens to accept them because Hong Kong citizens have become used to the 'rule of law'. In the post-colonial period, 'rule of law' remains an important element of Hong Kong's governance. It is clearly defined by the Hong Kong

¹⁵ Wang Guangya, Director of the State Council's Hong Kong and Macau Affairs Office, added one more criterion for Hong Kong's 2017 Chief Executive: he or she must be someone the central government can trust in 2012. He suggested the Chief Executive must possess three qualities: to love the country and love Hong Kong, be able to win the support of Hong Kong people, and be capable of governing. (South China Morning Post, 30 December 2016)

Department of Justice:

“The ‘rule of law’ refers to ‘some of the fundamental principles of law that govern the way in which power is exercised in Hong Kong. The rule of law has several different meanings and corollaries. Its principal meaning is that the power of the government and all of its servants shall be derived from law as expressed in legislation and the judicial decisions made by independent courts. At the heart of Hong Kong’s system of government lays the principle that no one, including the Chief Executive, can do an act which would otherwise constitute a legal wrong or affect a person’s liberty unless he can point to a legal justification for that action.” (Department of Justice, Hong Kong, 2017 – accessed on 19 June 2017)

According to the rule of law, therefore, Hong Kong citizens are subject to laws explicitly written and court decisions based on these written laws, together with principles derived from the English common law. Thus, the additional criteria stipulated by China on the constitutional development and the spirit of the ‘rule of law’ as stated by the Hong Kong Government are not in harmony. This has brought about confusion and controversy about the concept of ‘rule of law’. Many Hong Kong citizens have little real hope of achieving genuine universal suffrage through the ‘rule of law’; this may explain their breaking the law in order to pursue their dream of universal suffrage, which is the aim of the civil disobedience undertaken by the Umbrella Movement. The Umbrella Movement brought further controversy and confusion to understandings of the ‘rule of law’.

Chan (2014), a former Dean of the Faculty of Law of the University of Hong Kong (HKU), raised three main questions regarding the ‘broadly representative’ nomination committee. What is a ‘broadly representative’ nomination committee? What constitutes a democratic process? Can nominations be made other than by the nomination committee? Professor Chan was not the only person to consider these three

questions; they have also been considered, albeit less formally, by the majority of Hong Kong citizens.

Dissatisfaction continued to build up in Hong Kong after '831' decision. The failure to achieve genuine universal suffrage became a central cause of the Umbrella Movement. In late September 2014, both secondary school and post-secondary school students represented by Scholarism¹⁶ and the Hong Kong Federation of Students¹⁷ started a class boycott.

Occupy Central was sparked off by a small-scale occupation of Civic Square at Government Headquarters, initiated by Scholarism and the Hong Kong Federation of Students on the night of 27 September 2014. Secondary school students, university students, and student leaders were arrested and detained overnight. In the wake of the student occupation of Civic Square, Professor Benny Tai, Yiu Ting (a law professor from the University of Hong Kong), Professor Chan, Kin Man (a sociology professor from the Chinese University of Hong Kong), and pastor Chu, Yiu Man formally announced the commencement of 'Occupy Central', a movement with 'Love and Peace', in the morning of 28 September 2014. This movement became known as the Umbrella Movement, named after the use of umbrellas by the protesters to shield

¹⁶ Scholarism was formed by a group of post-90s students on 29 May 2011 in response to the introduction of Moral and National Education of Hong Kong government. Through the social movement, Scholarism successfully delayed the implementation of Moral and National Education. This group of post-90s students continues monitoring the introduction of Moral and National Education, constitutional development of Hong Kong and Hong Kong government policy.

¹⁷ The Hong Kong Federation of Students (HKFS) is a student organisation founded in May 1958 by the students' unions of higher education institutions. Now, HKFS comprises students' unions from four institutions: the Chinese University of Hong Kong, Lingnan University, Shue Yan University and the University of Science and Technology. The purpose of the HKFS is to unite and represent the tertiary students in a friendly and cooperative spirit. It aims at promoting cultural and academic activities among students, improving students' welfare and mutual understanding increasing social awareness and building relationships with foreign students. (<https://www.hkfs.org.hk/> - accessed on 31 March 2017)

themselves from pepper spray and tear gas used by Hong Kong police:

“Since 28 September 2014, thousands of protesters have occupied the main thoroughfares of Hong Kong [Central, Admiralty, Causeway Bay, Wanchai and Mongkok] and pressed demands for a genuine elective of the Chief Executive of the Hong Kong Special Administrative Region in 2017. The police initially responded with tear gas, to which the protesters defended themselves with umbrellas, hence giving the movement its popular name – ‘Umbrella Movement’. The occupation lasted for 79 days and was eventually cleared by Hong Kong police in December the same year.”

(Chan, 2014:571)

Before the Umbrella Movement, Chiu (2010) explored students’ role in social movements. His findings contradict the belief of ‘pro-establishment’ and ‘pro-Beijing’ politicians viewing a direct cause and effect relationship between Liberal Studies teaching in schools and the Umbrella Movement, claiming that Liberal Studies has been raising the social awareness of students and leading to the rise of this movement.

Pro-establishment Legislative councillor Dr. Priscilla Leung, Mei-fun asserted that the Liberal Studies curriculum played an active role in causing the Umbrella Movement:

“There’s always been a level of criticism from pro-Beijing politicians. But the political climate in Hong Kong has become a minefield, more so since the Umbrella Movement in December 2014. Priscilla Leung, a hitherto pro-Liberal Studies Hong Kong Lawmaker, argues that while the subject [Liberal Studies] equips Hong Kong youth with an awareness of the issues, the youth lack the necessary maturity and awareness to participate meaningfully in politics. It has also been said that many Liberal Studies teachers have used the subject to advocate their own [often times anti-Beijing] political beliefs, which defeats the diversity-orientated and balanced approach the curriculum preaches. That may well be true since quite a number of Liberal Studies teachers were said to have participated in the Umbrella Movement.” (South China Morning Post, 13 February 2015)

Dr Leung’s viewpoint was reflective of her pro-establishment orientation and intention to use the Umbrella Movement to show her support for the Beijing Government and to

put forward her idea of how future Liberal Studies curricula should be shaped by politicians.

The debate quickly spread from the press to the Legco Chamber. Mr. Ip, Kin Yuen, pro-democratic Legislative councillor for Education, expressed concern about the potential change of curriculum content of Liberal Studies due to the Umbrella Movement, such as the reduction in political content and an increase in the Basic Law content.

“Recently, there have been public comments that the encouragement of students to discuss Hong Kong people’s participation in socio-political affairs by the teaching and learning activities under the theme of “rule of law and socio-political participation” in the Liberal Studies subject of the New Senior Secondary Academic Structure is one of the causes for the massive turnouts of secondary students in the “occupation” movement. There have also been press reports that the Government intends to amend the Liberal Studies curriculum to delete topics relating to the politics of Hong Kong and beef up the contents in areas such as the Basic Law. Some educational bodies consider that such a move is tantamount to political intervention in educational affairs.” (20 November 2014, Written Request of Legislative councillor Mr. Ip, Kin Yuen)

In relation to the Umbrella Movement, I draw the following three conclusions to substantiate the argument that any curriculum is constructed in, and interacts with, a socio-political environment and that this argument is applicable in the case of Liberal Studies in Hong Kong.

First, in the Liberal Studies curriculum, socio-political participation has been included in the module on ‘Hong Kong Today’. Core concepts like respect for the rule of law, participation, human rights and responsibilities; democracy and justice are covered (CDC and HKEAA, 2007 and 2014). Looking at the content of this module, it was

easy for outsiders who knew little of the detail of the Liberal Studies curriculum to draw a simple cause-and-effect relationship between Liberal Studies and participation in the Umbrella Movement. The views of outsiders may have influenced the development of Liberal Studies; this is less common in other subjects.

Second, Liberal Studies has nurtured and encouraged students to read newspapers, to keep up to date with both local current affairs in Hong Kong and to expand their horizons to include China and the rest of the world. Hong Kong's Education Bureau (EDB) expected the students to become more socially aware. Ironically, the rise in their social awareness is now criticised as a cause of the students' participation of the Umbrella Movement.

Third, Liberal Studies can be seen as an arena of political struggle in Hong Kong during the Umbrella Movement and was blamed as its cause. Up to now, Liberal Studies has been the most politicised of New Senior Subject (NSS)¹⁸ subjects. It has generated headlines in both the Chinese and the English press, leading to Legco scrutiny and debate. Although the Umbrella Movement has ended, it has had a lasting impact on Liberal Studies in Hong Kong.

The latest criticism was voiced by Mrs. Rita Fan, Hsu Lai-tai, a former Legco president and the city's only representative on the Standing Committee of the National People's Congress. In a television interview, she said politically biased teachers were

¹⁸ During the early implementation of the new senior secondary academic structure, the term new senior secondary (NSS) was used. However, in recent years, senior secondary has been used to replace NSS. In this thesis, I refer to the period from 2009 to 2014; therefore, the term 'NSS' is still employed.

spreading anti-China views and hate against the communist state via liberal studies. “It is not related to the Communist Party ... It is related to liberal studies,” Fan said. Mrs. Fan is an informal spokesman of the Chinese government; however, she is a prominent figure in Hong Kong and well-liked by the Chinese government. She likely conveyed a strong message on the Chinese government’s opposition stance of Liberal Studies (South China Morning Post, 10 August 2017). Hence, the changing socio-political environment within which Liberal Studies has been constructed provides clues for interpreting its development and history.

The ad hoc Umbrella Movement that took place from 28 September 2014 for 79 days shocked Hong Kong society and many overseas, and potentially changed the future pathway of Liberal Studies development. A further unexpected reaction was the heated debate over the role of NSS LS in causing the Umbrella Movement. In this section, I explore the nature of the cause-effect relationship (if any) between Liberal Studies and the Movement. The implications for the future direction of Liberal Studies are explored.

In the wake of the Umbrella Movement, former government officials and pro-establishment Legislative Councillors reversed their previous position, now correlating Liberal Studies with the occurrence of the Umbrella Movement. The former Permanent Secretary for Education Mrs. Fanny Law, and pro-establishment Legislative Councillors Mrs. Regina Ip and Dr. Priscilla Leung asserted that Liberal Studies encouraged students to participate in the Umbrella Movement.

Mrs. Fanny Law, the former Permanent Secretary of Hong Kong's EDB and an Executive Council member, joined those speaking against Liberal Studies. In an interview with broadcaster Radio Television Hong Kong, Law lamented that Liberal Studies, a subject designed to encourage independent thinking, had deviated from its original purpose, and focused on politics instead. (Foreign Policy, 18 November 2014). Ironically, as we have seen, she had advocated making Liberal Studies a mandatory subject during her tenure as Permanent Secretary of EDB from 2002 to 2006.

One of my informants, Nancy, suggested that Mrs. Fanny Law's speech did not intend to uproot Liberal Studies; instead, she wanted the subject to develop in a healthy, balanced and less politicised way.

"I can see that Mrs. Fanny Law observed that some schools focused too much in political issues and she wanted the study to develop in more balanced way. Mrs. Law did not give up her baby [Liberal Studies] but wanted the baby to grow in a good form."
(Nancy)

Legislative Councillor Dr Priscilla Leung had been absolutely opposed to Liberal Studies since its consultation stage. She criticised teachers for taking advantage of discussions during Liberal Studies lessons on current issues. In her view, they were using their classrooms to mobilise students to the streets, and they were encouraging students to participate in the social movement. She claimed, "The possible connection" between the Movement and the subject "lies in the fact that there were many secondary school teachers supportive of the protest" (Foreign Policy, 18 November 2014).

Another Legislative Councillor, Mrs. Regina Ip, said she had discussed Liberal Studies with the CDC and found it wanting. Ip told the press, “The chairman of subject committee, an academic himself, said that too much revolves around current affairs” (ibid).

The common message of Mrs. Fanny Law, Dr. Priscilla Leung, and Mrs. Regina Ip gave the public a strong feeling that Liberal Studies was too politicised and hence had provoked students’ participation on the Umbrella Movement (Ho, 2014). Chiu and Lee further explained how and why the relationship was established.

“Liberal Studies became part of the curriculum in 2009. Since, then, it has been blamed for opening the floodgates, allowing radical ideas into the classrooms, and prompting students to take their views to the street. Among its six modules, Hong Kong Today covers the topical issues concerning citizenship, identity, rule of law and socio-political participation” (South China Morning Post, 19 April 2015).

The speeches of these pro-establishment representatives give us a strong impression that the Umbrella Movement has changed the attitude of the HKSAR Government (or perhaps of the Central Chinese Government) on the role of Liberal Studies. Liberal Studies was regarded by the Government’s conservative allies as one of the causes of the Umbrella Movement. The sight of so many students on the barricades reopened debate about the role of education in politics and society, a debate that is central to questions of democracy and Hong Kong’s place within China.

Mr. Ip, Kin Yuen (See Appendix 6.1), Legislative Councillor of Education, asked the EDB about the future development of Liberal Studies in a Legco meeting that took place during the Umbrella Movement.

“Recently, there have been public comments that the encouragement of students to discuss Hong Kong people’s participation in socio-political affairs by the teaching and learning activities under the theme of ‘rule of law and socio-political participation’ in the Liberal Studies subject of the New Senior Secondary Academic Structure is one of the causes for the massive turnouts of secondary students in the ‘occupation’ movement. There have also been press reports that the Government intends to amend the LS curriculum to delete topics relating to the politics of Hong Kong and beef up the contents in areas such as the Basic Law. Some educational bodies consider that such a move is tantamount to political intervention in educational affairs” (Panel of Education, Ip, Kin Yuen, 20 November 2014).

Mr. Ip’s enquiry was not groundless. In the press, many conservative parties commented negatively on Liberal Studies. There was a rumour during the Umbrella Movement that the HKSAR government might clamp down on Liberal Studies. The EDB offered a slew of suggestions to change the curriculum, including reducing the portion of the curriculum discussing local politics, increasing the focus on Hong Kong’s governing Basic Law and the concept of ‘one country’ — both of which Beijing would presumably applaud — and offering the subject as an elective, rather than a compulsory module.

The HKSAR Government has generally adopted a supportive attitude in maintaining the core status of Liberal Studies. Despite controversy, Liberal Studies was implemented in 2009 for the first batch of F4 students and in 2012 for the first HKDSE. However, at the same time, the political atmosphere of Hong Kong has become more politicised. The relationship between Legco and Exco has become tense.

Pro-establishment and pan-democratic Legislative Councillors usually have contrasting opinions. Society has become divided. With fewer seats in Legco, extreme pan-democratic Legislative Councillors often employ filibustering techniques to delay budget approval and government policy proposals.

Bertolinin (2015) saw the tragedy of the Movement in its further dividing of society:

“The protesters in the streets were overwhelmingly young and well-educated, and I do not see how they could hope to bring their transformative project on further without engaging with their older or less educated fellow citizens.” (p.5)

Liberal Studies students’ participation in the Umbrella Movement provides a simple and at first sight plausible explanation of the phenomenon; nonetheless, there are alternative reasons and arguments.

Certain interviewees opposed the removal of Liberal Studies from the compulsory curriculum because of the Umbrella Movement. They pointed out several logical fallacies and practical considerations. Interviewee Thomas stressed that Liberal Studies increases the exposure of senior secondary school students to current affairs but argued that this subject does not necessarily force the students to take a side.

“Without doubt, Liberal Studies definitely increases the social awareness of students. Liberal Studies also taught students to think critically and logically. However, it does not mean that they are taught to support occupiers. On the contrary, the students can support the blue ribbon [the side of police].” (Thomas)

Thomas added that Liberal Studies educates students to think from multiple perspectives, rationally, critically and to establish their own values and stance. It is, he

said, ridiculous to criticise this subject as adopting a single perspective by supporting the Umbrella Movement.

Nancy argued that most of participants in the movement did not study Liberal Studies. It was unfair to draw a simple relationship between Liberal Studies and the Umbrella Movement.

“Chow Wing Hong [Chairman of Hong Kong Federation Association of Students, student leader of occupation movement] did not study Liberal Studies but Wong Chi Fung did [Convener of Scholarism]. Students who studied Liberal Studies reach Year 3 of University. This movement involves more people older than Year 3 of University. In terms of percentage involving in the Umbrella Movement, majority participants do not attend Liberal Studies courses. The linkage between Umbrella Movement and Liberal Studies is weak. Liberal Studies is a scapegoat. It refutes the hypothetical relationship between social movement and curriculum. The Umbrella Movement overlaps with the medium-term review. This is a platform for the political struggle between pan-democratic parties and pro-establishment parties.” (Nancy)

Chan (2015) shared a very similar viewpoint with informant Nancy. He pointed out that students have been playing a vital role in social movements across space and time. However, even under a de-politicised curriculum, social movements around events such as the Golden Jubilee Incident in 1978¹⁹ and the 4 June Incident in 1989²⁰ came into existence. Liberal Studies should not take the blame.

“Historical events ranging from Golden Jubilee Incident in 1978 to the 4 June Incident in 1989, from anti-national education movement in 2012 to the Umbrella Movement in 2014 have highlighted the importance of student’s role in social movement.” (p.2)

¹⁹ St. Teresa Secondary School’s indirect predecessor was the Precious Blood Golden Jubilee Secondary School, which was administered by the Sisters of the Precious Blood. In 1977, due to misuse of school funds and suspected corruption, some teachers contacted the Independent Commission Against Corruption and informed the students. It was followed by a series of student protests and sit-ins, and eventually the closure of the school on 14 May 1978. St. Teresa Secondary School was opened on its former site, with the protestors initiating the secular Ng Yuk Secondary School.

²⁰ June Fourth incident, also called Tiananmen Square incident, refers to a series of protests and demonstrations in China in the spring of 1989 that culminated on the nights of 3 and 4 June with a government crackdown on the demonstrators in Tiananmen Square in Beijing.

Nancy pointed out that many of students participating the Umbrella Movement had not taken Liberal Studies. Chan (2015) has pointed to the importance the role of students in social movements. However, the examples of Golden Jubilee and 4 June Incidents suggest that social movements do not necessarily correspond to particular subjects.

Kevin and Karst shared very similar viewpoints but with alternative grounds. Dissatisfaction with the Chinese and Hong Kong governments had already become a feature of the post-colonial period. The Umbrella Movement was simply another outlet for these emotions.

“It seems that eradicating Liberal Studies is to evade the dissatisfaction of China and Hong Kong government. If so, it is illogical. By understanding political systems of Hong Kong and China, the sense of dissatisfaction comes into existence. Even without this subject, the reality exists. It is a matter of how do you organise the curriculum instead of a total ban.”

(Kevin)

Karst believed that even without Liberal Studies, students could easily access current debates about issues by going on-line. Internet technology offers a wealth of avenues to explore any issue. In this sense, Karst believed that a ban on the use of Facebook would be more effective in suppressing social movements than a ban on Liberal Studies.

“Even without Liberal Studies, the students can expose to the media through Facebook. The opinions in Facebook can be more extreme.”

(Karst)

I infer Karst did not really advocate to ban Facebook but was offering an analogy by saying that phasing out Liberal Studies was illogical.

Fung and Su (2016) argue that use of force by the police was a catalyst during the Umbrella Movement.

“Such direct drivers of participation as the police’s use of excessive force and the perceived erosion of Hong Kong’s civic values appear to explain students’ decision to join the Movement to a greater extent than the study of Liberal Studies.” (p.98)

The Umbrella Movement, with the slogan ‘Love and Peace’, was fully broadcast. The protestors never used weapons in any forms of violence. The police stepped up the level of force, moving from pepper sprays to tear gas to disperse the protesters and the scene was broadcast in real-time on all television channels in Hong Kong. The citizens never gave up their ideal of ‘Love and Peace’, and used the humble umbrella to protect themselves. The live feed of unarmed students, with only umbrellas for protection being fired upon with tear-gas by armed police provoked other Hong Kong citizens to protest, even if they were not taking Liberal Studies.

6.5 Chapter Summary

This chapter has presented three phases of NSS LS: Phase 1: preparation and consultation, Phase 2: implementation, and Phase 3: implementation during the Umbrella Movement. Throughout the period, NSS LS developed in political climate. Various issues of public debate were encountered in phases 1 and 2 such as the need for Liberal Studies, the length and breadth of the curriculum, pressures exerted on teachers, and the objectivity of the assessments. Despite opposition, the government still insisted on introducing NSS as a compulsory subject for entry to university.

During the Umbrella Movement from September 2014, the political situation changed

drastically. The social movement longed for genuine universal suffrage in Hong Kong. Liberal Studies students were criticised as leaders of and participants in this movement. This marked an abrupt change in government attitudes to this subject.

In the medium-term review (2015), the Liberal Studies contract was renewed for five more years. Within these five years, Liberal Studies will experience a tug-of-war between pro-Chinese and pan-democratic forces. The history of Liberal Studies has been guided not only by the education profession but also by political agendas; this seems likely to continue.

The Umbrella Movement has generated significant uncertainties about the future of Liberal Studies. Will Liberal Studies be abandoned? Will it be preserved, but only as an elective subject? Will it be preserved, but with significant changes to the content of the curriculum? We do not attempt to resolve these questions here, but it is clear they will be very much on the agenda in the years ahead.

Chapter Seven

Factors Shaping Liberal Studies

7.1 Introduction

As mentioned in Chapters five and six, international (world system theory), regional (colonialism and decolonisation), and local (different stakeholders) factors have been used to explain the shaping of ASL LS to NSS LS. As mentioned in Chapter three, all have shaped the development of Liberal Studies, though to varying degrees. The individual factors at each level shaping the curriculum will be examined here to lay the groundwork for further analysis of these factors in this chapter.

7.2 International Level Factors Shaping the History of Liberal Studies (World System Theory)

World system theory suggests that the curriculum of a place usually follows the national education of Western countries. World system theory can partly be applied to explain the curriculum history of Liberal Studies in Hong Kong. For instance, globalisation and the curriculum approach of the Science/Technology/Society (STS) movement (as mentioned by Wayne and David in Chapter 5) influenced the development of Liberal Studies. Development of Liberal Studies has been coinciding with globalisation. However, world system theory provides only a partial explanation on how Liberal Studies was developed because Liberal Studies is developed within the local context of Hong Kong, though borrowing western the curriculum approach and teaching pedagogy.

World system theory is closely associated with globalisation. Although there are competing views at its simplest as the accelerated movement of goods, services, capital, people, and ideas across national borders, the influence of globalisation on human society is political, social, and cultural. The boundaries of nation states become blurred and homogeneous. However, it should be borne in mind that globalisation is hardly a new concept and was already common in the late 20th century (Held et al., 1999). As Waters (1995) declared, globalisation was apparent in the 1990s, and the term, ‘globalisation’ began to be used as early as the 1960s. It still lacks a precise and uncontested definition (Kellner, 1998 as cited in Rui, 2003). Despite this, globalisation helps to explain the part of the curriculum content and curriculum approaches from ASL LS to NSS LS.

7.2.1 Influences of Globalisation

Both ASL LS and NSS LS were the result of education reforms. ASL LS was produced as a direct result of the *Llewellyn Report* (Visiting Panel, 1982). This Report saw that the Hong Kong matriculation curriculum too specific and the students took only few subjects. The *Education Commission Report 2* therefore put forward ASL LS with the prime objective to broaden the range of issues to which students were exposed (Education Commission, 1986). These objectives were also stated in the ASL LS syllabus:

“This subject aims to broaden the horizons and skills of Secondary 6 and 7 subjects by having them study areas outside the traditional Advanced Level subjects, to increase students’ awareness of themselves, and to engender a critical awareness of the society in which they live and the way that society relates to an ever-changing world.”
(CDC, 2000a:7)

NSS LS was offered as a part of the territory-wide education reform by the First Chief Executive, Mr. Tung, Chee Hwa. The CDC (2000b) issued the document *Learning to Learn the Way Forward in Curriculum Development: Consultation Document*. This publication acted as a milestone of the education reform in Hong Kong with the ultimate goal of fostering the whole-person development of adolescents.

“To enable every person to attain all-round development in the domains of ethics, intellect, physique, social skills and aesthetics according to his/her own attributes so that he/she is capable of life-long learning, critical and exploratory thinking, innovating and adapting to change; filled with self-confidence and a team spirit; willing to put forward continuing effort for the prosperity, progress, freedom and democracy of their society and contribute to the future and well-being of the nation and the world at large.”

(ibid:4)

NSS LS serves as a subject connecting all other Key Learning Areas (KLAs) in order to enhance the all-round development of students during the three-year senior secondary school learning experience. One of the objectives of the Tung Government’s Education Reform was to prepare the students to face the changes brought about by globalisation. Therefore, NSS LS also shouldered part of the responsibility to equip citizens to face the challenges of globalisation.

One of the overall stated objectives of ASL LS was to “encourage students to become better informed, interested in, and concerned for Hong Kong and the wider world...” (CDC, 2000a: 8). We can find many global issues in three out of six modules of ASL LS, namely, the Modern World, Science, Technology and Society, and Environmental Studies. The Modern World explores the recent history of great powers, military,

political, and economic groupings (especially the role of the United Nations), and the roles of developed countries and developing countries. (ibid, 51-65)

Some global issues were also used to form the content of the Science, Technology and Society, and Environmental Studies modules. In Science, Technology, and Society, issues such as information technology and medical technology were studied, (ibid, 66-75) whereas global warming and different types of pollution were covered in the Environmental Studies module (ibid, 30-50). The Modern World in ASL LS adopted a more subject approach of History to explore the issues of political power, and the Cold War concept of balance of power and military, political, and economic groupings. This reveals how world system theory provides a key to understanding the curriculum development.

However, as mentioned in Chapter 5, the students were required to study two modules chosen by the teachers. The popular choices amongst Liberal Studies teachers were Hong Kong Studies and Environmental Studies, with the Modern World being the least popular. The choice of modules, without doubt, suggests world system theory provides only a partial explanation of ASL LS developments. In other words, Liberal Studies differs from the Liberal Education in western countries.

For NSS LS, the remaining three modules (Globalisation, Public Health and Energy, and Technology and the Environment) contain substantial learning issues for students' understanding of the world.

“‘Globalisation’ has become a buzzword, but it remains controversial as a

concept and developmental trend. Some people even strongly argue for 'anti-globalisation'. There is without doubt an increase in cross-border activity, real and virtual. Physical distance no longer restricts the interflow and mutual influences of people. Students' daily lives are linked with globalisation: they are constantly exposed to international events through live electronic transmission; they consume goods and services of global brands; and they habitually surf the electronic world. As the mainland is engaging in reform and opening-up, and Hong Kong is an international financial and logistics centre, the opportunities and challenges of globalisation are obvious. However, across the world, people's experience of globalisation varies from one country to another and within countries".

(CDC and HKEAA, 2014:40)

Local scholars further argued that NSS LS represented an attempt for students to aim for the goal of global citizenship, rather than a global education in itself.²¹ However, whether NSS LS targeted global citizenship or global education is debatable.

"Module 5 is Public Health. In this module, students examine the spread of diseases and health problems in the population, and their determining factors. The module also discusses the major health problems that have had the greatest impact on our community and their causes; and the place of science and technology in dealing with related problems. The roles of the individual and society in maintaining good public health and handling possible public health crises are also explored."

"Module 6 is Energy Technology and the Environment. It seeks to analyse how we use energy, and discuss how this has a significant impact on our lives and environment, and how the development of energy technology relates to sustainable development. The module aims to develop a comprehensive understanding of the implications of the use of energy on society and the environment and an awareness of how science and technology affects our lives." (ibid: 43)

Public health and environmental problems are international issues causing widespread implications on the planet and all its inhabitants. In the recent history of the human world, Severe Acute Respiratory Syndrome (SARS), Ebola and Middle East Respiratory Syndrome have easily spread from one country to another due to

²¹ Global citizenship suggests at global civic engagement, but global education aims to develop a greater understanding of the world

increasing flows of people (World Health Organisation, 2016). In 2003, the mortality of SARS victims in Hong Kong was 299 people. Environmental problems such as global warming, air pollution, and water pollution, are transboundary in nature. Both Public Health and Environmental Problems are global issues. The NSS LS students study all six modules in order to enable them to better integrate the topics from local to the world in a more coherent way.

7.2.2 The Influence of the Science/Technology/Society Movement

Another influence on ASL LS and NSS LS was the Science/Technology/Society (STS) Movement, which originated in the United States (Yager, 1990a). STS is an interdisciplinary field of study that seeks to explore and understand the many ways that modern science and technology shape modern culture, values, and institutions, on one hand, and how modern values shape science and technology, on the other. Ziman (1980) identified STS as a type of curriculum approach designed to make traditional concepts and processes found in typical science and social studies programmes more appropriate and relevant to the lives of students. Yager (1990b) defined the STS movement as an integrated approach to science teaching, while, Wraga and Hlebowitsh (1991) saw STS as a topical curriculum that addresses a broad range of environmental, industrial, technological, social, and political problems. The major conceptual contribution of the STS movement is to stress learning and teaching that has a profound reference to the human world, rather than teaching pure science.

Two interviewees, Wayne and David, admitted that the topic of Science, Technology and Society, and Environmental Studies in ASL LS, and the subject of Energy,

Technology, and the Environment in NSS LS, are influenced by the STS movement.

“Have you heard about Science/Technology/Society movement? In traditional approach to science subjects, we learn only the theories such as optics in Physics and bonding in Chemistry. In other words, we focus on pure science. In Liberal Studies, the modules, Science, Technology and Society, and Environmental Studies in ASL LS and the Energy, Technology and Environment in NSS LS, we put the science questions in the human world as in social, political and economic contexts.” (Wayne)

Wayne further substantiated the importance of the STS movement by referring to the curriculum objectives of Liberal Studies

“To enable students to see in perspective the impact of science and technology on the world environment and on every aspect of our lives.”

Aims of Science, Technology and Society of ASL LS (CDC, 2000a:66)

“To enable students to better understand the interdependence of all living things and the delicate nature of the balance between them...”

One of the Aims of Environmental Studies ASL LS (CDC, 2000a:30)

“In this module [Energy, Technology and the Environment], students will be asked to evaluate issues concerning energy technology and the environment from a variety of perspectives, informed by scientific, technological, environmental, historical, social and cultural data. They will develop an awareness of the complex interrelationships and interdependencies involved. It is hoped that recognition of the impact of science and technology on our lives will lead to empathy for living things, a love of the environment, an understanding of the need for sustainable development for our society, country and the world, and the nurturing of responsible global citizenship.”

Aim of Energy, Technology, and the Environment as stated in the Prologue of NSS LS Curriculum and Assessment Guide (CDC, 2014:51).

David also confessed, “They deliberately chose scientific issues that are related to society for the students to study, such as renewable energy, biotechnology, smog, and global warming, which caused noticeable impacts on society”. World system theory

definitely provides valuable insight into the shaping of the Liberal Studies curricula.

7.3 Regional Level Factors Shaping the History of Liberal Studies

7.3.1 Background of Colonialism and the General Impacts on Curriculum Change in Hong Kong

Hong Kong was ceded as a colony of the United Kingdom after the British defeat of China in the First Opium War. On 1 July 1997, Hong Kong became a Special Administrative Region of the People's Republic of China, rather than an independent state (Law, 1997). Under the previously untested formula of 'one country, two systems', Hong Kong was promised autonomy (except for military defence and diplomacy) in government by Hong Kong people and the maintenance of its capitalist economy, social system, and way of life for at least 50 years without compulsory convergence to China's socialist system (Deng, 1993a, 1993b).

The original motive for the United Kingdom to capture Hong Kong was to establish a military and geographical base in the Far East rather than for settlement (Bray and Lee, 1993). As mentioned in Chapter three, education historians have described the curriculum from 1842 to 1970 as an apolitical, a-national, alienated and decontextualised (Choi, 1997, Lo, 2004a, Sweeting and Morris, 1993, Morris and Chan, 1997a; and Kan, 2010), with education mainly confined to the elite (Kennedy, 2005). The curriculum was arranged according to academic rationalism, focusing on the knowledge, skills, and values derived from the academic disciplines; this promoted rote memorisation (Morris, 1995).

Decolonisation changed the history of Hong Kong education. Nonetheless, academics

have different interpretations of its impact on curriculum development. Some education historians correlated it with the shift from an apolitical curriculum to a more politicised curriculum during the post-colonial period (Chan et al., 2005). Others have considered that the Sino-British Joint Declaration in 1984 by bringing in reforms 13 years earlier than the post-colonial period in 1997 (Choi 1997, Morris and Chan, 1997a, Sweeting and Morris, 1993; Morris, 1995, Adamson and Morris, 2000). On this view, the origins of the education reform are traced back since the mid-1980s.

7.3.2 Decolonisation and the Implications on Liberal Studies

Hong Kong was reunited with the Mainland in 1997. This historical moment had an impact prior to 1997, including on ASL LS. The genesis of this curriculum was largely rooted in civic education, with the mission to enhance students' understanding of Hong Kong and China.

Wayne, also a subject committee member for ASL LS, confirmed that five modules "Hong Kong Studies", "Human Relationships", "the Modern World", "Science, Technology and Society" and "China Today" borrowed from the framework the *Guidelines on Civic Education in School* (CDC, Education Department, 1985). Wayne explained the Environmental Studies module, thus:

"Most Advanced Level subjects were offered as ASL subjects, half subjects of Advanced Level. Considering the subject nature of Geography, the subject committee of Geography did not recommend Geography as an ASL subject. It was put as a module in ASL LS - Environmental Studies." (Wayne)

The *Guidelines on Civic Education in School* have been modified from time to time and these guidelines have acted as a blueprint for Liberal Studies. Morris et al. (2000)

and Morris and Morris (2000) delimited the boundary of Civic Education. The various scales on which civic education considered community matched closely with the modules in ASL LS.

“The curriculum [Civic Education in 1996] is organised around six areas, namely family, neighbouring community, regional community, national community, international community, and citizenship and civil society”

(Morris et al., 2000:256)

“The 1998 Syllabus also follows the 1996 Guidelines by providing conceptual and curriculum frameworks from ‘a learner’s perspective’ – with the student as ‘the centre of all learning activities’ (CDC, Education Department, 1996:9). Civic learning is then placed in the contexts of family; neighbouring community; regional community; national community; international community; and citizenship and civil society”

(Morris and Morris, 2000:41).

The contexts (family, neighbouring community, regional community, national community, international community, and citizenship and civil society) match with respective modules (Human Relationship; Hong Kong Studies; China Today; Modern World, Science, Technology and Society).

In addition to Wayne’s oral testimony, the subject committee list of ASL LS (1 September 1997 to 30 August 1999) provides supportive evidence of the profound role Civic Education played during the formation of ASL LS (See Appendix 7.1). The Senior Curriculum Officer and Curriculum Officer of Civic Education took over the positions of vice chairperson and secretary of the ASL LS subject committee respectively (CDC, 2000a:4). The Civic Education section of the CDC took up a key role in drafting ASL LS curriculum.

NSS LS has inherited a significant amount of curriculum content from ASL LS.

During the preparation phase of NSS LS, the Secretary for Education and Manpower, Professor Arthur Li, stressed that the government could implement the NSS LS by using the experience of ASL LS (Minutes of Special Meeting of Panel on Education, 29 October 2004):

“... The good practices, experiences, and reflection developed from teaching ASL, Integrated Humanities, and Science and Technology under the existing structure would be used to support other schools that had little experience in the teaching of the subject.” (p3)

Former Secretary for Education and Manpower, Professor Li’s speech in the Legco implied that the curriculum content of NSS LS would come close to that of ASL LS.

A substantial literature has argued that Liberal Studies serves the purpose of civic or citizenship education. Civic education needed attention from the 1980s, due to the politicisation of the curriculum in the light of the return of Hong Kong’s sovereignty to the PRC (Leung and Yuen, 2009; Kuah-Pearce and Fong, 2010; Morris and Chan, 1997a). The release of respective *Civic Education Guidelines* in 1985 and 1996 (CDC, 1985 and 1996) stimulated discussion of the pathway and study of Civic Education in Hong Kong. According to Lau and Kuan (1991), “many Hong Kong Chinese have been awakened from their political hibernation to become more aware of changes in their political environment” (p.1)

Morris and Chan (1997a) argued that the Sino-British Joint Declaration accounted for the emergence of ASL LS and that ASL LS helped students to broaden their horizons on the issues of Hong Kong and China.

“The curriculum they produced reflected ways in which the criteria for

defining valid and acceptable knowledge changed and the extent to which the changing socio-political context [the signing of the Sino-British Joint Declaration] allowed different individuals to interpret what changes were needed in terms of their own ideological orientations. The introduction of the Liberal Studies curriculum made explicit an intention to overcome the constraints that typified many academic advanced level subjects, which focused on abstract decontextualised knowledge and to liberate the minds of students by requiring them to study a wide range of real issues that had an impact on their daily lives. In effect, Liberal Studies attempted to provide a more contextualized and politicized curriculum.” (p.257)

Tan (1997a) shared a similar viewpoint:

“The changes have included the addition of new subjects, the revision of existing subjects and an emphasis on civic education. For example, government and public affairs and Liberal Studies were added as new examination subjects in the late 1980s and early 1990s, respectively...The syllabus revision has been aimed at preparing students for their role as future citizens of both Hong Kong and the PRC.” (p.161)

Fok (1997) summarised Tan (1993) and Wan-Chan’s (1994) studies, agreeing that a greater proportion of curriculum time had been spent on understanding China since the 1984 agreement on Hong Kong’s return to the ‘motherland’.

“To achieve the target of Hong Kong people ruling Hong Kong, as promised in the Joint Declaration, schools have to help students to develop a new sense of identity as citizens in the Special Administrative Region under Chinese sovereignty. This sense of identification cannot be forced upon an individual. It can only develop naturally with understanding, acceptance, and appreciation. The first step would be to help pupils to know more about China: this could be done through the formal curriculum. Indeed, the process of modifying the school syllabus is already underway. Morris (1990) undertook a thorough study on the changes to the relationship to China. Tan (1993) has carried out a similar study of the History syllabus. Wan-Chan (1994) has examined Liberal Studies which was introduced in 1992 in the sixth form. They invariably show that a greater proportion has been devoted to China and that China is now being shown in a more positive light.”

(Fok, 1997:93)

Hong Kong’s last Governor, Christopher Patten, introduced more elected seats in Legco and Morris and Chan (1997b) argued that ASL LS served to enhance the

citizenship of Hong Kong students in the context of this political reform package.

However, this opinion was reflected in the writings of only a few scholars.

“Since the early 1980s, official curriculum policies have been characterised by a greater awareness of the needs of individual children and of the need to broaden the curriculum through the promotion of aspects of personal, social, and moral education. These policies broadly paralleled the increasing liberalisation of political processes, such as the inclusion of elected members in the Legislative Council. Other attempts to broaden the nature of the curriculum involved the introduction of new school subjects of a more integrated nature such as Social Studies (1975), Integrated Science (1976) and Liberal Studies (1988).” (p.250).

Liberal Studies provided contextualised and politicised studies of China and Hong Kong. In Civic Education, substantial emphasis was put on developing students’ identification with Chinese culture and good citizenship. The government also added topics to the existing subjects, including History, Chinese History, Economic and Public Affairs and Social Studies. Much of this curriculum content would once have been regarded as contrary to paragraph 78 of the Education Regulations 1971. Violation of such regulations could have resulted in the closure of the school, dismissal of the teacher or withdrawal of government financial support (Morris and Sweeting, 1991).

Wayne reported during one interview that he heard that an expanded curriculum would be aimed at understanding China but he did not know whether ASL LS served the purpose of enhancing students’ understanding of Hong Kong and China. He again emphasised that ASL LS had originated from the *Civic Education Guidelines* of 1985.

As Morris and Morris (2000) argued, as an education reform ASL LS was more

symbolic than actual. The impact was felt by less than 10% of the senior secondary schools in Hong Kong.

“Two new subjects were introduced – government and public affairs (GPA) for secondary years four and five, and Liberal Studies for the sixth form. These reforms remained more symbolic than substantive, but they reflected awareness that the political transition required a fundamental re-evaluation of the role and nature of civic education.” (pp.39)

Despite the low student enrolment, it was a good start for senior secondary school students to learn about their living environment, think more and get in touch with political topics. ASL LS helped to prepare students to know more about Hong Kong and China.

The HKSAR government has repeatedly emphasised that Hong Kong people should develop a sense of national identity and love their country – China. The first Chief Executive of the HKSAR, Mr. Tung, Chee Hwa, explicitly requested that people in Hong Kong should develop their national identity and love their nation. This decision is enshrined in various educational documents such as *Aims of Education for the Twenty-first Century* (Education Commission, 2000).

In post-colonial Hong Kong, students’ willingness to “contribute to the future well-being of the nation” has become part and parcel of the overall aims of the education for the twenty-first century (ibid: 30). Kuah-Pearce and Fong (2010) commented that:

“National identity is no longer a taboo within the educational discourse in post-colonial Hong Kong. It has been highlighted in many of the curriculum guides of the Key Learning Areas as well as the revised or newly developed subjects such as ... and Liberal Studies for senior secondary students.”

(p.436)

Indeed, nurturing national identity has been an imperative element in the post-colonial period. National identity has been highlighted as one of the core values within moral and civic education (CDC, 2001b:20). It has become one of the seven learning goals (CDC, 2007) and accordingly, has been highlighted in many of the curriculum guides of the Key Learning Areas as well as in revised or newly developed subjects, such as General Studies for primary school students and Liberal Studies for senior secondary school students. It has been suggested that the HKSAR Government has politicised the school curriculum (Law, 2004) in comparison with the colonial era (Kuah-Pearce and Fong, 2010). Liberal Studies teachers are encouraged to draw authentic issues to design curricula. It allows the students to discuss and analyse controversial and political issues in lessons. This is the original motive of Tung's Education Reform.

Yuen and Byram (2007) also suggest that an NSS area of study, 'Society and Culture', is able to foster the sense of identity of Hong Kong.

"It is interesting to note that the students are required both to study Hong Kongers' sense of national identity, amidst local and global identity, as well as aspects of PRC's governance. It could therefore be that the issues raised here are likely to face a much larger number of teachers." (p.35)

Morris et al. (2000) observed examples of teaching strategies. Out of the three examples given, two related to China and Chinese traditions, giving pupils "a better understanding of various Chinese traditions and the values attached to them" and "a greater sense of understanding of the relationship between China and Hong Kong" (pp.62-63). Leung (2008) further noted that with the introduction of Liberal Studies as

a mandatory subject in 2009, Hong Kong civic education had been entering into a new phase which he named “2009 onwards: Civic Education through Liberal Studies”

The only new curriculum initiative that touched on Chinese government and politics was the subject Liberal Studies. CDC and HKEAA (2007) stressed in the Curriculum Guide the importance of Liberal Studies:

“The reconciliation of the potential conflicts of the diverse subject aims, namely the development of students’ ‘multiple perspectives’, ‘critical thinking skills’ and also their becoming ‘independent thinkers’ and ‘informed and responsible citizens of the society, the country and the world’.”
(CDC and HKEAA, 2007:5)

Kuah-Pearce and Fong agreed that these aims would be tried out in the classroom at Secondary 4. (Kuah-Pearce and Fong, 2010)

From a policy perspective, school civic education in Hong Kong has been usually divided into three or four stages by scholars. The characteristics of these different stages include depoliticisation, nationalism, redpoliticisation, and patriotism with Chinese culture overtones (Morris and Morris, 2000).

The development of civic education is at the crossroads after the Umbrella Movement. The major discussion point is the where and how Liberal Studies should fit regarding content and orientation. I will come back to this point after discussing the local level factors.

7.4 Local Level Factors

The local level factors (I refer mainly to universities, principals, teachers, and students) exhibit different influences on the history of Liberal Studies. In most other subjects, all stakeholders except students are crucial in facilitating or impeding the curriculum development. Nevertheless, it seems that Liberal Studies is different. Throughout the history of Liberal Studies, decisions made by HKU have been influential, while students, unexpectedly, have been perceived as one of the key factors in shaping NSS LS.

7.4.1 Opposition from the University of Hong Kong

HKU retarded the development of ASL LS curriculum at a critical point by refusing to accept ASL LS as an element fulfilling the entry requirements of the university. This caused a chain-reaction, as other universities in Hong Kong followed suit, refusing to accept the subject's legitimacy.

When the Joint Declaration was announced in September 1984 and subsequently signed in December 1984, Hong Kong started to experience its political transition toward 'one country, two systems'. The Hong Kong government found that Hong Kong's youth, as a group, was insufficiently educated to perform as informed voters in the rapidly changing political system. Citizenship education, preparing and teaching Hong Kong's next generation of voting citizens, was called for. *Guidelines on Civic Education in Schools* were issued by the CDC of the Education Department in August 1985. The need to develop political and civic awareness among pupils was spelled out (Morris and Morris 2000).

However, the *Guidelines* caused disappointment. The public expected that an independent and compulsory subject would be required to enhance, strengthen, and promote students' political education to cope with their future under a Chinese government. This education was expected to differ from the 1950s' implementation of Civics, which was an examination oriented subject at primary and secondary levels (Hung, 2014). Morris and Chan (1997a) regarded the original, compulsory conception ASL LS as serving the purpose of citizenship education.

Wayne argued that the Senate of HKU prevented ASL LS becoming compulsory:

“Given that there were potentially not enough students to admit the universities, the Senate of the University of Hong Kong decided not to accept ASL LS as an entry requirement of compulsory subject. As the University of Hong Kong had a leading position, other universities in Hong Kong followed the decision made by the University of Hong Kong.”
(Wayne)

With reference to entry requirement as stated in the University of Hong Kong Calendar 1994-1995, ASL LS was implicitly included in the admission criterion under (II)(C)(ii) “Grade E..., and in two AS subjects other than Use of English and Chinese Language and Culture’. ASL LS was therefore considered by the University of Hong Kong as an ordinary subject with similar status to other traditional subjects.

- “(a) To satisfy the minimum requirements for entrance to the University, each applicant shall:*
- (I) gain in his first and/or second attempt in the HKCEE*
 - (A) Grade C or above in English Language 1;*
 - (B) Grade D or above in Chinese Language 2; or Grade E in a language other than Chinese and English;*
 - (C) Grade E or above in Mathematics; and*
 - (D) Grade E or above in four other subjects 3; provided that achievements in any six of the subjects listed above are obtained at one and the same time; and*
 - (II) gain the following in HKALE:*

- (A) *Grade D or above in ASL Use of English;*
 (B) *Grade E or above in ASL Chinese Language and Culture 4, 5;*
 and
 (C) (i) *Grade E or above in two AL subjects;*
 (ii) *Grade E or above in one AL subject, and in two AS subjects other than Use of English and Chinese Language and Culture; or*
 (iii) *Grade E or above in four AS subjects other than Use of English and Chinese Language and Culture.”*
 (University of Hong Kong, 1994:1-2)

The decision of HKU undermined the importance of ASL LS. This subject was offered as an elective module. As mentioned, the teachers, on behalf of their students, would choose two out of six modules to teach and for public examination. The modular approach to ASL Liberal Studies undermined its original purpose of serving citizenship education and political awareness. This was also why another interviewee, Kevin, the vice principal of a secondary school in Hong Kong, did not consider offering the subject.

“As ASL LS was offered in modular approach, there were no big differences from the traditional disciplinary subjects. Our management considered it did not justify spending manpower if AS LS was organised in this compartmentalised manner.” (Kevin)

In my study, the Senate decision of HKU's seems to be the most decisive factor in shaping the curriculum history of ASL LS. It affected the mode of curriculum integration, reduced the number of students enrolling, and undermined the purpose of establishing a subject nurturing political awareness. As a result, Hong Kong society did not give much attention to ASL LS. My interview with Wayne supported this view: he regarded ASL LS was an attempt which had failed.

On the other hand, in the preparation and consultation phase of NSS LS, the Secretary

for Education and Manpower saw the support of the vice-chancellors as one of the most important reasons to implement NSS LS.

“Secretary for Education and Manpower added that the Heads of University Committee had expressed support for the “3, 3, 4” structure, and had announced its intention to incorporate the proposed new cores subjects, including Liberal Studies, as the general admission criteria for undergraduate programmes” (Minutes of Special Meeting of Panel on Education, 29 October 2004:3).

The HKSAR government learnt from experience and had sought and built a consensus among the vice-chancellors of universities in Hong Kong, especially HKU. In the university entrance requirements of the General Regulations in the Calendar of the University of Hong Kong, the requirements are stated as follows:

“To satisfy the minimum requirements for entrance to the University, each applicant shall gain in the Hong Kong Diploma of Secondary Education Examination:

- (i) Level 3 or above in English Language;*
- (ii) Level 3 or above in Chinese Language;*
- (iii) Level 2 or above in Mathematics;*
- (iv) Level 2 or above in Liberal Studies; and*
- (v) Level 3 or above in two elective subjects.”*

(University of Hong Kong, 2016:1-2)

NSS LS Studies is included in University entrance; this is in congruence with the policy of Education Bureau. As such, NSS LS could be well-developed compared with ASL LS. Thus, the universities’ attitude played a vital role in shaping the history of Liberal Studies.

7.4.2 Principals

In both Liberal Studies curricula, the majority of the principals were reactive in the curriculum decision-making process, playing a minor role in shaping the development of the Liberal Studies curriculum. They mainly influenced implementation at the school level.

When the Senate of HKU refused to accept ASL LS as meeting its entry requirements, many principals chose not to introduce ASL LS. Day (1991) pointed out that the principals' unwillingness to introduce of ASL LS stemmed from its not being required by the tertiary institutions. Kevin saw the failure to make ASL LS compulsory was a major reason for not putting forward this subject in his school. Other interviewees, such as Wayne (a government official), and the two university lecturers, Elaine and Karst, agreed that the opposition from HKU limited development.

Nevertheless, Dimmock and Walker (1997) found that some principals welcomed ASL LS. They speculated that those school heads might seize the chance to curry favour with government by offering ASL LS.

"The principals felt they could anticipate and predict the substance and continuation of the curriculum policy and this, in turn, provided them a sense of being able to cope with the associated changes ... Indeed, they saw the policies as offering them opportunities for making their own and their school transition to Chinese rule a good deal smoother." (p.288)

Some principals' comments reflected their willingness to implement and continue the policy thrust after 1997. One commented:

"The Civic Education Guidelines and other policies propose the teaching of nationalism, democracy, and history as useful for arousing feelings of

support and loyalty to the country [China]. You have to strengthen that element in Hong Kong because a century and a half of British rule has somewhat weakened the awareness of and identity with the mainland culture". (Dimmock and Walker, 1997:288)

The principals supported the implementation ASL LS mainly because they wanted their students to know more about Hong Kong and China, in line with the *Guidelines on Civic Education* of 1985. However, only a few principals supported ASL LS.

Principals were also passive in curriculum development for NSS LS, but this seems to have been because they were informed by the EMB during the consultation period between 2004 and 2005 that NSS LS would be a core subject. This meant that they did not have a choice. Principals had worried that Liberal Studies would become a receptacle for the “unwanted elements” (i.e. teachers) of other subjects (Adamson et al., 2010:116), until it became a core subject, along with Chinese, English, and Mathematics. Other subjects became elective subjects – “unwanted elements”- and teachers had to retrain to teach Liberal Studies.

In principle, the subject panel on the future of Liberal Studies showed consensus on the grounds that NSS LS would enhance the students’ knowledge and understanding of current affairs and cultural matters; however, some principals expressed the reservation that implementation of Liberal Studies would likely be a “tortuous process”. (Adamson et al., 2010:116)

The “tortuous process” was reflected in part in the professional development of potential Liberal Studies teachers. The professional development programmes

included training in the subject content, assessment, learning and teaching, and curriculum interpretation. Elaine and Karst mentioned their unpleasant experiences during the teachers' training courses.

"The teachers tended to complain about their schools in the training courses instead of learning."
(Elaine)

"Sometimes, the teachers may put the anger on me and I needed to pacify their discontent."
(Karst)

Some school principals required the potential NSS LS teachers to receive not only Education Bureau training but also to complete either in-service training in the form of a post-graduate certificate of education or a Master Programme in Liberal Studies. Nancy, the panel head of Liberal Studies of her school was appointed to the position after she acquired the qualification of Master degree in Liberal Studies. The part time study, in addition to extra full-time work commitments, imposed a heavy extra workload, as would be the case for many other teachers in the same position.

Despite this, the role of principals in NSS LS has mainly been managerial: they have no alternative. Some principals, mainly from Personal, Social, and Humanities Education, were devoted curriculum leaders, involved in curriculum planning, collaborative lesson preparation, and organising school-based professional development programmes. However, some principals were sceptical about the actual implementation and the development from 2004 to 2009. The manpower, examination format and mandatory requirements as university entrance requirement are their main concerns.

7.4.3 Teachers

The voice of teachers was not strong in ASL LS because only a few schools offered this subject. Some teachers were involved in teaching ASL LS, but they were unaccustomed to the novel teaching approaches of student-centred, multiple perspectives, and integrated curriculum (Day, 1991). The teachers were sceptical and lacked confidence in teaching a subject that was outside their ‘comfort zone’.

Teachers showed more concern when NSS LS was announced as a core subject because more teachers would be involved. In the period of preparation and consultation of NSS LS, teachers participated in training provided by EDB. The responses of teachers such as Karst and Elaine in last sub-section illustrates their negative feelings on this subject and also the sense of hopelessness common to too many education reforms.

Carless and Harfitt (2013) commented that the “lack of teacher ownership and participation in reform in Hong Kong has meant that innovative curricula have usually only been adopted superficially” (p.173). Lack of teacher ownership of and participation in reform seem to have been commonly felt among potential Liberal Studies teachers, reluctant to teach a subject they had not mastered. In general, the teachers did not play a significant role in the curriculum decision process.

The passive role of teachers in shaping NSS LS was illustrated by the trimming of the curriculum by the government after the ‘inhumane’ comment of the Permanent Secretary of EMB, Mrs. Fanny Law, when two teachers committed suicide due to

heavy workload of education reform (See Chapter 6). The government turned a deaf ear to the criticisms of the intolerable workload of teachers, which resulted from Tung's education reform. The concession by the government, fine-tuning the curriculum, was only a remedial measure to pacify the discontent of teachers. The role of teachers was essentially reactive throughout the development of Liberal Studies. They were responsible for the implementation, and for shouldering the pressure and anxiety, of the curriculum change.

7.4.4 Students

Hong Kong's students have seldom performed any role in curriculum development of subjects in school education in Hong Kong. This assertion is very true in ASL LS but there is a perception of a student-effect on the evolution of NSS LS during and after the Umbrella Movement, of September 2014.

ASL LS students treated Liberal Studies as a subject and showed little interest in influencing it. Day (1991) argued that ASL LS was also actively resisted by students, as they do not appear to have been provided with model answers. Students were reported as feeling that it was difficult to prepare for the examination without a textbook to guide their conventional rote learning. However, the culture of both teachers and learners changed, which is essential for the successful implementation of any education reform initiative.

Throughout the preparation and early implementation of NSS LS (2004-August 2014), the students were not in any position to influence the curriculum. No one expected

NSS LS to dominate headlines from September to December 2014. Some pro-establishment politicians accused the graduates of NSS LS students and existing DSE students of organising and participating in the Umbrella Movement. I believe that for the most part, the NSS LS students have had a limited actual effect on the Liberal Studies curriculum. But the perceived effect may be significant, as Liberal Studies has since become a scapegoat for the Umbrella Movement. The future curriculum development of Liberal Studies is not only an educational issue but also a political agenda.

Hong Kong's First Chief Executive, Mr. Tung, Chee Hwa, advocated comprehensive education reform (CDC, 2000b) with NSS LS as the integral compulsory subject (CDC and HKEAA, 2004 and 2005). There are several differences compared with ASL LS. Mr. Tung is a patriotic merchant of China. As the first Chief Executive, he felt that he had the responsibility to educate citizens, especially students, not only to understand Hong Kong and China but to love them. However, without doubt, some Hong Kong citizens have a phobia about Communist rule. Education reform, therefore, must tread carefully regarding citizenship or patriotism education. NSS LS has helped students to foster national identity (Kuah-Pearce and Fong, 2010) and a sense of Hong Kong identity (Yuen and Byram, 2007).

Through the theme of 'Society and Culture' and 'Modern China', the EDB hoped that the citizenship education of Hong Kong students might be enhanced. In addition, the CDC also emphasised critical thinking, social awareness, and multiple perspectives in thinking. This is a breakthrough in curriculum development in Hong Kong.

History tells us that communist leaders fear social movements, student movements, and large assemblies not of their own making. Following this train of historical thought, NSS LS students are suspected by some to be the ‘criminals’ of the Umbrella Movement. Nonetheless, as on most issues of Hong Kong society, opinions are divided. The theme, ‘Society and Culture’, especially in socio-political participation, was criticised by pro-establishment Legislative Councillors Dr. Leung Mei Fun and Mrs. Regina Ip.

“There’s always been a level of criticism from pro-Beijing politicians. But the political climate in Hong Kong has become a minefield, more so since the Umbrella Movement in December 2014. Priscilla Leung, a hitherto pro-Liberal Studies Hong Kong Lawmaker, argues in that while the subject [Liberal Studies] equips Hong Kong youth with an awareness of the issues, the youth lack the necessary maturity and awareness to participate meaningfully in politics. It has also been said that many Liberal Studies teachers have used the subject to advocate their own [often times anti-Beijing] political beliefs, which defeats the diversity-orientated and balanced approach the curriculum preaches. That may well be true since quite a number of Liberal Studies teachers were said to have participated in the Umbrella Movement.” (South China Morning Post, 13 February 2015)

Former Permanent Secretary of the Education and Manpower Bureau, Mrs. Fanny Law, commented that the subject involved too many political issues. These are typical of the general criticisms of NSS LS as causing the ‘Umbrella Movement’. These commentators take a pro-Beijing stand and seize the chance to align themselves with the Chinese government. The negative image of Liberal Studies is possibly the result.

Most of my informants agreed that Liberal Studies should be preserved. Wayne and Levin commented that students who studied Liberal Studies developed a greater sense of social awareness. Karst and Elaine noted that the students had fostered the habit of

newspaper reading since starting Liberal Studies. Nancy was concerned that there might be structural changes, with teachers moving from Liberal Studies back to other disciplines. Most interviewees did not believe that the Liberal Studies programme was the sole factor causing the Umbrella Movement.

Recently, there have been two larger-scale studies on the cause and effect relationship between the Umbrella Movement and Liberal Studies, and on the role Liberal Studies can play in the future of citizenship education.

A survey was conducted in 2015 by researchers at CUHK Institute of Asia-Pacific Studies, and consisted of in-depth interviews with 36 students of Liberal Studies from 15 schools and 20 core members of the now-defunct Scholarism. Most students said their sole motivation was to achieve high scores. To this end, they drilled through assignments and tests to master model answers, which usually meant stating multiple points of view and presenting both positive and negative aspects of an issue. The drive for exam-oriented seems to dampen, rather than encourage, activism. Those who joined Scholarism said they did so through communication with peers and information from news media, not because of liberal studies. Over half of them had never participated in any protest before joining Scholarism. Looking back, none attributed their decision to join the group to having taken lessons in Liberal Studies. In most cases, politicisation seemed to have intensified through their experiences in taking social and political action and through personal or online contact with activists. Only two respondents said Liberal Studies classes had a direct impact on their political engagement, crediting their teachers for inspiring them. Looking at the findings, however, the researchers believed

politically radical teachers to be in the minority. (10 August 2017 South China Morning Post)

Fung and Su (2016) examined how student participants in the Umbrella Movement reflected on their learning of Liberal Studies in relation to that movement. Rather than blaming the Liberal Studies curriculum, as some government officials and politicians have done, the respondents acknowledged that Liberal Studies not only provided content knowledge and multiple thinking perspectives indispensable for their understanding of many of the socio-political issues that Hong Kong and mainland China face, but said it also aroused their social awareness and interest in civic engagement and political participation. The respondents' recognition of the importance of Liberal Studies demonstrates that political controversy should not compromise educators' confidence in the curriculum's role in supporting student development and that engaging students in discussions of controversial issues is sometimes necessary to nurture critical minds. In sum, the case of Liberal Studies offers valuable lessons for Hong Kong and other countries and regions as they rethink the future of citizenship education.

To prove that Liberal Studies has caused the Umbrella Movement, a number of cause and effect relationships need to be established.

- (1) Has NSS LS induced an anti-government social awareness?
- (2) If so, how has NSS LS enabled students to convert anti-government thought into practice?
- (3) Are there any other factors contributing to the Umbrella Movement?

The claims of pro-establishment parties, who assert a simple casual relationship between Liberal Studies and the Umbrella Movement, seem based on more than gut feelings. However, this sort of emotional reaction is likely to increase pressure on the CDC's curriculum developers in the next academic review, due in 2020.

7.5 Chapter Summary

The interplay of international, regional and local level factors has been examined in order to understand the development of Liberal Studies curricula. The lens of world system theory, globalisation and STS movements has helped us to understand the pressures for training in generic skills, for multiple perspectives and for developing critical thinking in applied subjects.

Owing to the colonial background of Hong Kong, colonialism and decolonisation have played a part in shaping curriculum development. Liberal Studies was strengthened by the development of Civic Education as a subject in Hong Kong. This brought a close relationship between Liberal Studies and curriculum policy during the late colonial years. Academics, as mentioned before, have commented that the curriculum became politicised after the signing of the Sino-British Declaration. However, this does not provide a full explanation of developments in ASL LS.

Liberal Studies is a unique subject. Local level factors have been most important in shaping its development. HKU's refusal to accept ASL LS as a compulsory entry requirement of significantly retarded its development. The subject became an elective

and no different from traditional subjects. In contrast, the compulsory nature of NSS LS has been confirmed with the support of the universities in Hong Kong. The attitude of universities has been fundamental.

Students were a peculiar stakeholder in NSS LS. In Chapters 6 and 7, I analysed the Umbrella Movement and its potential impact on the future of Liberal Studies. The contrasting pictures of NSS LS during early implementation period and in the period of the Umbrella period were presented. Although the subject will remain in place until 2020, the perceived influence of Liberal Studies on the Umbrella Movement will be a powerful factor in its evolution. With influence from China and pro-establishment parties in Hong Kong likely to prove decisive, it is not easy to be optimistic about the future development of Liberal Studies.

Chapter Eight

Conclusion

8.1 Introduction

This study has explored the history of Liberal Studies in Hong Kong, and the factors shaping its development.

Three overlapping stages can be identified: ASL LS (1992 to 2012), NSS LS (2009 to August 2014), and NSS LS (September 2014 to December 2014). ASL LS (1992 to 2012) could not attain the status of being a core subject, mainly due to opposition from HKU to its being an entry requirement. Other universities followed suit. In contrast, from 2009 to August 2014, NSS LS experienced great support from the HKSAR government, as an essential component of the education reform. Nonetheless, the HKSAR government seemed to withdraw support for Liberal Studies in the wake of the Umbrella Movement which government and pro-establishment Legislative Councillors perceived as under the leadership of, and having active participation from, NSS LS students.

From the historical evidence, it was the interplay of international, regional, and local level factors that shaped the development of Liberal Studies. Although all played a part, local level factors (including the HKU's decision and the sharply contrasting attitudes of the HKSAR government before and after the Umbrella Movement) were fundamental in influencing the three overlapping histories of Liberal Studies.

8.2 Summary of Findings

ASL LS was formally proposed in the Llewellyn Report by the Visiting Panel in 1982. The emergence of ASL LS was mainly caused by the changing socio-political environment around 1984, marked by the signing of Sino-British Joint Declaration. In preparation for the reunion with China, Hong Kong students were expected to learn more about Hong Kong and China under a newly politicised curriculum (Morris and Chan, 1997a). ASL LS carried this historical mission of preparing the next generation of Hong Kong citizens by equipping them to better understand their own home and its relationship with China. In this sense, regional level factors (colonialism and decolonisation) played a vital role in the setting up of the curriculum. For instance, in “understanding Hong Kong and China”, the Education Department took the content of the curriculum from the *Guidelines of Civic Education* (CDC, Education Department, 1985 and 1986). In other words, ASL LS was constructed on the existing framework, rather than built from the ground up.

NSS LS originated in Chief Executive Mr. Tung, Chee Hwa’s education reform. This education reform attempted to prepare students to have ‘whole person development’, ‘critical thinking’, ‘multiple perspectives’, and ‘lifelong education’, and to face the challenges of globalisation (CDC, 2000b). NSS LS was intended develop generic skills and global citizenship with a wider scope than ASL LS’s understanding Hong Kong and China. NSS LS attempted to prepare citizens to face the challenges of the 21st century, an era characterised by the interconnectedness of the globe and the explosion in knowledge. International level factors, including globalisation, were therefore key in Tung’s education reform.

In the histories of both the ASL LS and the NSS LS, local level factors (stakeholders) played significant roles, defeating the original purposes of the curricula. Specially, local level factors overrode regional factors (colonialism and decolonialism) in relation to ASL LS, and international level (world system) factors about NSS LS.

For ASL LS, HKU's refusal to accept Liberal Studies as a compulsory subject caused a chain reaction of other universities and was ultimately a serious setback to the planned education reforms in the 1990s. At senior secondary school level, the number of candidates for ASL LS remained low. In curriculum organisation, a modular approach was employed instead of an integrated one. Each school chose just two modules out of six. If the schools avoided choosing "Hong Kong Today" and / or "Modern China", this would undermine of the original purposes of increasing understanding and knowledge of home (Hong Kong) and "mother country" (Mainland China).

The NSS LS experienced an erratic trajectory. From the consultation period in 2004 to August 2014, the HKSAR Government expressed profound support for making NSS LS a core subject. This policy had the full support of the First Chief Executive, Mr. Tung Chee Hwa and his education ministry Professor Li and senior education civil servant Mrs. Fanny Law (See Chapter six).

During the consultation period, the teachers' representatives and some Legco Councillors were strongly against compulsory Liberal Studies due to the pressure this would place on teachers. However, the government was determined to bring about a sea change in the Hong Kong's education system. Despite opposition from within the

education profession, NSS LS became available in 2009. At that time, it seemed that Liberal Studies had blossomed after 17 years of effort. The HKSAR government actively promoted Liberal Studies from 2004 to 2014. Interviewees from different sectors, Nancy, Elaine, Karst and Wayne, regarded NSS LS as successfully fostering the social awareness and critical thinking of students.

This changed with the ‘Umbrella Movement’ in 2014. It disrupted the smooth development of Liberal Studies. Students were criticised by some pro-Beijing and pro-establishment politicians for stirring up the Movement, and Liberal Studies was partially blamed. After the street protests ended, the HKSAR Government seemed to retract some of its support for Liberal Studies. Even Mrs. Fanny Law, the former Permanent Secretary for Education and Manpower, who had previously actively promoted the subject, withdrew her support.

In 2016, Liberal Studies is still offered as a core subject. Criticism over the role of students in the Umbrella Movement appears to have died down. Will Liberal Studies still be offered as a core subject after the medium-term review in 2020? I am pessimistic. It has become a highly politicised subject, and involves the discussion of many controversial social, political, and economic issues. Hong Kong has been become more politicised following the Umbrella Movement and society has been become more divided. The political situation has become more complicated. There has been a dramatic increase in polarisation between Hong Kong’s pro-establishment and pro-democracy camps. Radical democratic parties that have a strong belief in localism and Hong Kong independence are gaining support, and their supporters are usually

younger and feeling more disaffected than the democracy activists of the 1980s. My pessimistic sentiment is grounded on the recent less tolerant attitude to persons with opposite opinions and the more suppressive stance and actions taken against dissent.

In the Legco Elections of 2016, six radical democratic candidates successfully won seats. One of these, Mr. Law, Kwun Chung, Nathan was an active leader in the Umbrella Movement and the youngest Legislative Councillor in the history of Hong Kong (The Standard, 5 September 2016). It seemed that there was still hope for the democratic movement in Hong Kong. Nevertheless, HKSAR government launched a series of actions to suppress the radical democrats. The Government sought the interpretation of law of National People's Congress on oath by Legislative Councillors saying that all oaths taken by office-holders must be 'solemn, accurate, complete and sincere', with no deviation from the official wording. In the light of this interpretation of the law and with the addition of extra wording in the oaths, the High Court, on 14 July 2017 disqualified legislators Law, Kwun Chung and three other Legislative Councillors (BBC News 2 December 2016). This move by the government, by reducing the number of pro-democratic lawmakers, has deprived the pro-democracy camp in Legco of its veto power.

The government suppression of the pro-democratic parties was not at an end. The prosecutors, the Department of Justice, appealed the sentence given to three key student activists from the 2014 Occupy protests – Joshua Wong, Chi Fung Joshua, Law, Kwun Chung and Chow, Yong Kang Alex– for storming the government headquarters. Instead of social service order, they found themselves with jail terms (South China

Morning Post, 17 August 2017). Three student leaders pay the price of imprisonment for civil disobedience.

The Umbrella Movement, as a watershed in the socio-political landscape of Hong Kong, has led to reduction in HKSAR Government's tolerance. The Government employs the judicial system to eliminate persons with opposite opinions. Liberal Studies has been treated as a scapegoat for the Umbrella Movement by the pro-establishment Legislative Councillors with teachers blamed for spreading anti-China messages in lessons. One of the student leaders, Mr. Wong Chi Fung Joshua, was a student of Liberal Studies. In the present political environment, and given the firm belief that Liberal Studies has caused the radical social movement, the survival of Liberal Studies after 2020 is likely to be a political decision rather than a purely educational decision.

8.3 Significances of Findings

This section draws a holistic summary on the Liberal Studies history in the light of my secondary education, professional journey of education and my doctoral research.

When I received my secondary education in Secondary 6, ASL LS was offered. ASL LS was a vocabulary for me because the principal and the teachers in my school did not choose this subject for us. It reflected the scene, as described in Chapter 5, that this subject was not well-received at that time.

Liberal Studies and my life paralleled with each other until I was appointed to be the

potential head NSS LS in a secondary school in 2004 to 2005 and acted as a part-time lecturer of Liberal Studies in a university in Hong Kong. I have understood Liberal Studies by joining NSS consultations and professional development workshops organised by EDB. Although I do not need to teach NSS LS in field studies centre, the experience in learning NSS LS stimulates of intrinsic motivation in researching Liberal Studies.

Publications of the history of Liberal Studies in Hong Kong are not a popular research topic despite twenty years of controversy and debate. This study can be considered as a few and pioneering attempt to describe and account for the development of ASL LS and NSS LS.

This historical research has shown the main features of the development of Liberal Studies and the factors underpinning such development. These factors were categorised into three levels: international, regional, and local. Local level factors were concluded to be most pertinent in shaping both ASL LS and NSS LS, although the interaction between the levels was usually complex

In addition, this research has highlighted the meanings associated with the Liberal Studies. As Chapter two showed, in contrast to the beliefs of many teachers, Liberal Studies has a clear and relatively rigid subject boundary. It is also a subject with clear purposes. ASL LS served the purpose of understanding Hong Kong and mainland China. NSS LS inherited the curriculum framework, aiming to widen horizons to global development.

In the context of the sociology of education, this research also analyses the inter-relationship between Liberal Studies and the Umbrella Movement. Both sides of the argument have been examined. These include both the simple cause and effect relationship posited by pro-establishment Legislative Councillors and counter-arguments of informants in this research. The research therefore illuminates major political events through the lens of curriculum development. In future, political involvement in curriculum development seems inevitable in Hong Kong.

8.4 Limitations

The findings of this historical research were derived from documentary analysis and oral history. Although there is a fair amount of documentation available, the sensitivity of the subject in the wake of the 2014 Umbrella Movement affected the willingness of certain actors to be interviewed. Documentary analysis was therefore the main research tool on which this research rested, supplemented by the oral history which triangulates the analysis in relation to implementation.

Key persons on the subject committee, the CDC, and the HKEAA declined to be interviewed because the interview fell into post-Umbrella Movement period. The lack of enthusiasm, amounting to scepticism, and the consequent avoidance on the part of government officials of any discussion of Liberal Studies became an impediment to the oral history. Undoubtedly, this lack of participation (and therefore loss of potentially illuminating commentary) from government officials constrained my efforts to present a fully multiple-perspective account of the history. I am still glad to have interviewed two former government officials, who provided information from the

angle of government.

The majority of the seven interviewees who participated in the study chose to use pseudonyms for their own protection. This was very different from the experiences of Vickers (2000), Kan (2002), and Lau (2010). At that time, interviewees appear to have been more willing to speak on the record. Whether their fears are real or imagined, concerns about persecution or retribution may have influenced interviewees' decisions to participate in my research. The different attitudes of the current interviewees seem largely to reflect the changing socio-political environment and the influence of the mass media. Interviewees appeared afraid that their comments might be misinterpreted or deliberately distorted and manipulated.

The EDB has been less supportive of scholarly research in this area since the end of the first decade of this century. The studies conducted by Vickers (2000), Kan (2002), and Lau (2010) on respective curriculum development received the full support of the HKEAA and CDC. Both organisations were willing to share internal documents such as minutes and reports at that time.

8.5 Suggestions for Further Research

This thesis has explored and analysed the development of Liberal Studies in Hong Kong from 1992 to 2014. This research classifies three overlapping stages of Liberal Studies development over the study period. Three levels of factors were employed to explain the interplay of the history of Liberal Studies. However, historical evidence suggests that local level factors played the most significant role. Before finishing this

thesis, I propose two areas for further investigation, which mainly focus on the genesis and the part played by the Umbrella Movement.

Journals and publications have consistently claimed that ASL LS started after the signing of Sino-British Joint Declaration in 1984. The Legco database shows that discussions on Liberal Studies can be traced back to contributions by Rev. Joyce Margaret Bennett (Hansard, 5 July 1978:1146) and Mr. Wu, S.C., Alex (Hansard, 6 July 1978:1171), indicating that the idea of Liberal Studies was advocated well before the Joint Declaration. This raises a number of questions. Why did the two Legislative Councillors propose Liberal Studies in late 1970s? Why was their idea not put into practice at the time? Why were such historical records not mentioned? These questions are worthy of consideration in future research.

The Umbrella Movement is widely believed by many teachers to have affected the future development of Liberal Studies. This research has used oral history to analyse a range of viewpoints. However, it cannot fully explore the relationship between Liberal Studies and the Umbrella Movement, and the role of students, due to its ad hoc research design, data collection and data analysis. The Umbrella Movement took place in 2014 while the research planning happened from 2011 to 2013. I found myself facing the dilemma of whether to end the study in August 2014 or to extend it to December 2014. I chose the latter because tracing the history of Liberal Studies without including the Umbrella Movement seemed inadequate.

8.6 Epilogue

The findings of this research show that the evolution of the Liberal Studies curriculum reflects socio-political changes in Hong Kong society. This is compatible the general views among curriculum historians (Frankin, 1999). This is consistent with the findings regarding the role of the Sino-British Joint Declaration and the refusal of HKU to admit ASL LS as a compulsory entry requirement in the ASL LS, and also in the impacts of pressure on teachers accumulated from various education reforms and Umbrella Movement on the history of NSS LS.

It was while I was collecting and analysing data that the Umbrella Movement took place. I decided it was important to cover this social movement in the research. In the debate of the Umbrella Movement in this thesis, I could not avoid presenting and analysing sensitive arguments. In 2015 when I wrote the thesis, the “Causeway Bay Bookstore Disappearance” took place and shocked the publishing industry and Hong Kong society. The incident was reported in BBC news:

“The tiny shop [Causeway Bay Bookstore] specialises in selling gossip paperback books that are highly critical of China's leadership. They are particularly popular with mainland Chinese visitors who cannot buy the banned books at home.

But two weeks ago, four men who work for the bookstore and its affiliated publishing house went missing. Their colleagues believe they have been detained by Chinese officials because of their work [however, there were no emigration record of these four men in Hong Kong Immigration Department].

One of their associates, Mr Lee, told BBC News: "I suspect all of them were detained. Four people went missing at the same time." (10 November 2015)

The principle of ‘One Country Two Systems’ applied to Hong Kong is clearly stated in

the Blueprint of Basic Law.

“The socialist system and policies shall not be practised in the HKSAR, and the previous capitalist system and way of life shall remain unchanged for 50 years. (Blueprint, Article 5).”

Freedom of press and freedom of speech should be protected according to Article 27 of Basic Law, stemmed from the principle of ‘One Country Two Systems’:

“Hong Kong residents shall have freedom of speech, of the press and of publication; freedom of association, of assembly, of procession and of demonstration; and the right and freedom to form and join trade unions, and to strike.”

However, it seems that the Chinese government has tightened its control of Hong Kong, possibly after the Umbrella Movement, leading to the decline of the Hong Kong people’s confidence of the promise of ‘One Country, Two Systems’ (HKU Public Opinion Programme, 2017²²).

In the situation, the space for writing a thesis on sensitive issues has seemed move limited. Nevertheless, I still believe choosing this research topic was right and appropriate. Its message is not that Liberal Studies is right or wrong, nor to evaluate whether Hong Kong has become a subversive base in relation to mainland China, but to construct a framework for debating sensibly the arguments about how far the Umbrella Movement was influenced by NSS LS. Moreover, I believe my methodological approaches in data collection, analysis and presentation are logical and scientific. My conclusions are therefore well-grounded and supported by evidence from informants and from documents.

²² <https://www.hkupop.hku.hk/chinese/popexpress/trust/conoacts/poll/datatables.html> (accessed on 19 June 2017)

An anonymous scholar (see Section 3.4) suggested that the explanation of curriculum change in Liberal Studies could be seen in a more pragmatic or evolutionary light. ASL LS aimed at widening the narrow horizon of the Advanced Level system. Built on ASL LS, NSS LS became a core subject in order to foster generic skills, blur the boundary between Science and Arts subjects and nurture the students' multiple perspectives.

Given the pace of social change, curriculum change is inevitable; from time to time, our society needs a major education reform. Perhaps, this pragmatic perspective accounts for the historical change from ASL LS and NSS LS. However, socio-political factors have also played a part in shaping the Liberal Studies curriculum. Pragmatic and socio-political perspectives are not mutually exclusive in explaining the evolution of Liberal Studies.

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Appendices

Appendix 2.1: Curriculum Description of Liberal Education of the Seven UGC Universities (Classified by Leung and Choi, 2006)

Cluster 1: Universities stress training in technology and commerce

Universities	Name of General Education	Content of the General Education
Hong Kong Polytechnic University	General Education	Includes a series of courses comprising English, Chinese, leadership and interpersonal development; to complete at least one subject of four domains (i.e. Human Nature, Relationships and Development, Community, Organisation and Globalisation, History, Culture and World Views, Science, Technology and Environment) under Cluster Area Requirement Subjects respectively, China Studies Subjects and Broadening Subjects.
City University	Gateway Education	Course requirement of 30 credits from the Gateway courses. Courses include English, Chinese Civilisation, Arts and Humanities, Study of Societies, Social and Business Organisation, and Science and Technology.
University of Science and Technology	Common Core Programme	Course requirement of 36 credits from Humanities, Social Analysis, Science and Technology, Quantitative Reasoning, Arts, English, Chinese and Healthy Lifestyle courses.

(Source: Websites from Hong Kong Polytechnic University, City University and University of Science and Technology – accessed on 30 June 2017)

Cluster 2: Liberal Arts Education:

Universities	Name of General Education	Content of the General Education
Lingnan University	Liberal Arts Education	Course requirement of 33 credits from the Common Core Curriculum (out of 120 credits) including Common Core (Thinking Skills, Making of Hong Kong, Morality, History and Civilization) and Five Clusters encompassing Creativity and Innovation, Humanities and the Arts, Management and Society, Science, Technology and Society, Values, Cultures, and Societies. At least 50% of the students major in a liberal discipline in accordance with the Carnegie classification as well as residential exposure for most students in campus.

(Source: Lingnan University Website – accessed on 30 June 2016)

Cluster 3: Integrated Universities with Comprehensive Faculty of Arts, Social Sciences, Science, Medicine, and Education:

Universities	Name of General Education	Content of General Education
Hong Kong University Hong Kong Baptist University The Chinese University of Hong Kong	Common Core Curriculum General Education General Education	There are 170 courses covering four groups, including (1) Scientific and Technological Literacy, (2) Humanities, (3) Global Issues, and (4) China: Culture and State. The courses are divided into core requirement and distribution requirement. In the core requirement, students have to take courses on Chinese and English language, Numeracy, Meaning of Life, Physical Education, and History and Civilization. In the distribution requirement, they have to take one course from each of Arts, Business, Communication / Visual Arts, Science/Chinese Medicine, Social Science and Interdisciplinary subject respectively. Students can choose from over 200 courses offered by various teaching departments which are grouped into four required study areas: (1) Chinese Cultural Heritage, (2) Nature, Science and Technology, (3) Society and Culture, and (4) Self and Humanity. Moreover, students are required to attend one college general education course.

(Source: Websites from Hong Kong University, Hong Kong Baptist University, and the Chinese University of Hong Kong – accessed on 30 June 2016)

Appendix 4.1 Extract of Background Data from Documents

VI.9 The I Level Curriculum

VI.9.1 We recognise the need to spell out clearly the rationale for the proposed new I levels. First, we believe that their introduction should make it possible to broaden the course of studies undertaken by students in the sixth form. Second, we see I levels as a means of establishing a valid certificated course of studies for students leaving the sixth form after one year. Further, although in the academic subjects derived from A Levels it will be necessary for the I levels to demand comparable intellectual ability, we recommend that some schools should introduce two-year Form 6 streams in which I level examinations can be taken after two years. Students in such streams should be allowed to proceed to take A levels in a third year (i.e. for them, Form 7) at the discretion of the principal and subject to places being available. We believe that this would provide a worthwhile sixth form course for students not ready to take A levels in two years. In Annex VIB we have set out possible combinations of courses of studies to illustrate the working of this system.

VI.9.2 The I levels derived from A level subjects should be developed as subsets of those subjects. That is, while assuming comparable intellectual ability the subsets would be developed to cover approximately half the teaching syllabus of the comparable A level. How the individual subsets were derived from A levels would depend on the nature of each subject, but we believe that this should be possible.

VI.9.3 The I level examinations should be scheduled as late in the school year as possible. We propose the end of May to the beginning of June, in order to maximise the amount of teaching time.

Data Related to Liberal Studies Extracted from:

Education Commission. (1986). *Education Commission Report No.2*, Hong Kong: Government Printer, pp.83-84.

Appendix 4.2 Research Ethics Approval Form

School of Education – Research Ethics Approval Form



The University of
Nottingham

2014/8/JG

Name Wing Ming Clement Cheng
Main Supervisor John Holford
Course of Study EdD
Title of Research Project: Curriculum history of Liberal Studies in Hong Kong (1990s – 2010s)

Is this a resubmission? No Date statement of research ethics received by PGR Office: 25/03/14

Research Ethics Coordinator Comments:

I have seen all the documents accompanying this submission and I am satisfied they meet the requirements for ethics approval.

I consider this research to be above minimum risk ☐

*Final responsibility for ethical conduct of your research rests with you and your supervisor. The Codes of Practice setting out these responsibilities have been published by the British Educational Research Association (BERA) and the University Research Ethics Committee.
<http://www.educationstudentintranet/researchethics/index.aspx> <http://www.bera.ac.uk/publications/Ethical%20Guidelines> If you have any concerns during the conduct of your research then you should consult those Codes of Practice and refer again to the School of Education's Research Ethics Committee.*

Independently of the Ethics Committee procedures, supervisors also have responsibilities for the risk assessment of projects as detailed in the safety pages of the University web site. Ethics Committee approval does not alter, replace, or remove those responsibilities, nor does it certify that they have been met.

Outcome:

Approved ☒

Revise and Resubmit ☐

Signed:

Name: Dr J. Gimenez
(Research Ethics Coordinator)

Date: 07.05.2014

Appendix 4.3

Consent Form for Interviews

The University of Nottingham

School of Education

Consent Form for Interview (Oral History)

Research Title: Curriculum History of Liberal Studies in Hong Kong
(1992-2014)

Researcher's Name: Mr. Cheng Wing Ming, Clement

Supervisor's Name: Professor John Holford

- I have received the researcher's letter of invitation for interview and read the Participant Information Sheet and the nature and purpose of the research project has been explained to me. I understand and agree to take part.
- I understand the purpose of the research project and my involvement in it.
- I understand that I may withdraw from the research project at any stage and that this will not affect my status now or in the future.
- I understand that I may contact the researcher or supervisor if I require further information about the research, and that I may contact the Research Ethics Coordinator of the School of Education, University of Nottingham, if I wish to make a complaint relating to my involvement in the research.
- The researcher will send me a copy of the transcript for approval and amendment if necessary.
- I understand that data will be stored a locked cabinet that is not accessible by others.

Please indicate your preference for the following statements by putting a tick in the relevant box:

- (1) ☐ I agree that what I say in the interview will be attributed to me by name in the thesis and in any publications arising therefrom OR
- ☐ I agree that my name should be listed in the thesis as having contributed to the research, but specific statements will not be attributed to me OR
- ☐ I agree to participate in the research but do not wish to be named (i.e., my comments will be anonymous).
- (2) ☐ I agree that the interview is to be audio/ video recorded for the purpose of the research.

Contact details

Researcher: email address: clement_cheng@hotmail.com

Supervisor: john.holford@nottingham.ac.uk

School of Education Research Ethics Coordinator:

educationresearchethics@nottingham.ac.uk

Contact no.: _____

Email a/c: _____

Name: _____

Signature: _____

Appendix 4.4 Semi-structured Interview Questions

Personal Background on Liberal Studies

1. What do you consider your role in ASL LS and NSS LS respectively?
2. In your experience, do you think professional development is essential to your Liberal Studies career? Why or why not?

History of ASL LS

1. There were number of incidents that shaped ASL LS:
 - Sino British Joint Declaration
 - Visiting Panel ReportWhich one was a more important factor? Why?
2. Do you regard ASL LS a successful experience of curriculum implementation? What is/are the factor(s) governing your thought?
3. 'One of the major curriculum objectives proclaimed by the government is to understand more about Hong Kong and China.' To what extent did ASL LS achieve this purpose?

History of NSS LS

1. What are the differences of the curriculum objectives between the ASL LS and NSS LS?
2. In what ways NSS LS inherit the salient features of ASL LS?
3. In contrast with ASL LS, NSS LS has been successfully turned into one of the core subjects. What are the crucial factors accounting for that?
4. From the consultation in 2004 to the full implementation of NSS LS in 2012, how do you comment on the pace?

History of NSS LS (After Umbrella Movement)

After Occupy Central and the Umbrella Movement in September to December 2014, it seemed that there has been a change of government attitude on NSS LS. How do you comment on the following viewpoints?

1. Change NSS LS back to elective module
2. Reduce the lesson time of Hong Kong while increasing the part of China
3. NSS LS should shoulder part of the responsibility of the Umbrella Movement as it raised the social awareness of the youth

Appendix 6.1: List of Legislative Councillors expressed their opinions on NSS (2008-2012)

(A) Pan-democratic Parties

Legislative Councillors	Political affiliation	Constituency
Cheung Man Kwong	Democratic Party Hong Kong Professional Teachers' Union	Education
Lee Cheuk Yan	Hong Kong Confederation of Trade Unions	New Territories West
Tong Ka Wah, Ronny	Originally member of Civic Party He quitted Civic Party and Legislative Councillor on 2015 and set up Path of Democracy.	New Territories East
Wong Yuk Man	League of Social Democrats	Kowloon West

(B) Pro-establishment Parties

Legislative Councillors	Political affiliation	Constituency
Chan Yuen Han	Hong Kong Federation of Trade Union	District Council - Second
Ip Lau Shuk Yee, Regina	New People's Party	Hong Kong Island
Leung Mei Fun, Priscilla	Business and Professionals Alliance for Hong Kong Kowloon West New Dynamic	Kowloon West
Tse Wai Chun	Nil	Kowloon East

https://www.legco.gov.hk/general/english/members/memberslist/precedence/fourthlegislativecouncil_2008_2012.pdf - accessed on 21 November 2017

Appendix 6.2: Proposed Core Subject Framework for the New Senior Secondary Curriculum: Liberal Studies 1st Draft (For Consultation) – 2004

Area of Study	Compulsory Part	Elective Part (Select any TWO units from this part of each Area of Study)	Independent Enquiry Study
Self & Personal Development	SP1: Understanding Oneself SP2: Interpersonal Relationship	SP3: Adversities in Life SP4: Sports & Health SP5: Art & Life SP6: Leisure & Life	An enquiry into an issue of the student's own choice, using the concepts, knowledge and perspectives acquired during the course of the study.
Society & Culture	SC1: Life in Hong Kong under 'One Country Two Systems' SC2: Development of Modern China SC3: Globalisation in a Diversified World SC4: Chinese Cultural Heritage in the Modern World	SC5: Religion & Society SC6: Media & Society SC7: Chinese Way of Life in Global Society SC8: Peace & War in the Modern World	
Science, Technology & the Environment	ST1: Diseases & Public Health ST2: Information Technology & Society ST3: Pollution & the Environment	ST4: Biotechnology & Ethics ST5: Space Exploration & Society ST6: Transport & Technology ST7: Energy & Resources	

(CDC and HKEAA, 2004:6)

Appendix 7.1 Membership of the CDC Liberal Studies Subject Committee (Sixth Form)

The membership from 1 September 1997 to 30 August 1999 was as follows:

Chairperson: Mr. Wong Chi-kin (until 31 August 1998)

Mr. Lau Chong-yuen (from 1 September 1998)

Vice-Chairperson: Senior Curriculum Officer (Civic Education)

Curriculum Development Institute, Education Department

(Ms Cheung Po-che)

Ex-officio Member: Senior Inspector (Geography)

Advisory Inspectorate, Education Department

(Mr. Cheng Sai-man, until 31 August 1998)

(Mr. Lam Kwok-keung, from 1 September 1998)

Members: Ms Chan Ka-ki (until 31 August 1998)

Dr. Day, Jeffrey Richard

Mr. Lau Chong-yuen (until 31 August 1998)

Mrs. Lau Kun Lai-kuen, Stella

Mr. Li Chung-ming

Ms. Ma Kwai-heung

Ms. Ma Wai-sim, Lina (until 31 August 1998)

Ms. Wong Pui-shan, Maria

Mr. Wong Shiu-sang, Patrick

Secretary: Curriculum Officer (Civic Education)

Curriculum Development Institute, Education Department

(Mr. Fong Yiu-chak)

Source: Curriculum Development Council (2000). *Syllabuses for Secondary Schools Liberal Studies (Advanced Supplementary Level)*, Hong Kong: Government Printer. (p.3)

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