**Economic Globalization and Education Reforms in Hong Kong:**
*Corporate Managerialism and Quality Education at Work*

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**Introduction**

Educational changes are taking place around the world in response to the trend of globalization and the need to raise one’s competitiveness in the global world. Globalization seems to be an irresistible tide sweeping across the world that is difficult to resist. Hong Kong is of no exception. How can one prevent oneself from being swept away by the tide? How can one survive amidst such a tide? Restructuring the education system in the direction of nurturing a citizen with a global/cosmopolitan outlook and equipping him the necessary skills and techniques for survival in the global world seems to be a way to meet the challenge.

This paper attempts to explore the relations between globalization and education — how the former affects the latter, by reviewing the education reforms in Hong Kong since the 1990s. The first part of the paper will discuss various theories about globalization. Then a review of the education reforms that have been and are going to be carried out in Hong Kong since the 1990s will be given. The second part of the paper will concentrate on discussing the two elements of the global market economy, corporate management and accountability that are gaining momentum in the Hong Kong education system. An examination of the extent of corporatization of the education system, with special reference to the changes at the secondary school level in terms of school management, will be given. It will then be followed by a discussion of the development of quality education as a method to ensure accountability.

**Globalization: An Overview**

What is ‘globalization’? There have been quite different views of this term. For some, the term refers to the emergence of supranational institutions such as the IMF, the World Bank and the transnational corporations whose decisions shape and constrain the policy options for any particular nation-states. (Burbules & Torres, p.1)

David Held suggests that globalization is the product of the emergence of a global economy, expansion of transnational linkages between economic unites creating new
forms of collective decision making, development of intergovernmental and quasi-supranational institutions, intensification of transnational communications, and the creation of new regional and military orders. The process of globalization is seen as blurring national boundaries in such a way that local happenings are shaped by events occurring many miles and vice versa. (Burbules & Torres, p.29)

The process of globalization are complex, and Appadurai describes them in five dimensions: (i) ethnoscapes (tourists, immigrants, refugees); (ii) mediacscapes (lines between the “real” and the fictional landscapes are blurred through the media); (iii) technoscapes (configurations of technology); (iv) finace-scapes (financial flows have decoupled themselves from other landscapes); and (v) ideoscapes (ideas of freedom, welfare, rights and so on are spreading in the world). (Daun, p.3)

Capital accumulation in the global economy has become more knowledge-based and knowledge-intensive. Those countries, firms, individuals, etc. that have access to the most sophisticated knowledge and information are able to compete. The intensified, global competition based on rapid technical and organization change has resulted and continue to result in dramatic changes in industrial structure as well as in management structures. The production factors or human capital no longer determine comparative advantages and competitiveness but rather the interrelationships between (i) the organization and management of work and production; (ii) development of human knowledge and skills; (iii) the conditions for the ability to apply technological innovations; and (iv) flexible production. The organization is now changing or has to change from Fordism to Post-Fordism, the latter being characterized by just-in-time delivery and functionally flexible workers. (Daun, p.8-9)

The new global economy is more fluid and flexible and it requires workers with the capacity to learn quickly and to work in reliable and creative ways. Economic restructuring calls for corresponding changes in the education policy to nurture a new generation of students/workers that are able meet these challenges.

What are the implications of economic globalization and post-Fordism for education? There are pressures to develop educational policies that attempt to restructure postsecondary educational systems along entrepreneurial lines in order to provide flexible educational responses to the new model of industrial production; and a related call for the reorganization of primary and secondary education and teacher education along lines that correspond to the skills and competencies (hence educational qualifications) required by workers in a globalizing world. (Burbules & Torres, p.35)
Highly globalized economies require that students in school learn certain basics (de-contextualized knowledge) but they also have to become creative, innovative, and flexible to find solutions to new problems. (Daun, p.20) At the school level, post-Fordist philosophy plays out in different ways. First, the structure of the educational system and the way of organizing schools is expected to become more similar to the way private companies are organized and managed, from Fordist to Post-Fordist. Secondly, the introduction of IT “filters” other activities in the school. That is, interaction and learning are more and more by IT equipment. (Daun, p.22) In a knowledge-based society, the knowledge cycle is short and information spreads fast. It is through education that talents are nurtured for the general development of the society in the highly competitive, globalized world.

**Education Reform in Hong Kong in the 21st century**

‘The World has Changed, So Must the Education System!’ This is the statement starting the chapter on ‘Background to the Education Reform’ in ‘Learning for Life, Learning through Life: Reform Proposals for the Education System in Hong Kong’ published in September 2000. (This Reform Proposals was endorsed by Mr. Tung Chee-Hwa, the former Chief Executive of the HKSAR, in October 2000.) The world is undergoing fundamental economic, technological, social and cultural changes. The industrial economy is gradually replaced by the knowledge-based economy. Industries that rely on cheap labour are giving way to emerging industries founded on knowledge, technology and innovation. Rigid organizations, multi-layered management and strict division of labour are being displaced by lean management structures, streamlined networks and flexible staffing. The creation, updating and application of knowledge have become the key to the success of industries, organization and individuals. Moreover, rapid developments in information technology (IT) have removed the boundaries and territorial constraints for trade, finance, transport and communication. As communication links become globalized, competition is also globalized. Education reform is therefore a mean, as justified by the EMB, to enable Hong Kong to face the challenges posed by an increasingly globalized economy mentioned above.

The Education Reform carried out since 2000 aims at nurturing students with the following qualities: (1) good ability in languages and mathematics; (2) a broadened knowledge base; (3) independent learning and interpersonal skills; (4) good exposure in moral, civic, physical and aesthetic areas, and work-related experiences; and (5) lifelong learning skills.
There are broadly speaking seven major initiatives in the Education Reform — curriculum reform, language education, support for school, professional development, student admission systems, assessment mechanisms and increase in post-secondary education opportunities. What have been carried out? Concerning the curriculum reform, the Curriculum Development Council (CDC) has set out seven learning goals, four key tasks to promote learning to learn and nine generic skills in teaching and learning of existing subjects/ Key Learning Areas (KLAs). The introduction of Capacity Enhancement Grant and Quality Education Fund are support offered to schools by the government. The practice of continuing professional development of teachers is being institutionalized. The Primary One Admission System and Secondary School Places Allocation System are under review and the ‘through-train’ mode is promoted. Territory-wide System Assessment, one of the components of the Basic Competency Assessments (BCA), has been and will be carried out at Primary 3, Primary 6 and Secondary 3. In his fourth Policy Address in 2000, Mr. Tung Chee Hwa laid down the objective in tertiary education was to have 60% of the senior secondary school-leavers receiving tertiary education by 2010/11 school year. The figure for the 2004/05 school year is 53%. Moreover, in order to ensure the transparency and accountability of schools, the quality assurance mechanism has been put into effect.

‘The New Academic Structure for Senior Secondary Education and Higher Education: Action Plan for Investing in the Future of Hong Kong’ has just finished and is now under preparation, which is scheduled to be implemented in 2009. Under the new “3+3+4” academic structure, all students will enjoy six years of secondary education (including 3 years of junior secondary education, 3 years senior secondary education and 4 years university education). All students will have a Senior Secondary Student learning Profile including results in the Hong Kong Diploma of Secondary Education (HKDSE) examination (the one that replaces the existing Hong Kong Certificate of Education Examination and the Hong Kong Advanced Level of Education Examination) and other achievements during the senior secondary school years. Concerning the curriculum, students will take four core subjects (Chinese Language, English Language, Mathematics and Liberal studies). Students may choose two to three electives from 20 New Senior Secondary (NSS) subjects and/or a wide range of courses from Career-oriented Studies (COS). Students will also enjoy other learning experiences, including moral and civic education, community services, aesthetic and physical activities and work-related experiences such as job attachment.
Changing in the academic structure can be said as a response to the global educational pattern as six years secondary education and four years tertiary education is a pattern adopted widely over the world. Learning is more profound if we experience, apply or do. The globalization of knowledge places a much higher premium on integration of theoretical and applied learning. This understanding is at the heart of our thinking about When preparing the new senior secondary curriculum, the policy equally critical is that emerging young adults have some exposure to the world of work while still at school. After all, schooling is not an island; senior secondary must in part prepare students for adult life, including possible careers.

The inclusion of COS and Liberal Studies in the new curriculum can be regarded as ways to create the kind of workforce that the new global economy requires. It is because of a greater emphasis on applied learning and opportunities for students to explore a career orientation that policy-makers have made COS an integral part of planning for the new senior secondary student programme. It is also said that Liberal Studies can help students develop multi-perspectives and critical thinking skills and a broadened knowledge base to complement the 8 Key Learning Areas (KLAs) and other learning experiences in the NSS education. The new curriculum is, in short, oriented towards the formation of the new kind of workers who should be more adaptable, creative, flexible and skillful that is needed by the global economy.

Meanwhile, the ‘Review of Medium of Instruction for Secondary Schools and Secondary School Places Allocation’ is under consultation. The medium of instruction remains an issue of hot debate because as suggested by the working group, mother-tongue teaching will continue to be upheld and all secondary schools in principle should adopt mother-tongue teaching at junior secondary levels. It is foreseeable that the number of schools using English as medium of instruction will be reduced. It is interesting to note that the chairman of the working group, Michael Tien, is from the business sector where lots of complaints of the low standards of English of the students at all levels are from. It is clear that the ‘consumer-driven’ (since the business sector is the largest consumer of the products of the education system) mentality plays a dominant role in the education reforms in Hong Kong.

The HKSAR government has taken a proactive approach in reviewing its education system and has started reforms to nurture more creative and innovative citizens for the increasingly globalized economy. Being a form of social strategic investment to nurture the next generation leaders in the 21st century, the government will continue to take an active role in the future development of education. (Mok & Chan, p.272-73)
will continue to adopt a ‘market-oriented approach’ and ‘corporate/new managerialism’ in education, decentralizing power but re-regulating educational practices and keep a close eye on the quality of education.

**Corporate/New Managerialism in Action**

One of the major tenets of new managerialism is that there is nothing distinctive about education; it can be conceptualized and managed like any other service or institution. Part of the success of the globalized new managerialism lies precisely in its claims for these generic aspects: its applicability to all spheres of administration and its homogenization of all technical or institutional problems as management problems. (Burbules & Torres, p.111-2)

In this section, I am going to examine the ways the notion of corporate/new managerialism is applied to the secondary schools in Hong Kong in the name of School-based Management (SBM).

Back in 1991, the Education Department (now known as the Education and manpower Bureau) introduced the School Management Initiative (SMI) Scheme, which offered a school-based management (SBM) framework for the improvement of the quality of primary and secondary schools. In Report No.7 in 1997, the Education Commission recommended that all public schools (government or aided schools) should practice SBM by 2000. SBM is a management framework which is school-based, student-centred and quality-focused. SBM aims to delegate more responsibilities to schools and provide them with enhanced flexibility and autonomy in managing their own operation and resources and planning for school development according to the needs of their students, with increased accountability in the use of public funds at the same time. Through SBM, schools will develop a management system to ensure the quality of learning and teaching. Since 2000/2001, the government has introduced a “Block Grant” funding arrangement for government and aided schools so as to facilitate their implementation of SBM and formulation of long-term development. By consolidating various non-salary recurrent grants, the “Block Grant” enables schools to deploy their resources more flexibly to implement long-term strategic planning. Besides, the government also provides schools with a “Capacity Enhancement Grant” for contracting out services or employing additional staff on top of the approved establishment. Other streamlining arrangements include revising the tendering and purchasing procedures, devolving to schools the autonomy in the use of non-government funds for teaching or schools purposes as well as for staff professional
development. It is hoped that the implementation of SBM will enable Hong Kong’s education system to cope with global developments, contribute to the personal growth of students, build a competent workforce to sustain the social, economic and cultural development of Hong Kong and further enhance its competitiveness internationally. (http://www.emb.gov.hk/index.aspx?langno=1&nodeid=1940)

Are those features sound familiar? It seems that schools are going to be run like a business corporation. Yet teachers are not trained for and intended to be administrators or clerical workers. As a result of the introduction of SBM, schools need to prepare a three-year development plan and an annual school plan; while every department also needs to prepare an annual program plan with a budget included. Evaluation should be conducted and follow-up actions carried out afterwards. The purchasing procedures become very complicated that quotations have to be made beforehand. Indeed, not only students are expected to receive whole-person development in their schooling but also the teachers in their job. Taking my experience as example, besides teaching, I am also a member of the Music Department. I know nothing about music and not able to play even a single kind of instruments. My job is to be responsible for the purchase, maintenance and repair of musical instruments and to arrange for the borrowing of musical instruments for students. I have spent lot of time to familiarize myself with all the musical instruments. I need to call at least three shops for quotation, even though I know that some musical instruments can only be purchased through a particular shop. During the period of Music Festival and if there is any public performance, members of the Music Department need to do the logistic work. We have once been joking that we can operate a small music company. This fits exactly to the call for lifelong learning in the global economic market. Moreover, the practice of contracting out service in the running of the ‘Capacity Enhancement Grant’ resembles the mode of production of the post-Fordist global economy.

The HKSAR government has introduced management reforms and adopted a ‘market-oriented approach’ in running education. The adoption of ‘managerialism’ may facilitate the efficiency and effectiveness of educational service delivery in Hong Kong. By adopting a managerial approach in education, education is being viewed as a commodity, the schools and universities as ‘value-adding’ production units, the school principals and university presidents as the chief executive officers (CEOs) and managing directors, the parents and employees as consumers and customers. (Mok & Chan, p.250)
The Pursuit for Quality Education

In Hong Kong, the government has introduced to the educational sector management strategies and ‘quasi-market’ mechanisms to promote quality to make the education system more accountable to the public since the government is still the major provider of education through public funds.

The Quality Assurance system in the school context is installed to ensure that public funds are used in a cost-effective manner. Quality assurance is supposed to be achieved through both internal and external quality assurance mechanisms within the school system. The internal quality assurance mechanisms include the auditing and monitoring of the performance of teachers, the use of both process and output indicators to measure ‘value-addedness’ in the schools; while the external quality assurance mechanisms include the Quality Assurance Inspection (QAI)/External School Review (ESR) from the EMB, and the linkage between funding mechanism and school performance in terms of efficiency, effectiveness and accountability. How is the Quality Assurance Process actually worked out at the school level? Schools are inspected on all the eight key learning areas (KLA) as well as all aspects of the schools’ work, i.e. Management and Organization, Learning and Teaching, Support for Pupils and School Ethos and Attainment and Achievement. Each school should work out its development plan based on the school aims and implements the plan. A self-evaluation should be conducted and an annual report towards the end of the year should be produced for parents' information. EMB will also conduct the ESR (formerly called QAI) to provide an external review on the performance of the school as a whole and inspection findings will be made open. The judgements are formulated on the performance of schools in a corporate manner. Yet, the ESR lasts for three days only at a time. Before coming, the external reviewers need to struggle through piles of reports and documents (as evidence) on the four aspects of the school’s work (domains) mentioned above complied by the school concerned according to the performance indicators (4 domains, 14 areas, 29 performance indicators with 80 components). The school I am teaching is going to have ESR in the coming September and we are now working hard to gather evidence for the 80 components of the 29 performance indicators. It’s really a hard time and we discover that we are like secretaries or clerks working in a commercial company instead of a school. During the three-day visit, the external reviewers need to observe lessons and each reviewer has to shadow one student for a whole day. They also need to interview teachers and even janitors. How accurate and objectives are the judgements made? How well do they know about the school from the documents and the three-day visit? Is it possible to determine whether
the school can provide quality education when all these are done?

Obviously, from how the quality assurance system is worked out in the school setting, it is clear that it is a management-based approach to the improvement of quality in school education, making the school more accountable to the customers in the manners of the business world.

In addition, attempts have been made to raise the quality of teachers who are regarded as an important key to quality education. Benchmarking for English and Putunghua teachers, through either taking the examination or attaining courses offered by the designated institutes, has been carried out for several years. That’s not the end of the story. After attaining the required standards, those English teachers are now needed to take the subject-knowledge courses. The Chinese Language teachers without a degree majoring in Chinese are not spared. The story is still not a complete one if the chapter on ‘Continuous Professional Development (CPD)’ is omitted. Teachers are expected to be able to pursue for a 150-hour CPD within three years’ time. The 150 hours of CPD should include time spent on structured learning and other professional development activities that contribute to school development. In other words, teachers are expected to attend courses/seminars, engage in professional exchange/enrichment activities within and among schools, as well as provide service and support to the education community which are regarded as an essential part of their professional lives. Teachers’ quality can be raised at the expense of the students who are relatively speaking given lesser time and attention by teachers.

Besides the Quality Assurance Inspection (QAI) / External School Review (ESR) and benchmarking for teachers, some schools in Hong Kong even borrow the ISO 9000 standards of the business and industrial sectors as a standard in measuring quality in education (management). The ISO 9000 standards are a set of international quality management standards and guidelines initially published in 1987. Standards are necessary in business in a free market system. ISO 9000 is a specification for a quality management system. It provides a framework for the development of a quality management system through developing documentation, built-in auditing and review activities, and also through developing an appropriate recording system for monitoring compliance to procedures. One major benefit of ISO 9000 is its value in international marketing in a globalized market. Even in the United Kingdom, the marketing function of seeking certification for a school is also practised. (Mok & Chan, p.93)
The ISO 9002:1994 (the one for corporate management) certificate is obtained in 1998 by a secondary school in Yuen Long District in the New Territories. This school is the first school in Hong Kong that obtained such a certificate. It is also one of the schools that has got high ‘value-addedness’. According to the school concerned, it is hoped that by introducing managerial practice in the local educational setting through getting the ISO 9002 certificate, school effectiveness can be enhanced and quality education be delivered. How effectively is the school managed as a result? After interpreting the 20 clauses of the 1994 edition of ISO 9000 standards, the school has taken 15 corrective and preventive measures; established about 50 types of quality records about students, teachers, curriculum, pastoral care and activities; and developed 41 work procedures in relation to the monitoring of the attainment level of new students, curriculum development, instructional design and improvement, assessment of students’ performance, graduation, counseling for further studies and career development, pastoral care and relationship management with alumni. (Mok & Chan, p.100-101)

The school seems to be well-managed with lots of mechanisms and procedures worked out. Yet, do all these guarantee quality in learning? There is no absolute relationship between a well-managed school (quality in management) and quality education. Even the so-called ‘value-addedness’ measures the output instead of the process of learning. Do the students really enjoying their learning experience? Or are they just being trained more effectively to observe rules and regulations? How about the teachers? All the mechanisms and procedures seem to make sense to the administrators such as the members of the School Council, the principal and the school management team but not the teachers. How much time do the teachers need to prepare the documents and reports for the school authorities? How much time is left for teaching? A twelve-hour working day is nothing special for many teachers in Hong Kong nowadays. If the ISO 9000 standards become popular in ensuring quality and accountability in the educational sector, I can’t imagine what kind of so-called quality education students are going to receive from the exhausted teachers.

**Conclusion**

The recent education reforms in Hong Kong have undoubtedly shown that it has been influenced by the global tidal wave of marketization to enhance the efficiency, effectiveness and economy of education. The initiation of a ‘Quality Assurance Movement’ and the obvious shift to a far more ‘management-oriented’ approach in Hong Kong has clearly demonstrated how popular the idea of corporate management in shaping and managing the educational sector in Hong Kong. (Mok & Chan, p.114-5)
The root of quality assurance is accountability, especially when education is still largely supported by public funds. Yet, there has been a confusion about accountability in Hong Kong. According to M.Kogan, accountability in the realm of education often refers to three dimensions: managerial accountability, client accountability, and professional accountability. In Hong Kong, however, it is often biased towards an obsession with managerial accountability. We can see a proliferation of indicators that only made sense to administrators. Many of the indicators have little to do with the responsibilities and tasks of the teachers; yet it is they that have to spend time and effort in order to satisfy the administrators. (Mok & Chan, p.60-61)

The global trends of decentralization and marketization continue to shape the educational development in Hong Kong. However, costs have to be paid. The educational ideal will be lost. Professionals will be estranged and alienated. Subjects with lower market value will be marginalized.
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