

Chapter 2

Review of Liberal Studies, National Education and Educational Policy Framework

Abstract Despite the scarcity of existing literature highlighted in the previous chapter, there are a few earlier academic publications that discuss the reintroduction of Liberal Studies and initiation of MNE within the NSS academic structure. Through perusal of the Western empirical literature corresponding to educational policy analysis, this chapter attempts to conduct an exploratory study by employing a thematic review strategy (Robson in *Real world research—resource for social scientists and practitioner-researchers*. Blackwell Publishers, Oxford, 2002). The reason for paying attention to such empirical studies is twofold. On the one hand, new issues are likely to be revealed from critiques of Hong Kong’s past policies related to Liberal Studies and MNE; on the other, different analytical frameworks can be critically explored with the aid of educational policy analyses from the West. This chapter is composed of three parts. The first part examines two different analytical frameworks that dissect the development of educational policy. The second part explains the scope and selection criteria of the literature affiliated with and applicable to this study in the Hong Kong context. Finally, based on a variety of assembled documents, the third part offers an in-depth review of Liberal Studies and MNE policy initiatives and failures.

2.1 Review of the Development of Educational Policy

2.1.1 *Definition of Educational Policy*

The definition of educational policy in the West has undergone a remarkable transformation in recent decades. The definition reflects the changes of emphasis in policy research in different periods of time (Levin 1998). In the mid-twentieth century, educational policy was well recognised as ‘statements’ and ‘ordinances’ that mono-directionally designated the order of decisions. Examples can be found in the 1960s, when educational policy was ‘a bureaucratic instrument’ to administer the public education sector (Taylor 1997, p. 3), and in the 1970s, when it became

the ‘determinant authority and great power’ to maintain the system of post-war education (Kogan 1975, p. 238). Thus, due to this ‘dominant’ status, the concept of educational policy was relatively ‘static’ rather than ‘dynamic’ in those periods.

The idea of ‘dynamic’ educational policy is constructed by the subsequent developments in its meaning in narrowing the traditional gap between policy ‘formulation’ and ‘implementation’ (Barrett and Fudge 1981). It is argued that this evolution was due to the recognition of the dynamic interplay of policymaking and practice. Policymaking is no longer a process that is terminated after the distribution of policy texts and documents; instead, it is an ongoing process interacting with its corresponding implementation. Owing to this new perception, teachers who have been customarily excluded from the process of policymaking are given the status of policymakers (Clandinin and Connelly 1996).

2.1.2 Two Major Conceptual Frameworks

These historical developments eventually established two main camps concerned with conceptual frameworks for analysing educational policy and practice (Vidovich 2001). The first camp developed a ‘state-centred’ perspective on policy analysis, particularly with relation to education policy in the middle of the last century, whereas the second promoted the dynamic interaction between policy-making and practice with the formation of a ‘policy cycle’ perspective. The two perspectives gradually developed into alternative frameworks that form the basis of different approaches to educational policy analysis (Raab 1994). These two frameworks have informed the majority of policy studies (Ranson 1995), and their evolution is presented in the series of discussions in the following sections.

2.1.3 The ‘State-Centred’ Framework

Vidovich (2001) summarised the evolution of the ‘state-centred’ framework and asserted that it was closely related to the role of the state in education from 1970s to 1980s. He concluded that the effects of the state in educational policy were greatly influential in Western countries in 1970s and developed as the dominant power in policy constitution. At the same time, however, public administration typically lacked theoretical analysis that could explain the government’s decision-making process. Hence, the state-centred theory was gradually conceptualised as a perspective to investigate contemporary educational policies. This perspective, based on concepts of interest exchange and power, conceived the relations between different levels of the state as forming a complex network of organisations. It successfully accounted for the policymaking that took place in the post-war education era, when governments monopolised educational resources. Moreover, up to 1980s, the increasing centralisation of power was observed in Britain (Ranson 1995).

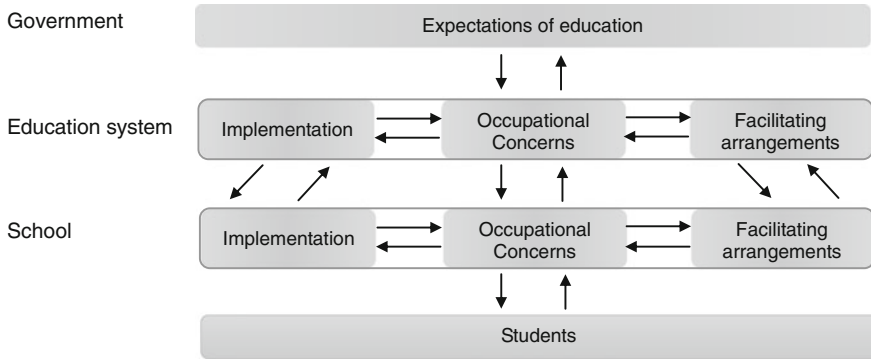


Fig. 2.1 The state-centred framework for analysis of education policy (Dale 1989, p. 61) (figure was edited by authors)

Overall ministerial control of educational policy provided a promising prospect for the adoption of a state-centred perspective to analyse the impact of the role of the state in education.

Dale (1983), an advocate of the state-centred perspective, considered the absence of a ‘systematic understanding of educational policy’ (p. 201) and proposed that a framework of the state should be constructed to acquire a better understanding of how particular educational policies were made. Thus, he created a state-centred conceptual framework (see Fig. 2.1 on the next page) to identify the symbiosis between government and the public sector in education (Dale 1989). The appearance of this framework was met with stinging criticisms from a number of researchers in short order. Dunleavy and O’Leary (1989) argued that the ‘concept of the state’ makes sense only when counterposed with ‘the concept of a non-state’ (p. 320) because its singular focus upon the government is arguably incapable of addressing issues concerning other educational sectors. Furthermore, Bowe et al. (1992) criticised the framework for detaching policy generation from implementation and its failure to characterise the micro-level of the policymaking process. Nevertheless, the framework gained praise from Apple (1989) and Ozga (1990), who expressed the view that it made a marked contribution to allowing investigations of the political and ideological dimensions of educational policy.

Lingard (1993) employed the state-centred framework to highlight Australian reflections on the state of policy sociology. He found that despite the reconfiguration of the state, it remained important in affecting contemporary educational policies. As a result, he called for the utilisation of this ‘sophisticated’ framework, while noting the drawbacks of its overemphasis on government power. Power (1995), in contrast, attempted to apply the state-centred framework to explain the changes in British schools, but discovered it to provide little help in illustrating what was going on within schools. Thus, he suggested a reconsideration of the framework’s usefulness for research dealing with micro-level policy analysis, such as small-scale case studies.

2.1.4 *The Policy Cycle Framework*

To analyse the origins, construction and implementation of the 1988 Education Reform Act in Britain, Ball (1990) sought to deploy the ‘policy cycle’ perspective as his research strategy. He described his approach as ‘an exercise in policy sociology’ that emphasised ‘the complexity of recent education policy-making’ (Ball 1990, p. 7). On comparing with the aforescribed state-centred perspective, his strategy shifted the research attention from state-level analysis to the individual practitioner. Indeed, Ball’s (1990) strategy emerged from the work of Foucault (1972). He identified certain key concepts of the philosopher that were applicable to education. For instance, he adopted the Foucauldian concept of ‘discourse’, which embodies the meanings of thought and speech to illustrate the essence of policy. Therefore, Ball (1993) stated that educational policy is a kind of discourse that incorporates humanistic meaning. In the early 1990s, Ball’s policy cycle strategy became increasingly popular as practitioners such as teachers began to gain more influence over educational policy (Ranson 1995), which eventually motivated him to conceptualise the strategy as a framework for analysis (Ball 1993).

In 1992, Ball’s work with Bowe and Gold developed into a thesis on policy formulation and implementation. That thesis originated the concept of a policy cycle and corresponding framework comprising three contexts, namely, ‘Influence’, ‘Policy Text Production’ and ‘Practice’. According to the thesis, educational policy can be divided into and interpreted within the discourses surrounding these three contexts, with the underlying assumption that no practitioners are excluded from either the process of policy generation or policy implementation. The ‘Influence’ context represents the conventional phase, in which education policy is initiated, when interested parties are devoted to exercising their influence over the purpose and design of a proposed policy. During the negotiation phase, the policy is then challenged and defended primarily through the mass media before gaining public acceptance. The second context is that of ‘Policy Text Production’. Typically delivered in a manner that claims to support the common good, a policy text generated by the government *is* the policy, and its appeal is based on claimed consensus and political reasoning. Once enacted, however, a policy does not remain static in the context of ‘Practice’, as practitioners bring their own methods of working and personal interpretation to policy implementation. Hence, the three phases are in fact interdependent and form a continuous cycle, as depicted in Fig. 2.2.

Ball’s (1992) policy cycle framework has been attacked primarily by Dale (1991) and Hatcher and Troyna (1994). Dale argued that the framework ignored the strong relationship between politics and policymaking. Moreover, he contended that Ball’s idea of ‘policy discourse’ inappropriately interpreted the key concepts proposed by Foucault. Hatcher and Troyna, on the other hand, disagreed with Ball’s idea about the decentralisation of power in policymaking. They argued that the role of the state in controlling policy outcomes was still significant. Nevertheless, Ball’s framework has been widely employed by a number of researchers, including Lingard (1993) and White and Crump (1993).

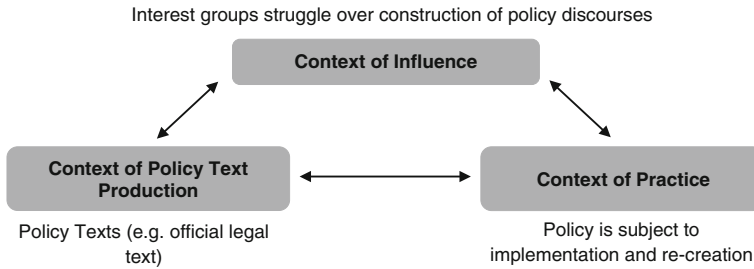


Fig. 2.2 Policy cycle framework for policy analysis (Ball 1992, p. 52) (figure was edited by authors)

Ball and Bowe (1992) applied the policy cycle framework to investigate the implementation of a national curriculum policy in Britain, illustrating that the state's control of education still dominated curriculum policy in that country. In addition, they also claimed that the government deliberately ignored teachers in the process of policymaking. McHoul (1994) later adopted the framework to analyse Australia's Queensland Equal Opportunities Policy in the education arena. He asserted that it was an ideal instrument to analyse the contradictions between policy texts and implementation.

2.2 Criteria for Inclusion

The motivation for setting the criteria for inclusion in this research emerged from reflections on the large corpus of literature showing the development of various academic subjects in Hong Kong, including Chinese Language, English Language and Mathematics. However, very little attention has been paid to Liberal Studies (Morris and Scott 2003), let alone the short-lived MNE. Similarly, a wide range of educational policy research places emphasis on schools' effectiveness, leadership and management; by contrast, very few investigations fall into the category of curriculum policy studies (Morrison 2003). Thus, there is little local scholarship that combines and discusses Liberal Studies or MNE in conjunction with their respective curriculum policies. The same can be said of many Western countries, with curriculum-specific policy studies accounting for a very small portion of studies in the education arena compared with general policy research (Kirst and Walker 1971).

By employing the criteria for inclusion described below, our study eliminated irrelevant research publications. What remains are 44 eligible articles that form the basis of our thematic research. Twenty-seven of these articles relate to Liberal Studies, and seventeen to MNE (see Tables 2.1 and 2.2 on pages 29–30). The criteria and their use are listed below in descending order of importance.

Table 2.1 Summary of the review of the first introduction of liberal studies

Study	Policy initiatives	Policy failures
Morris and Sweeting (1991)	The signing of the Sino-British Joint Declaration in 1984	
Morris (1992)	The preparation for the transfer of Hong Kong to Chinese sovereignty	
Fok (1997)	Consistent pursuit of democracy by Hong Kong people in 1980s	The lack of initiative and ability of teachers in the implementation of policies
Morris and Chan (1997)	The shift of curriculum criteria and the need for academic competence	
Tan (1997)		No single reason for the failure of the introduction
Bray (1997)	A large number of mainland Chinese teenage immigrants lacked understanding of Hong Kong culture	
Morris and Chan (1998)		Hong Kong government's incompetence in cultivating commitments in schools
Morris et al. (2000)		Hong Kong government's incompetence in cultivating curricular commitments in schools
Morris et al. (2001)		The substantial gap between the intended and implemented curriculum
Lee (2002)	Increase of elected seats in the legislative council and the rise of aspirations for a democratic society in Hong Kong	

- (i) Coverage—(a) For the review of Liberal Studies and MNE in Hong Kong, for inclusion all articles must inquire into the policies of the subjects' introduction or initiation. Literature covering a broader range of issues but still offering a specific discussion of the policies is acceptable. (b) For the review of educational policy analysis in Western countries, all articles should discuss the analytical frameworks adopted in most policy research. Critiques of such frameworks are strongly preferred.
- (ii) Kinds of Publications—International journals have the highest priority because of their greater impact in academia (Garfield 1998). Local journals that have gone through the peer-review process are also eligible. However, monographs and unpublished essays such as research students' thesis are excluded from our review.

Table 2.2 Summary of the review of major conceptual frameworks in policy analysis

Framework	'State-centred'		'Policy cycle'	
	Study	Finding(s)	Study	Finding(s)
Evolution	Vidovich (2001)	The role of the 'state' in educational policy was greatly influential to Western countries in 1970s	Ball (1990)	Ball deployed the 'policy cycle' perspective to investigate the 1988 Education Reform Act in Britain
	Ranson (1995)	Phenomenon of the further increasing centralisation of power in Britain was observed	Ranson (1995)	The 'policy cycle' strategy became more popular
Formulation	Dale (1983)	Dale proposed a framework of the 'state' to acquire a better understanding of educational policies	Ball (1992)	Ball, Bowe and Gold developed the fundamental concept of a 'policy cycle' framework
Critiques	Dunleavy and O'Leary (1989)	Concept of the 'state' as not capable to address issues concerning other educational sectors	Dale (1992)	The framework teased out the strong relationship between politics and policymaking
	Bowe et al. (1992)	The framework detached policy generation from implementation	Hatcher and Troyna (1994)	They disagreed with the idea of the decentralisation of power in the framework
	Apple (1989) and Ozga (1990)	The framework was a remarkable contribution to educational policy studies	Lingard (1993) and White and Crump (1993)	The framework was widely accepted by other researchers
Application and results	Lingard (1993)	The framework was applicable to demonstrate the Australian policy sociology	Ball and Bowe (1992)	The framework was applicable to investigate the implementation of national curriculum policy in Britain
	Power (1995)	The framework provided little help to explain the changes in schools in Britain	McHoul (1994)	The framework is an ideal instrument to analyse the contradictions between policy texts and implementation regarding the Queensland equal opportunities policy in education

Nineteen articles that fulfilled the above criteria were published in such international journals as the *‘Cambridge Journal of Education’*, *‘Oxford Review of Education’* and *‘International Journal of Educational Research’*. The remainder of those included had gone through rigorous peer-review procedures before being published in respectable journals. Therefore, the findings elicited from the included literature should have a high degree of validity. The following sections describe the initiatives and failures of the first introduction of Liberal Studies and MNE in Hong Kong schools.

2.3 Review of the First Introduction of Liberal Studies and Implementation of MNE

2.3.1 Policy Initiatives of Liberal Studies

Our broad thematic review of the first introduction of Liberal Studies suggests that policy initiatives were mainly driven by the occurrence of sociopolitical activities in Hong Kong. This understanding is supported by the vast majority of articles demonstrating that the political events that occurred between the 1980s and 2000s played an important role in the government’s policymaking and practical considerations with regard to Liberal Studies, as the following paragraphs illustrate.

Morris and Sweeting (1991) were amongst the first batch of researchers to observe a strong relationship between education and politics in Hong Kong. They conducted a study with the explicit title ‘Education and politics: The case of Hong Kong from an historical perspective’ that investigated the influence of legitimate political power on the school curriculum. They found that a sense of ‘politico-phobia’ pervaded Hong Kong’s education system from 1945 to 1982. However, the study also indicated that after the signing of the Sino-British Joint Declaration in 1984, the British colonial government began its attempt to equip schools with a Chinese cultural identity by launching a new secondary school curriculum. The authors suggest that this political context propelled the idea to introduce Liberal Studies into secondary schools.

A later study carried out by Morris (1992) confirmed the previous findings. It asserted that the preparation for the transfer of Hong Kong to Chinese sovereignty created a new political climate that affected the school curriculum in ‘two distinctive ways’ (p. 158). First, colonial government policy started to promote the study of China and encouraged students to take pride in their Chinese cultural heritage. Morris illustrated this idea by giving an example in the contemporary Liberal Studies curriculum, which required secondary school students to study the biographies of the former chairman of the Communist Party of China, Mao Zedong. Secondly, the regulations restricting the flow of political materials about the government were radically amended in 1988. This amendment permitted teachers to

incorporate sensitive political issues into the Liberal Studies curriculum after they had been explicitly forbidden to do so following the so-called ‘Star Ferry Riots’ in 1966.¹

Two more articles published in the subsequent decade jointly sustained the same argument (Fok 1997; Lee 2002). They provide further details about the political initiatives in the first introduction of Liberal Studies. Fok (1997) scrutinised the political culture in Hong Kong, and claimed that the consistent pursuit of democracy by Hong Kong people in the early 1980s started exerting pressure on the colonial government to promote citizenship education by launching Liberal Studies. The sense of Hong Kong Chinese citizenship was greatly motivated by the one million Hong Kong people’s demonstration against the PRC government’s suppression of the pro-democracy movement in Tiananmen Square. He insisted that, as a consequence of this political event, the government stood no chance of ignoring the Hong Kong people’s demand for citizenship education. Lee (2002) further elaborated this view by considering the increase in elected seats in the Legislative Council. He stated that such an increase not only triggered unprecedented political campaigns, but also aroused people’s political interest in the late 1980s. Due to the rise in aspirations for a democratic society, Hong Kong people urged the government to allow schools to teach controversial government-related issues. As a result, Liberal Studies was introduced at the AS-level of the old senior secondary education system in 1992, alongside other social studies subjects such as Government and Public Affairs (GPA), which had been taught since 1988 to promote concepts pertinent to Western democracy and political processes in China (Torney-Purta et al. 1999). With the arrival of Governor Christopher Patten in 1992, who adopted a pro-democratic policy in governing Hong Kong, the Liberal Studies curriculum was preserved.

Arising out of our thematic review, two pieces of work related to Chinese History also indicate the political initiatives for curriculum development in Hong Kong (Luk 1991; Lee 2007). In addition, there were no articles that rejected the claim of a powerful connection between political events and policy initiatives in Liberal Studies. Thus, it appears that the introduction of Liberal Studies was primarily generated by political events in Hong Kong. However, two articles further explored the causes of the subject’s introduction with regard to social issues. In considering the socioeconomic environment in Hong Kong, Morris and Chan (1997) argued that the growth of the middle class during the 1980s had shifted the curriculum emphasis from memorisation to critical thinking, which accords with Liberal Studies’ stated aim of upgrading students’ analytical abilities. Bray (1997)

¹In April 1966, several protests broke out after the British colonial government imposed a fare increase on the Star Ferry, the major harbour crossing between Hong Kong Island and the Kowloon peninsula at the time. The government’s suppression of the riots caused public outrage and resulted in one death and the conviction and imprisonment of 258. The Kowloon Disturbances Commission of Inquiry set up to investigate the underlying causes of the outbreak reported the lack of a sense of belonging and trust in the government amongst the working class. School content continued to be depoliticised to discourage people from participating in sociopolitical events.

analysed the contemporary social structure of Hong Kong, arguing that the goal of the ‘Hong Kong Studies’ module in the Liberal Studies curriculum was aimed at addressing the lack of understanding of Hong Kong culture amongst the sizable population of teenage immigrants from mainland China studying in Hong Kong secondary schools. From a critical point of view, the two articles provide alternative arguments concerning the initiatives to introduce Liberal Studies the first time.

2.3.2 Policy Initiatives of MNE

Different from the Liberal Studies initiatives in the colonial period, the MNE policy initiatives were primarily driven by the HKSAR Government’s desire to promote a patriotic, pro-China identity amongst Hong Kong citizens through national education. While some of the thematic reviews considered (Chung 2013, 2014; Leung and Ng 2014; Leung and Yuen 2012; Morris and Vickers 2015) went to great lengths to explore the governmental influences during the period spanning from the 1980s to 1996,² the real watershed moment with regard to the introduction of pro-Beijing national education in Hong Kong was 1997, the year in which China resumed sovereign power (Chan and Chan 2014; Chung 2014). Assessing articles dated from 2000 onwards, this section looks into the initiation of MNE.

In a recent publication, Morris and Vickers (2015) aptly pointed out that the need to cultivate a sense of national pride served as the major cause of patriotic re-education after the handover. Because colonial governance in Hong Kong had lasted 150 years, patriotism towards China was considered weak among the local community, a view echoed by Kan’s (2012) observation that MNE was prompted by a lack of passion and desire amongst youth to understand and honour their ‘motherland’. MNE was thus proposed as a mandatory subject in the primary and secondary school curricula with the aim of supplying students with in-depth factual knowledge of China. In addition to apathy, Morris and Vickers (2015) also contended that Hong Kong citizens’ strong aversion to the Beijing leadership, as evidenced by their demonstration against the introduction of national security legislation in 2003,³ intensified the central government’s urge to reinforce national identity using a more forceful approach. The same opinion was expressed by Pepper (2006) and Vickers (2011). From a more technical point of view, the

²One example is the *Guidelines on Civic Education in Schools* (Curriculum Development Committee [CDC] 1985), which attempted to foster national education in 1985 but was revised with more autonomous elements in 1996.

³On 1 July 2013, a large-scale protest involving over 500,000 demonstrators took place in Hong Kong against Basic Law Article 23. The Article proposed that the HKSAR should enact laws ‘to prohibit any act of treason, secession, sedition, subversion against the Central People’s Government, or theft of state secrets, to prohibit foreign political organisations or bodies from conducting political activities in the Region’. It induced fear in the community that freedom of speech would be threatened, and caused public outrage.

national education measures validate these researchers' claims: not only had national education been given priority in the education policy reforms since 1997 (Chong 2012; Chung 2013, 2014; Vickers 2003), but spending on its development also soared from HK\$5 m to HK\$96 m between 2006 and 2012 (Pao 2012 July 6).

Leung and Yuen (2012), in contrast, argued that the inception of MNE was intended to rectify the government's depoliticisation of civic education from 1997 onwards. In the years after Hong Kong's retrocession, large amounts of content on democracy and human rights that had been passed down from the colonial curriculum were removed from national education and replaced with promotion of Chinese cultural values. Whilst national identity became culturally focused to prevent disagreement (Leung and Ng 2004) and keep Hong Kong an apolitical financial hub (Leung and Ng 2014; Leung and Ngai 2011), the depoliticised curriculum was insufficient to prepare the young generation for the electoral system changes scheduled for 2017 and 2020.⁴ To secure and guide Hong Kong's autonomy towards tighter accordance with the nation's supremacy, the instillation of patriotism through schooling led to the formulation of MNE.

Chung's (2014) comparative analysis of the curriculum objectives in 1996 and 2012 exemplifies the transformation of local civic education. He noted that MNE in 2012 adopted an 'ideological and hegemonic' strategy for education (p. 672), mirroring his assertion in an earlier study (Chung 2013) that local civic education was no longer Hong Kong-based, but rather was reduced to working in favour of China's 'constitutionally centralised' governance over Hong Kong (p. 202). His view of the central government placing national sovereignty above socialist norms and laws (Chung 2013, 2014) also largely concur with the prioritisation and 'patriotisation' of MNE (Leung and Yuen 2012; Morris and Vickers 2015).

Indeed, the concept of integrating national education into the school curriculum through a top-down approach was not new when the Chief Executive Donald Tsang mandated the direct review of the MCE framework in 2010 (CDC 2012), a decision believed to have resulted from pressure from Beijing (Chung 2013; Chan and Chan 2014; Leung and Ng 2014). A similar policymaking tactic in the past was subtler: Tsang's predecessor, Hong Kong's first Chief Executive Tung Chee-hwa, addressed the need to foster national passion, concern and pride through civic education in several of his speeches and his commitment to reform in his 2000 policy address (Chung 2013).

In terms of technical policy changes, various curriculum guides that stressed the importance of building national identity were published in 2001, 2002 and 2009 (CDC 2012). The former incarnation of MNE, MCE, also put emphasis on the formation of national identity through the school curriculum (CDC 2012), as manifested in the need to incorporate school-based national education stated in the

⁴In 2007, the Standing Committee of the National People's Congress (NPCSC) decided that the HKSAR would be allowed a more democratised electoral system, 'with a view to attaining universal suffrage' (Constitutional and Mainland Affairs Bureau 2007, p. 4) for the Chief Executive in 2017 and for the Legislative Council in 2020.

General Guidelines on Moral Education (Education Department 1981) and *General Guidelines on Civic Education in Schools* (Curriculum Development Committee 1985; CDC 1996).

2.3.3 Policy Failures of Liberal Studies

Over the past two decades, a growing body of research evidence has suggested that there was no single reason for the policy failures surrounding the first introduction of Liberal Studies (Tan 1997). The present study explores the collapse of the policy as a result of multiple causes associated with the government's capabilities, teachers' attitudes and schools' authority.

Contrasting reasons for the policy failures are given by Morris and Chan (1998) and Fok (1997). The former placed fault with the government for prematurely introducing Liberal Studies without sufficient preparation or support, whereas the latter, who primarily investigated policy implementation in schools, argued that there was a shortfall in teachers' motivation and ability to carry out the policies. Morris and Chan (1998) identified three substantial areas of government incompetence in escalating schools' commitment to promoting Liberal Studies. Firstly, under government regulations, the discretionary status of Liberal Studies was interpreted by most secondary schools as an optional obligation to introduce the subject. The majority of schools decided to keep their long-established curricula or to maintain the *status quo* by ignoring the policies. Second, teachers believed the Liberal Studies curriculum to be ill-prepared. Because most of the politically sensitive content was left ambiguous in the curriculum guidelines (p. 255), the ad hoc nature and loose status of that content failed to fulfil Liberal Studies' stated objective of promoting critical and independent thinking, and thus directly affected teachers' desire to support or not support the subject. Third, from the perspective of school principals, government support consisted mainly of the production and distribution of policy documents, lacking any extensive in-service training programmes⁵ or classroom resources for teachers (p. 253).

Fok (1997) suggested that the greatest hindrance to introducing Liberal Studies was teachers' lack of initiative and ability in policy implementation. Teachers preferred to adhere to the prescribed and content-led school curriculum because of the

⁵The question of whether there was adequate training available for teachers is debatable. At the beginning of Liberal Studies' introduction, teacher training programmes were chiefly led by the University of Hong Kong and the Education Bureau (formerly known as the EMB). Each of the six Liberal Studies modules was accompanied by 18 h of preparatory courses, i.e. a total of 108 h, on pedagogical practices. These programmes lasted two years and had an enrolment of approximately 300 teacher participants. In view of these training programmes provided by EMB, some researchers contended that it was the refusal of the universities to accept Liberal Studies as an admission subject, rather than insufficient in-service training that was the singular cause of the subject's failed implementation.

highly competitive nature of public examinations rather than to make an attempt at the Liberal Studies curriculum, which was not even recognised by local universities as an admission subject and was thus academically worthless in some teachers' eyes. He argued that their apathetic attitudes towards an innovative curriculum even rendered many unwilling to engage with any concepts related to Liberal Studies. Moreover, in the past, teachers were not allowed to involve themselves in political teaching in schools (p. 94). They were unfamiliar with conducting discussions related to the political topics in the Liberal Studies syllabus, and their limited experience of political education thereby called into question their ability to teach it.

The foregoing reasons outlined by Morris and Chan (1998) and Fok (1997) show that both the government and teachers were passive in their shared responsibility to implement the first incarnation of Liberal Studies. On the one hand, the government initially expected schools to generate and develop the new subject on their own with very preliminary support; on the other, teachers depended on external assistance to guide them in teaching a non-statutory subject. The result, as reality attests, is that Liberal Studies was bound to constitute a half-abandoned policy in its first establishment.

Perusal of the selected literature suggests additional reasons for the failures pertaining to the introduction of Liberal Studies. For example, Morris et al. (2000) pointed out that the expansion of public schooling in Hong Kong was largely achieved through the work of missionary groups in the 1950s. These groups desired to teach their religious beliefs and enjoyed a high degree of freedom to select what they taught for more than 40 years. This situation placed limits on the government's power to control the subjects that were taught in schools and made it impossible for the government to compel secondary schools to adopt Liberal Studies. Morris et al. (2001) further explained the policy failures by considering the substantial gap between the intended and implemented curriculum. This gap, which was created by the significant differences between the curriculum's objectives and the perceptions of school principals and teachers, severely sabotaged the potential effectiveness of the Liberal Studies policy. The emphasis on citizenship education in Liberal Studies was perceived by teachers as prescribing correct attitudes and the maintenance of order and discipline to students, which was far from the original aim to provide students with an unbiased and better understanding of Hong Kong and mainland China and their political interrelations.

2.3.4 Policy Failures of MNE

MNE failed at a more fundamental level than Liberal Studies rather than simply because of barriers to execution brought about by an ill-prepared initial introduction. Whilst the collected thematic reviews evaluate MNE's failure from multiple perspectives, including its controversial curriculum content and redundant subject nature, the root cause is often ascribed to the public's distrust of the government's policy design. Regardless of the authority's hierarchical endeavours, building

national identity through mandatory sentimentalisation has been shown to be an arduous, perhaps even counterproductive and impossible task, in Hong Kong.

Leung and Ng (2014) narrow the lack of public support for MNE down to two major factors: the politically indoctrinating curriculum and the questionable necessity of the subject. The idea of imposing political ideology on students instead of guiding them towards a critical understanding of information led many to question the government's trustworthiness in designing the MNE curriculum. Kan (2012) provides evidence to suggest that the public's mistrust was not without foundation. For one thing, in 2000, Chinese History was removed as an independently taught subject even though it was supposed to provide a neutral and comprehensive source of information for students to understand and acquire knowledge of their motherland. Kan (2012) also spotted a 'dubious link' (p. 64) in the financial sponsorship arrangements amongst the HKSAR government, pro-Beijing organisations and Hong Kong-based educational institutions. A case in point is dissemination of the 'China Model' handbook, which was compiled and published by the National Education Services Centre, a pro-Beijing institution that is heavily reliant on funding from the Hong Kong government. This handbook, although the Education Bureau denied that it constituted formal teaching material for MNE, became notorious for the 'brainwashing' nature of its content and was widely condemned. Such an explicit application of political interests understandably resulted in the public's conviction that the government was promoting indoctrinated patriotism in the name of national education.

The credibility of the MNE curriculum was further tarnished when, as Leung and Yuen (2012) suggested, many proposed concerns were not addressed in the finalised curriculum guide issued in April 2012. Teachers continued to find overlaps between the MNE syllabus and existing subjects, and they also found the teaching schedules unacceptable and suggested that the assessments were overly vague and difficult. Coinciding with Leung and Ng's (2014) argument about the questionable necessity of MNE, other researchers have concluded that teachers' reactions reflected an absence of confidence in the government's policy decisions (Chung 2013; Cheng 2002).

Adding to this are Morris and Vickers' (2015) insights into the postcolonial city's inherent scepticism towards national identity formation. They describe Hong Kong people's fierce resistance to patriotic education as a deep-rooted bequest from the period of British governance, a spirit that refuses to allow educational indoctrination by the state. Curricular manipulation thus proved ineffective and even counterproductive when MNE was forcibly introduced. Support for this view can be found in Chung's (2014) argument that the local community did not blindly follow the government, and became actively provoked when the politicisation of education began to intensify. The fact that a revised civic education policy was passed in April 2008 without public consultation,⁶ suggests that the public was right

⁶The policy revision was a renewed curriculum framework (EDB 2008) disseminated only in Chinese, entitled '[T]o collect a hundred rivers, enrich young seedlings with moral rain' (original

to call the government's top-down policymaking procedures into question, as Chung (2014) notes. It seems that the lack of trust in policy implementation essentially demolished the foundation of attempted nationalism, rendering MNE unsuccessful by default.

Two other factors possibly played a role in MNE's failure: the long-standing practice of school-based civic education (Chung 2013; Morris and Vickers 2015) and rallies by ethnic minorities in defence of their rights in an international city (Kan 2012). Firstly, educators were not ready to accept MNE as a new compulsory subject, as it had formerly been an optional subject assessed only by extracurricular activities. Secondly, under the threat of being marginalised by a one-sided nationalistic curriculum, local non-Chinese minorities teamed up with other MNE opponents in the fight against the curriculum. The Hong Kong Alliance for Civic Education, for instance, was founded in 2002 to help safeguard the impartiality of school materials to protect the interests of the various ethnic groups living in Hong Kong. In October 2012, the planned introduction of MNE came to a halt when Chief Executive Leung Chun-ying admitted that the subject's implementation had not only obstructed school operations, but also polarised society (Cheng and Chan 2015; Chong and Tam 2012).

2.3.5 Parallel Discussion of Liberal Studies and MNE

It is important to note that we consider Liberal Studies and MNE in juxtaposition for a reason. As made clear in the foregoing sections, the policies surrounding the two subjects' introduction share some distinct features arising from the Hong Kong context. However, they differ widely in the trajectory of their final execution. Before applying Ball's policy cycle framework, we here sum up by comparing and contrasting the two education policies.

First, Liberal Studies and MNE both constituted reintroduced curricula. Liberal Studies was first proposed as an AS-level subject in 1992, and became part of the NSS curriculum only in 2009, whilst MNE was initiated in 2011 to replace its former incarnation as MCE. Both policies underwent similar procedures in being promoted by the authorities, Liberal Studies by the Education Bureau and Curriculum Development Council and MNE, in a more explicit manner, by the Chief Executive. Their initiation and related reforms were highly 'top-down', which was common practice in colonial Hong Kong. Second, part of the purported aim of both subjects was enhanced citizenship education. The Liberal Studies curriculum,

(Footnote 6 continued)

text: 匯聚百川流. 德雨育青苗) (Chung 2014, p. 671). Approved by the Moral and Civic Education Section of the Education Bureau, the framework went unnoticed by many policy researchers and became known to teachers only after the change was issued as an administrative process in March 2009 (Chung 2014).

for instance, is characterised by the ‘Hong Kong Today’ and ‘Modern China’ modules, which are designed to strengthen students’ knowledge of local and national affairs. Later, when national elements were considered to be lacking in local education, MCE was revised with reference to such teaching materials as the ‘China Model’ handbook and then proposed as MNE. Finally, both Liberal Studies and MNE are multidisciplinary subjects whose curricula cover a range of learning topics with a key vision to broaden students’ horizons.

The differences between Liberal Studies and MNE, as this book will continue to demonstrate, lie in their divergent development. Liberal Studies was initiated with two rounds of consultation lasting about two years, whereas MNE was given a one-off consultation that lasted just four months. Liberal Studies continues to thrive as a compulsory subject in the NSS curriculum, whilst MNE remains an optional, school-based subject with no assigned syllabus. In the chapters that follow, we will apply Ball’s policy framework to the policies of both subjects, and study the two cases in parallel. This chapter concludes with a summary juxtaposing the evolution, formulation, critiques and application of the two policy analysis frameworks, which is presented in Table 2.2.

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