The Comparative Education Society of Hong Kong

Comparative Education Bulletin

No. 7 (2004)

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The Comparative Education Society of Hong Kong (CESHK) was founded in 1989. Membership of the society is drawn from educational institutions in Hong Kong and the Asian region. CESHK provides a forum for the exchange of views, development of partnerships, and shaping of new initiatives. The society is a member of the World Council of Comparative Education Societies (WCCES), and its officers have contributed to the functioning of that body. In the process, this work has given Hong Kong visibility within the wider arena. Among the activities of the CESHK is the annual conference. Through this, and other activities such as seminars, workshops and the society's publication, the *Comparative Education Bulletin*, CESHK brings together scholars across institutions. The CESHK has organized and will plan to have more study tours to enrich members' experiential learning of comparative education in the region.

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CESHK membership entitles you to participate in a wide range of activities, such as seminars, conferences, and study visits. Members enjoy a 20% discount on books published by the Comparative Education Research Centre at the University of Hong Kong, and a reduced registration fee for the WCCES's World Congress of Comparative Education. Subscription fees for 2004 are HK$150 (HK$100 for students).

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Introduction

Greg Fairbrother and Joshua Ka-ho Mok

This issue of the *Comparative Education Bulletin* deals with a wide range of issues related to comparative education and broader educational concerns in Hong Kong, Singapore, Taiwan, and Mainland China. Its articles cover topics including curriculum and textbooks, home-community-school partnerships, school vouchers, educational decentralization, human resource development, cultural minority students, cross-cultural understanding, and the role of, and challenges to, comparative education itself.

The first three articles deal with issues in the field of comparative education. Lynn Davies, in a special contribution based on her Keynote Address to the 2004 CESHK Annual Conference, examines the role of comparative education in challenging commonly-held notions about education and economic development, education and conflict, and education and social justice. She also proposes an agenda for comparative education research in the age of globalization to demonstrate how the field can contribute to a better world. Percy Kwok offers a brief history of organized comparative education in Hong Kong and Macau, deconstructing the discourse of the CESHK 2002 conference and surveying developmental trends in the local field. He also draws attention to the challenges of globalization for comparative education in the international city that is Hong Kong, and offers a number of suggestions to face them. Stressing the importance of sensitivity in carrying out research using textbooks, Jason Nicholls conducts a critical survey of two comparative studies of the portrayal of World War Two in school textbooks. He concludes that textbook researchers must deal explicitly with methodological issues in order to contribute meaningfully to scholarly debate.

The next set of articles report on some of the latest research in the field. Maria Manzon examines parent and community partnerships with schools in Hong Kong and Singapore, and identifies key local and global influences on their evolution. Anthony Lau compares music curricula in Hong Kong and Taiwan, focusing on the balance of Chinese and non-Chinese music content. Both of these contributors draw attention to the influence of foreign models, education, and training on educational phenomena in Asian contexts. Hu Jingfei, on the other hand, contrasts school voucher policy in Changxing county, China, where public funds are used to support *minban* and vocational schools, with foreign policies which are aimed at enhancing students' school choice and increasing competition among schools. Reporting on research human resources development, Wang Rui discusses influences on knowledge, attitude, and skill requirements among workers in given workplace contexts in Eastern

and Western China. Based on a survey of workers in Shanghai and Chongqing, she analyzes their understanding of the importance of different skills. Finally, two reports deal with questions of multiculturalism in Hong Kong. Stella Chong focuses our attention on the problems faced by new immigrant children from Mainland China in Hong Kong's schools. Based on her findings, she offers a number of recommendations for policy related to education for minority students. Jan Westrick presents the findings of a study of intercultural sensitivity and student involvement in service programs at the Hong Kong International School. Bringing us back to key issues for the field of comparative education, she suggests that the diverse student bodies of international schools are in essence a microcosm of the samples that comparative educationists seek in conducting cross-national research.

The *Comparative Education Bulletin* is just one of the vehicles through which the Comparative Education Society of Hong Kong contributes to discussions of theory, research, and method in comparative education. Several of the articles here have been drawn from papers presented at past CESHK annual conferences. Current and new members of the Society are invited to participate in the dialogue at the upcoming 2005 conference, "Approaches and Strategies in Comparative Education," to be held at the Hong Kong Institute of Education on Saturday, January 29, 2005. More details of this and CESHK's other activities may be found at www.hku.hk/cerc/ceshk.

Compared to our previous issues, this issue of the *Bulletin* is much thicker in terms of volume. More importantly, this issue has successfully incorporated articles from different parts of the world to strengthen the comparativeness of the bulletin. What also makes this issue different is the introduction of recent books and other works of CESHK members. In future issues, we plan to have more critical analysis and deeper reflections on comparative education by encouraging members and academics, practitioners, and friends working in the field of comparative education to publish their works in the bulletin. The success of the *Comparative Education Bulletin* depends very much on your continual support and contributions.

Comparative Education in an Increasingly Globalised World

Lynn Davies
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Introduction

> There are well over 50 million teachers around the world and nearly one in five persons alive today is either a pupil or a teacher in a formal education institution. (UNESCO, 1999)

In this paper I would like to argue that comparative education has possibly never had such an important function than in this age of different globalisations. This paper identifies two seemingly contradictory but eventually complementary roles for comparative education: firstly destroying myths and fighting simplistic or dangerous universalisms; and secondly extracting signs of hope which show how education – both within and regardless of culture – could contribute to a better world.

After defining what is meant by "increasingly globalised," I prioritise three crucial types of relationships for scrutiny: the relations between education and economic growth or sustainability; between education and conflict; and between education and social justice. In each of these there are myths to be debunked and serious challenges to contemporary orthodoxy. In terms of economic growth, comparative education can help mount the challenge to the taken-for-granted assumption that neoliberalism, competition and markets are the only way to organise economic and hence educational life. In terms of conflict, comparative education can reveal the sad reality that formal schooling contributes more to conflict and violence than it does to peace. In terms of social justice, there are myths to be debunked about education necessarily contributing to less ethnic division, to greater gender equity or to breaking down divides between rich and poor.

The paper sets these three types of (highly linked) relationships against some conflicting features of contemporary globalisation. These include markets, transnational corporations, competition, revivals of nationalism and identity politics, knowledge management control and lifestyle consumerism/culture, but also – more positively – the spread of democracy and human rights and the growth of international protest. In my current work I use complexity theory to understand social phenomena, and would argue not only that trends are non-linear, but linked in highly complex ways. Small turbulences can make an impact. This is both depressing and exhilarating for educationists and for commentators on education.

The first task, to question generalisability, is not just saying that context matters – comparative education has always said this – but that spurious or romanticised claims for the benefits of education wherever found need to be challenged. Why doesn't education always promote economic growth? Why has education failed to prevent war? Why has education failed to promote social justice, whether across the globe or within a nation? And in contemporary terms, how has globalisation further influenced these tenuous relationships?

Much writing is demonstrating the effect of globalisation on education – but it is less easy to look at the reverse, the effect of education on new and old global realities. Academic writing about globalisation is often written by "us" about "them": Luke and Luke (2000) argue instead for a cultural politics of the local, to show the complexity of the multidirectional traffic of "flows." We should avoid the globalisation of the discourses of globalisation. Or the irony of a sign that was spotted at the World Trade Conference: "Join The World Wide Movement against globalisation." I would agree with Anthony Sweeting (1999, p. 278) therefore, that comparative education can usefully be done in one country, using comparisons of time and history. I like his claim that "non-linear, almost random, outcomes of educational practices seem almost daily occurrences."

The second of the important tasks is not just to reveal realities, but to build a profile of how comparative education has actually influenced policy. Reynolds and Farrell (1996) have had this influence in UK, it seems, through their highlighting of the supposedly superior performance of Pacific Rim countries in international surveys of educational achievement. Their study of Taiwan, however, significantly omitted reference to the largely homogenous nature of Taiwanese society, the common language and the role of the family in supporting education, as Watson (1999) pointed out. But we should be looking at not just the bi-lateral transferability of policy and practice (the "what works" syndrome), but broader political questions about what education is for, and whom it benefits.

Broadfoot (1999, p. 25) defines comparative education as "centred on the more general project of explaining and exploring the nature of social life and conceptualising this in a way that provides both insight and guidance concerning how learning may best be facilitated and provided for in a particular time and place." But does this go far enough? Learning about what? Learning to do what? Do we want to facilitate learning in a terrorist training camp? Who decides what constitutes useful learning? Are these decisions becoming globalised?

Globalisations

First perhaps we need a brief review of the different sorts of globalisations that are occurring. The usual types cited are:

- The spread of common world culture, or the homogenisation of culture and even language
- The ascendancy of a particular form of capitalism, championed in North America and parts of western Europe as the attainment of ideals of free trade liberalism
- Knowledge transfer and increased ICT
- More personal mobility
- The spread of democracy, human rights and environmental concerns

Jones (2000) in fact distinguishes globalisation and internationalism – the former the emergence of a world economy and the latter the development of global solidarity through democracy and peace.

But typical concerns have been expressed, such as:

> … strong Americanization which threatens to overwhelm all forms of identity that are not minor variations of global themes. (Marginson and Mollis, quoted in Stromquist, 2002)

> globalisation and dehumanisation are two faces of today's capitalism, which is more productive than ever. (Queseda Monge, 1998)

> … the euphoric marketing rhetoric of the global village, an incredible place where tribespeople in remotest rain forests tap away on laptop computers, Sicilian grandmothers conduct E-business and "global teens" share, to borrow a phrase from a Levi's Web site, "a world-wide style culture." Everyone from Coke to Macdonald's to Motorola has tailored their marketing strategy around this post-national vision, but it is IBM's long-running "solutions for a Small Planet" campaign that most eloquently capture the equalizing promise of the logo-linked globe. (Klein, 2002, p. xvii)

Globalisation is seen as not decentered, but as having definite points of origin – initiated by advanced industrial countries (Stromquist, 2002). Today's globalisation seeks the union of science and industry; the apoliticisation of unions; the organisational fragmentation in the production process; the globalisation of cultural, information and business networks; and the unification and standardisation of pleasure and consumption.

Globalisation is felt in education largely through the uncontested adoption of initiatives in developed countries along such lines as decentralisation, privatisation, the assessment of student performance and the development of tighter connections between education and the business

sector (Stromquist, 2002). We should also not ignore the power of regional blocs: NAFTA left out explicit references to education, which meant it could be defined as "any other tradeable good or service." A recent paper in the journal *Globalisation, Societies and Education* (Schugurensky and Davidson-Harden, 2003) examines the educational dimension of the General Agreement on Trade and Services (GATS) of the World Trade Organisation (WTO), which is a strategy to transform education into a tradeable commodity, with a free educational market. They argue that Latin American countries can be adversely affected by this in terms of their sovereignty on cultural policy, the quality and accessibility of their public education systems, the training of scientists and researchers oriented towards national development, and the contribution of their education systems to the common good and to equalisation.

The EU on the other hand sought the creation of a European identity, operated through benchmarks and performance indicators as a means of bringing together different national goals and aspirations for education in a more coherent way at the European level. APEC wanted Information Technology as a "core competency in education," with lots of networking, and links between education and business (Dale and Robertson, 2002).

Burbules and Torres (2000) in their important collection on *Globalisation and Education* therefore identify three trends in educational writing and analysis:

- Policy buzz words such as privatisation, choice, decentralisation; research agendas based on rational organisations and management theories
- The role of national and international organisations in education, including teacher unions, parent organisations and social movements
- New scholarship on race, class, gender and the state in education – multiculturalism, identity, critical race theory, feminism, postcolonialism, diasporic communities, and new social movements

It is worth at this point examining the ideology of markets, as one of Burbules and Torres' "policy buzz words." The market does not have behaviour attributes and does not make political commands. It is institutions and decision-makers who are market makers and not merely market takers. Petras (1999) includes individual level actors in this – such as professionals and consultants, who shape the economic programmes of developing countries to maximise the global interests of multinationals and receive lucrative fees.

There are some interesting studies which demonstrate the dodgy effects of economic rationalist approaches, as those prototyped in the UK

and then exported. Luke and Luke (2000) examined the Rajabhat Institutes in Thailand which have been enabled to set their own fee levels and establish businesses. So-called reforms meant funding cuts of 25-30%. The tendency across Asia has been for central governments to attempt to emulate Western systems' responses to decreased funding, to new curriculum demands, and to changing student populations. As consultants, Luke and Luke had difficulties in contributing to such educational change, as they knew that 1) such reforms had not generated the kinds of productive results promised in Australian contexts and 2) local and regional impacts of globalisation are best addressed by locally driven curriculum development, innovation and institutional reorganisation. Is this an irony, that globalisation is best dealt with locally? When you translate the steering from a distance of Thatcherite Britain (quality assurance, performance indicators, corporate systems of accountability) it tends to get hybridised and indigenised – and not work.

James Porter in his 1999 book *Reschooling and the Global Future* is excellent on the way that a deeply flawed market ideology has been uncritically accepted in education, as elsewhere. He examines the key ideas of market economics and "competitive equilibrium" and the assumptions behind them – that all human conduct can be related to a ranking of economic choices and weighing up costs and benefits, and that the various transactions are optimal and balance out for everybody. It is an astonishing influence. But the theory does not explain actual behaviour of real people in uncertain conditions and without the information and computational capacity to make so called "rational" choices. Again, this is a linear approach applied to complex, non-linear situations and actors. He quotes Ormerod:

> The promotion of the concept that the untrammelled, self sufficient, competitive individual will maximise human welfare, damages deeply the possibility of ever creating a truly affluent cohesive society in which everyone can participate. (1994, p. 211)

Yet free market economics provide a powerful legitimising framework for the continued existence of privileges, or unrestricted individualism. Industries and services have to be privatised and the market deregulated, with the state not interfering. This means a reduction in state services and in democratic concerns about welfare, justice and security.

> It is difficult to avoid the conclusion that those in established positions of power have embraced a particular and largely erroneous economic theory because it consolidates their supremacy and control (p33) … The idea that a government can produce economic success and full employment by edict through the school

> system is quite mythical and ignores the hard facts of globalism and the decline of national independence. It is also evident, that while government focuses so centrally on achieving high national economic yields in a competitive world, they fail to confront the reality of the inequalities within and between societies. (Porter 1999, p. 66)

But is democracy also being spread globally, to counter such tendencies? Perhaps only particular versions are. It has been argued by western lenders (and endorsed through various conditionalities) that democracy is needed as the life support of globalisation, as a free market requires massive information to be circulated and unfettered initiative to materialise. Yet we see that international agreements can be achieved without necessarily engaging in respect for human rights or equity. Only a particular and narrow version of democracy is adhered to. It was interesting that an adman for *Our Master's Voice* said in 1934:

> A democratic system of education….is one of the surest ways of creating and greatly extending markets for goods of all kinds and especially those goods in which fashion may play a part. (quoted in Klein, 2002, p. 87).

Let us turn then to the evidence base for the positioning of education in all these movements – or stagnations.

Education and Economic Growth or Sustainability

In spite of frequent questioning, the link between education and economic growth remains one of the underpinnings of education and aid policy internationally. So what is new with the advent of globalisation in terms of policy analysis? Not a lot, it would seem. The World Bank clings to a human capital theory approach. This is not surprising – it is a bank, and banks survive on investment. How we ever let a bank decide educational policy will be a puzzle for educational anthropologists of the future. It is the equivalent of NatWest deciding the curriculum, or the Hong Kong and Shanghai Bank telling us the length of the school holidays. The Bank's *Education Sector Strategy* reveals no new thinking, no mention of education as a basic human right.

Crossley and Watson (2003) point out that the World Bank largely ignores educational research undertaken by non-Bank staff; it is still predicated on human capital theory which sees education solely as a means of economic expansion; it ignores local analyses and knowledge; and ignores the interdependency of education, health, rural development, the environment and economy (and I would add the political and stability con-

text); and the fact that education cannot be treated as a sector isolated from society as a whole. It ignores the causes of global poverty and ignores the academic critiques of the Bank's role in actually extending poverty.

Economists such as Stiglitz (2002) make a fundamental criticism of IMF/Washington consensus approach – it does not acknowledge that development requires a transformation of society. Uganda understood this in its elimination of school fees, against the advice of economists. Stiglitz criticises the new "trickle-down plus" – the new version of the idea that growth will automatically help the poor, and structural adjustment will in the end somehow benefit education. In Latin America, growth has *not* been accompanied by a reduction in inequality, and in some cases poverty has increased. In fact it was land reform which preceded several of the most successful instances of development, such as in Korea and Taiwan – not on the Bank's agenda. Access to education *may* alleviate poverty, but we need the studies which tell us in conjunction with what other factors. Similarly, we need to know about the role of education in conjunction with what might protect against economic collapse, as can be seen in parts of Russia or Eastern Europe.

Stiglitz' argument is that government can play an essential role in mitigating market failures, slumps, recessions or depressions that lead to massive unemployment. In the USA and East Asia, governments have done this reasonably well. They have provided a high quality education to all and furnished much of the infrastructure – the legal system, regulation of financial sector, safety nets for the poor. He admits the debates – how concerned should we be about the environment if we can have higher GDP, how concerned should we be about the poor, how concerned should we be about democracy and rights – but he argues for government intervention to compensate for market failures. The Asian financial crisis was brought on by a lack of adequate regulation of the financial sector, and Mafia capitalism in Russia by a failure to enforce the basics of law and order.

But all the linkages can be ignored in educational research. As James Porter argues, there has been unprecedented attention to education. Since success in the global economy has come to be seen as vital for national survival, the economic purposes of the school have come to dominate the political agenda. Education reform is seen as crucial to economic progress. The World Bank insists that aid and loans are tied to the use of education for competitive participation in the global economy.

> As signs of global alienation and insecurity multiply, the growing pressure to control and limit education threatens to rob societies of a vital resource for sustaining democracy and for developing

> the creative and varied responses that will be called for in an increasingly uncertain future. (Porter 1999, p. 7)

Yet Jürgen Schriewer (1999) in an interesting chapter "Coping with complexity in comparative methodology" examines the findings produced by international comparative education research on the connections between education, modernisation and development. What links there are between education, economic growth and employment, for example, are highly complex, indirect and certainly not linear, nor do they produce the same effects in different societies. "Instead they are as a rule not very pronounced, only partially effective, basically dysfunctional, or simply counter-productive" (p. 40). This relates to the old and obvious point about education being simultaneously a producer of social mobility and an agent for reproduction of the social order. Hence the failure of grand theory, of the grand narratives. Comparative education research tends to produce falsifications; but does anyone listen? Complexity is not popular. Simple solutions and lines of rationality are preferred.

One example of complexity is the impact of vocational education. Schriewer reports on the increasingly extensive body of comparative research dealing with the interconnections between vocational education and training, qualification structures of the labour force, and work organisation in large-scale manufacturing units. He says:

> Such studies have taught us to thoroughly distrust the thesis – posited by industrial sociology and the economics of education – stating that qualification-requirements and educational structures are largely determined by technological change, economic development, and the exigencies of a universal rationality purportedly intrinsic to industrialism (1999, p. 39)

Instead, the studies have insistently shown us that vocational education and training is to a large extent determined by social and cultural factors. Strangely, educational systems appear relatively autonomous in this regard.

A recent study reported on the ID21 website (Appleton, 2004) asked whether investing in education reduced poverty, and provided evidence from Ghana, Uganda and Malawi. Some curious facts emerged:

1. Almost universally, education is found to lift people out of poverty
2. But when compared with other forms of investment, the returns on investing in education are on average lower
3. Thirdly, the returns in terms of increment in income are much higher for those with higher levels of education

4. Macro evidence does not support the view that investing in education has an impact on underlying productivity growth.
5. The returns to education are lower in the rural than in the urban sectors – with the result that one of the effects of education is to encourage a shift to the urban sector
6. Greater electoral competition leads to greater expenditure on primary education

Walter McMahon (2003) (a World Bank economist) in some ways tackles complexity in distinguishing direct impact and indirect impact, as education operates through other variables such as the wider diffusion of technology, as well as private and social goods. One additional year's schooling is associated with about 30% higher GDP per capita – but which came first? Education affects health – but is this indirect in terms of being able to buy better health care? There is nonetheless the claim that education contributes to a larger and stronger middle class, to civic institutions and hence to greater political stability. In spite of a lot of overstatements of governments to UNESCO and other holders of statistics about enrolment rates and their country's investment in education, "pure externalities" include lower population growth, strengthening the rule of law, more community involvement and greater dissemination of knowledge. (Interestingly, education is associated with less water pollution but more air pollution). However, what McMahon does not acknowledge is that all these positive effects are *internal* to a country, and ignore the effects on *other* countries of one country's growth or political stability. An "educated" population does not necessarily challenge aggression towards another country, nor the source of their own economic prosperity through certain sorts of trade or imperialism. This is a vital omission in cost-benefit analysis of educational effects – and one where comparative education could have a crucial role.

There are interesting points too about democracy. Essentially all countries in the world with per capita incomes below about $600 are authoritarian. The one exception is India. Military expenditure has a negative relation to democratisation. It could be that democracies spend less on the military and more on education; but McMahon suggests that rising income contributes to democratisation. Some regimes hang on longer with large military expenditure (North Korea?), but the eventual change over to fragile democracies from military dictatorships has been remarkable in the last 40 years in Latin America. The impact of secondary education is largest when there is a control for larger military expenditure, since the latter appears to contribute to rural poverty.

The problem with all this analysis is however that effects are *very* long term. Human rights increase by 8% in Africa on the average *40*

years after education investment is increased by 2% of GDP. Most impacts are long delayed. This is a problem for comparative education.

Achievement

But let me look at some of the relatively quick falsifications that we can engage in. Comparative education can destroy the myths about the relationship between test scores and economic growth, for example. In US and elsewhere, there is a culture of blaming schools for contributing to a less competitive global economy, less productivity, losing jobs to other nations. The false connection between test scores and economic growth then leads to calls for privatisation, a longer school year, more testing and more technical skills (Cuban, 2001).

Porter (1999, p. 82) quotes what Charles Handy has described as the "MacNamara fallacy":

> The first step is to measure what can be easily measured… the second step is to disregard that which can't be easily measured or to give it an arbitrary quantitative value. This is artificial and misleading. The third step is to presume that what can't be measured isn't really important. This is blindness. The fourth step is to say that what can't be easily measured doesn't exist. This is suicide.

He also quotes me and others in the anti-school effectiveness movement, arguing fiercely how school effectiveness research dehumanises pupils – and teachers – by reducing them to "intake variables"; there is a cultural deficit, a stereotypical approach which appears to sympathise with the "underachieving school" for the "poor quality" of its intake. Alexander (2000) did challenge some of the simplistic "border crossings" of school effectiveness studies (arguing for Pacific Rim practices of desks in rows for example) by his contextualised and cultural studies of five countries. But much more is needed – particularly about comparing educational goals, not just processes.

Carney (2003) argues that global managerialist tendencies in education such as those represented by school effectiveness research actually *distort* the possibilities for schooling to contribute to societal development.

> Evidence suggests that a focus on the technology of school effectiveness encourages narrow definitions of good schools and, in the process, enables powerful groups to unduly distort education for their own purposes. (p. 91)

The role of formal schooling in the production of broadly educated, competent and democratic citizens is thus compromised. The Basic and Primary Education project in Nepal shifted from inputs such as curriculum and books to "processes and outcomes," especially managerial efficiency and improved exam pass rates. This particular approach to "quality" created space for donor-funded achievement studies that shifted attention away from the Government's overall policy objective of democratic and inclusive schools, towards the technical and managerial inputs required to enhance pupils' cognitive development. And this adds to inequality, to new forms of privilege.

In research terms, Carney asks for breaking the tight coupling between educational research, policy and international comparison that characterises the School Effectiveness tradition, and to engage in forms of inquiry that locate issues of social inequality within considerations about schooling. We need *critical ethnography* – how stakeholders interpret various acts that constitute formal schooling. Are families actually colluding with policy makers about credentialism? Perhaps only the middle class are; for rural people, it is a respite from oppression – or they are unaware of the benefits it might bestow.

This leads to the problem of testing and assessment. Business norms are being applied to education through a) "efficiency" in the transmission of knowledge (coverage, impact at lowest cost) and b) "equity" in the shape of high standards for all, the competitive "world-class schools" syndrome. Another irony is that globalisation and the spread of neoliberalism seem to lead to a greater emphasis on *national* level measures of economic growth and sustainability, instead of regional ones. But this blames failure on the schools themselves. Accountability is operationalised on testing, and is standardized, particularly in "high stakes" testing (those used for major decisions such as graduation). But even economists admit that current achievement tests are not strong predictors of economic success. 96% of variance in earnings in USA are not explained; only 6% of supervisory ratings correlate with education (Levin, 2000). Now, this isn't comparative education: but why is this not replicated in lots of countries? In the developing world, testing has also become a major practice. Before 1991, only 4 countries in Latin America (Chile, Colombia, Mexico and Costa Rica) practiced nation-wide evaluations of basic education. By 2000, almost every country in the region was attempting to test student performance. In the adoption of the testing policy, UNESCO has played a role, so has IDB, World Bank, the Organisation of Iberoamerican States in Spain and USAID – all investing in assessment.

As can be seen, testing is not about diagnosis, but about *competition*: as Stromquist points out, public/state schools are seen as essentially deficient because they operate under monopolistic conditions (with no

incentives to perform well). Therefore there are prevailing voices for privatisation and/or competition to increase standards, improve efficiency and reduce costs, together with the ideologies of parental choice and vouchers. We need to look at the implications of the state shifting from a provider of goods and services (schools, teaching, credentials) to a buyer of goods and services produced in the private sector. This means comparative analysis. Our own European study of pupil democracy found countries like Sweden and Denmark (economically successful, very peaceful, with a low income distribution gap) had features such as children not starting school until 7 years old, bans on competitive publication of results and encouragement of democratic participation in schools, with pupil consultation and real choice on curriculum (Davies and Kirkpatrick, 2000). Yet the UK does not look at this. Instead, it wants testing and national curriculum brought down to nursery level, i.e. longer surveillance and narrower curriculum, and even more emphasis on standards and measurable results.

Literacy

Crossley and Watson (2003) examine the perennial debate over the relationship between literacy and economic growth. The UNESCO major report *World Illiteracy* in 1957 had three principles: that the best way of eradicating illiteracy is through primary education (a view which continues right up to Jomtien); that the higher the levels of literacy, the greater the level of economic development; and the greater the diffusion of literacy throughout the society, the greater the likelihood of industrial and economic development. At the time, there was little research evidence to support these assertions, but they have never really been challenged. These powerful messages, coming from such an august international body, profoundly shaped the thinking and actions of many governments. There has been much analysis subsequently about thresholds (that you need 40% to begin economic development) – but in fact India only claims to have reached 50% during the last few years of the 1990s. There is no agreed definition of literacy; and the global agendas have ignored the many different "literacies" in a culture, and how language is used culturally in daily discourse in different settings. Has the emphasis on supporting international languages hampered educational development, destroyed local textbook production in indigenous languages and weakened local cultures? (see Brock-Utne's [2000] scathing critique of "recolonizing the African mind")

Similarly, Anne Hickling-Hudson launches in, criticising as dangerous and simplistic the World Bank's assertion that advances in literacy may have done more to improve the human condition than any other public policy:

> The way literacy has been used to solidify the social hierarchy, empower elites and ensure that people lower in the hierarchy accept the values, norms and beliefs of the elites, even when it is not in their best interests to do so. (2002, p. 568)

Computer literacy should be not just about technical skills, but social/political analysis. The spread of communications (and increased mobility of peoples, and tourism) has also led to increase or globalisation of prostitution, child abuse or pornography etc. (Stromquist, 2002). The internet gives crime an extraordinary facility to engage in drugs and the arms trade, and to launder earnings through immediate investment in stocks. Learners need a critical analysis of this. I would argue not against literacy, but for different definitions of functional literacy which, simultaneously with basic decoding, begins from political literacy and health literacy. It is an irony that while economic models of schooling predominate, few schools would have economics education as the top compulsory subject.

Education and Conflict

I turn now to the second main area of impact of education. Despite the lack of a demonstrable cause and effect relationship between poverty and conflict, nonetheless out of the 40 countries furthest away from the international development goals, some 24 are in conflict or emerging from conflict (DFID, 2000). Conflict has a self-sustaining nature: the state has often lost the monopoly over decision-making and there is large scale availability of arms. The diminishing economic power of the nation state links to consolidation of mass unemployment in most developing countries and the rapid growth of similar conditions of enforced idleness in the industrial nations. Hence the regional trading blocs and a growth in protectionism; and, more sinister, an extension of military power.

Where is education in this? While increased access to schooling can be shown to help political stability within a country, comparative analysis can question the myth that universal formal education also automatically creates international harmony.

In my recent book *Conflict and Education: Complexity and Chaos* (2004) I have examined the complex relationship between education and conflict. There is the more obvious effect of conflict on education itself – disruption, loss of physical and human resources, hardening of attitudes to the enemy, to the outgroup; but there is the perhaps less obvious impact of education on conflict. I firstly trace three sorts of contributions to the roots of conflict: social inequality or polarisation; dominant forms of competitive and macho masculinity and militarism; and hardening of eth-

nic or religious identifications rather than the encouragement of hybrid identities. Globalisation brings permeable borders, increasing diversity and awareness of diversity, but sometimes leading to a hardening of identities, as I saw in Bosnia and Kosovo.

I then look at specific actions in schools: curriculum, physical and symbolic violence and forms of retribution, cadet forces, and individualistic competition rather than collaboration – not helped by the league tables and the competition between schools and between countries mentioned earlier. I do look also at the possibilities for citizenship education – which is in itself increasingly globalised, as are concerns about "global citizenship," where we have a research project – and examine various sorts of peace education. But schools are far geared to preparation for war than preparation for peace.

As Porter so eloquently comments,

> The efforts to ameliorate the steadily growing divisions in the world are marginal and are failing to stem the dangerous and ultimately disastrous descent into a world that is so split that many will assume that violence is the only available way to seize wealth or power … it is the pervading hopelessness and cynicism of the economically abandoned that may prove to be the most dangerous and ultimately destructive element … support for terrorism has its roots in the desperation of the reviled, the poor, the ignored and those that have no opportunity for a decent life or for influence or power in the existing situation. (1999, p. 39)

It is interesting that an economist like Amartya Sen, talking at the Commonwealth Ministers conference in 2003, homed in on issues such as fundamentalist religious schools and the "narrowing of horizons, especially of children, that illiberal and intolerant education can produce." To define people just in terms of religion-based classification of civilisations can itself contribute to political insecurity (people belonging to "the Muslim world" or "the Western world" or "the Hindu world" etc.) He (and I) believe the UK government made a mistake in expanding rather than reducing faith-based state schools, "especially when the new religious schools leave children very little opportunity to cultivate reasoned choice and decide how the various components of their identities … should receive attention." In the schooling of children, we have to make sure that we do not have smallness (not greatness) thrust upon the young.

A major concern in post-conflict societies is not to reproduce the education structure that may have contributed to the conflict in the first place (Davies, 2004). We do have a lot to learn from some cases of humanitarian education post-conflict, as it is based on principles of building confidence, giving skills, building collaboration, providing dialogue and en-

counters, and rebuilding political and public cultures. It is not about testing.

How does the globalisation of culture fit into this? It has been argued that McDonalds did play a role in apartheid South Africa, where they provided the only place where different races could share public space on an equal basis. Yet the sponsorship issue paints a different picture. After a few years of Pepsi-sponsored papal visits, or Nike after-school basketball programmes, everything from small community events to large religious gatherings are believed to "need a sponsor" to get off the ground. "We become collectively convinced not that corporations are hitching a ride on our cultural and communal activities, but that creativity and congregation would be impossible without their generosity" (Klein, 2002, p. 35). UNESCO selling out to Daimler-Chrysler in their Mondialogo project is another example. Brand managers are envisioning themselves as sensitive culture makers, and culture makers are adopting the hard-nosed business tactics of brand builders.

So now there is the tension in culture between the ways that globalisation brings more standardisation and cultural homogeneity while also more fragmentation through the rise of locally oriented movements. Barber characterized this dichotomy in the title of his book *Jihad vs McWorld.* Burbules and Torres (2000) argue of a third possibility of cultural homogeneity and cultural heterogeneity appearing simultaneously – the "glocal." But how you research this I don't know. We do now have a pressure towards global citizenship, with exhortations to feel part of the greater collectivity. Yet local community is the real cultural space, rather than virtual ones created by electronic communication and networks of flows of goods and services. Here, identity politics coheres around memories of conflict, failure, domination or nostalgia for a past age.

Citizenship education studies are seeing an increased number of comparative studies. But these tend to compare the curriculum or evaluation processes of various countries (Torney-Purta et al., 1999; Kerr, 2000) and demonstrate how citizenship education is gaining prominence worldwide; but it is difficult to go deep into either the social and political context or into social impact. Torres (1998) argues that one of the problems of citizenship education research is contextualisation, and that in order to grasp the tension inherent in citizenship education between inclusion and exclusion, we need to look at the specific relationship between the state, citizenship as political identity and citizenship education. We need to draw on theories of democracy and multiculturalism, especially in diverse societies. One interesting IIEP study for example demonstrated that a code of conduct for teachers diminishes unethical behaviour. Teachers are the highest target of spending in post-conflict societies, so it is worthwhile to implement a form of social control which is effective, such as a code of conduct (IIEP, 2004).

I would say that two positive aspects of globalisation have been an agreement on human rights and the spread of democracy, however interpreted. There has been a spread of environmental concerns. As Sen has pointed out, no democratic country has ever had a famine. In terms of enabling schools to counter negative conflict, my book develops the idea of "interruptive democracy," which uses the ideas of dialogue, encounter and challenge in order to promote positive conflict in educational institutions.

Education and Social Justice

In my third area for exploration, we are talking about two sorts of inequality: between countries and within countries. Jared Diamond (1998) argues for history as a science (his book is about why some nations or regions have the "cargo"; and why some groupings formed political systems while others remained in bands or tribes). He has interesting hypotheses which bring together ecological or geographical determinism with historical accidents and individuals – hence the resonances with complexity theory. There are historical "wild cards" or "frozen accidents" – the QWERTY keyboard, or the 24 hour clock and the 60 minute hour based on the Sumerian counting system of 12 rather than the Meso American 20. Why did complex Andean civilisations not develop writing? How did the abundance of homophones in Chinese language, and therefore the need for thousands of signs in traditional Chinese, influence literacy? Was there anything in India's environment predisposing to rigid socio-economic castes, with grave consequences for the development of technology? Why was a proselytising religion (Christianity and Islam) a driving force for colonization and conquest among Europeans and West Asians but not among Chinese?

We do know that the world is becoming more unequal. The top 20% is a more exclusive First World Club in 1999 than it had been in 1965. Income differentials are widening, according to UNDP. In 1913, individuals in rich countries earned 11 times those in poor countries. In 1960 this was 30 to 1, in 1997, 60 to 1 and in 1997 it was 71 to 1. Immense wealth is being created, accompanied by an increasing share of workers without contracts. Nike opposed the work of the Worker Rights Consortium, cutting funds to the universities which supported this.

> On the whole, TNCs aim at making the world less risky and expensive for commercial investment rather than seeking democratic or humanitarian objectives. As a whole, TNCs have been gaining so many rights before the state that they are becoming the new citizens of the 21st century (Stromquist, 2002, p. 99)

There are “manic renditions of globalisation” (Klein, 2002) but “we in the west have been catching glimpses of another kind of global village, where the economic divide is widening and cultural choices narrowing.” MNCs, far from leveling the playing field with jobs and technology for all, are in the process of mining the planet’s poorest black country for unimaginable profits.

> This is the village where Bill Gates lives, amassing a fortune of $55 billion while a third of his workforce is classified as temporary workers, and where competitors are either incorporated into the Microsoft monolith or made obsolete by the latest feat in software bundling….On the outskirts of Manila…I met a 17 year old girl who assembles CD-ROM drives for IBM. I told her I was impressed that someone so young could do such high-tech work. “We make computers,” she told me, “but we don’t know how to operate computers.” Ours, it would seem, is not such a small place after all. (Klein, 2002, p. xvii)

MNCs and global companies are of course claiming that they are great equalizers, promoters of diversity in images or race ; and that they brought down the Berlin wall single-handed. Murdoch told the world that satellite broadcasting made it possible for information-hungry residents of many closed societies to bypass state-controlled television. Crossley and Watson (2003) point out that often under government auspices, the wealthy classes and TNCs are seeking to expand private schooling in the belief that this will open up opportunities at a global or international level. The curriculum emphasises international languages, computer skills, information sciences, mathematics, analytical skills etc. Yet this all leads to greater divisiveness.

If we now look *within* countries, Crossley and Watson argue that the signing of the UN Declaration of Human Rights in 1948 which identified education as a basic human right has had a “profound influence on the shape of educational development throughout the world,” and can be seen to have influenced many of the newly independent countries’ constitutions and plans. I am less sure. How much is lip-service, and how much acknowledgement of human capital theory’s promise of economic growth and modernisation?

Diamond (1998) for example asks, why do people support kleptocrats? (leaders who keep most of the “tribute” for self-enrichment). He cites a mix of four devices that kleptocrats use:

a) disarm the populace and arm the elite.
b) make the masses happy by redistributing taxes/tribute;

c) promote happiness by maintaining public order and curbing violence
d) construct an ideology or religion justifying kleptocracy.

Bands and tribes did have supernatural beliefs, but these did not necessarily justify centralised authority or transfer of wealth or maintain peace between unrelated individuals. When supernatural beliefs gained these functions and became institutionalised, they were transformed into what we call a religion. Chiefs would assert divinity, or a line to God, claiming to intercede; or would support a separate group of kleptocrats (priests) whose function is to provide ideological support for the chief. Hence the collecting of tributes for the construction of temples, the centres of official religion. Religion solves the problem of how unrelated individuals are to live together without killing each other – by providing them with a bond not based on kinship. It gives people a motive for sacrificing lives on behalf of others. At the cost of a few society members who die in battle as soldiers, the whole society becomes much more effective at conquering other societies or resisting attacks.

Has globalisation in terms of markets become the new religion? Or in fact education? Why is there not more resistance to elites? Is this the legitimisation function of education, now an international phenomenon?

Knowledge is perhaps the new religion – and has doubtful effects on equity**.** Concentration on knowledge is depoliticising, drawing attention away from conflict and controversy in economic, political and social terms (Stromquist, 2002). A key feature of "knowledge management systems" (KMS) is to reduce large amounts of text to short summaries. Policy makers apparently have not the time or inclination to read long studies. The APQC and other consulting firms promoting KMS argue that there exist such things as "just-in-time knowledge" and "just enough knowledge." Are information and knowledge conflated? The World Bank calls knowledge gaps "information problems," that is, they are nothing to do with critical or humanistic evaluation. Even social or political conflicts of interest about dams or forestry projects are reinterpreted by the World Bank as "lack of complete knowledge."

In spite of the rhetoric about higher education for all, between 40% and 50% of jobs in the new economy will not require university training, but some type of work-based technical or trade credentials. There is a decrease in critical thinking in universities. Stromquist argues that with the growth of English comes the growth of Anglo-American functionalist modes of thought, framing of problems as technical rather than political. Ironically, universities do become more global in terms of students and marketing interests, but at the same time, their concerns focus on material interests. There is a decline of sociology (especially in teacher education), although I think not in Japan or Europe so much. Stromquist cites

(anecdotal) evidence of the impact of competition among students, indicating that young university students in US tend to be more individualistic and less likely to be concerned with social issues. We see the emergence of the "organization kid" who rarely questions authority and who readily accepts his or her elite position as part of the natural order of life. In UK, we have the insistence on "evidence-based research," concerned with developing and disseminating "good practice," that is focusing on micro-task efficiency and disembedded from wider contexts (Tikly and Crossley, 2001).

The question of knowledge of context is an interesting one. Many (all?) comparative educators argue strongly for contextualised data: Broadfoot (1999) comments on the OECD indicators of provision, process, effectiveness and so on as enormously complex, yet its model is almost entirely detached from culture. We need more than just economic cultures, but cultures of conflict, peace and stability; and more importantly, what these schools are trying to **do** with their process variables. What is the effect of EFA targets, except to drive poor district education officers to falsify their figures in order to gain brownie points, or conversely for governments to play down their figures in order to get more aid?

Higher education is increasingly dependent on business for survival, creating a new business norm in universities (Mok, 2000). In Singapore, serving industry is not enough: "universities must take on the new role of fostering an entrepreneurial climate." Multinationals themselves are establishing private universities, or their own programmes within universities, particularly in instrumental fields – commerce, business or engineering. Which way will comparative and international education go? This is of greater importance with the flow of students. Both altruistic and self-serving reasons will operate. There is a perceived need to foster social justice and sustainable development; yet also the need to become more competitive, so universities must learn what others are doing. Stromquist argues that a desirable direction for comparative and international education is to deal with problems that go beyond the nation-state, such as AIDS, ethnic conflict, gender asymmetries and environmental impact. I would add – or preface – conflict and peace to this list. Williams (2000) notes that the concept of "global security" is being redefined from ensuring safety through military means alone to understanding threats to human well-being from development, environment and violence.

Gender

Gender justice is a significant example or indicator of social justice in general. Here we have a mixed bag of change – there are more opportunities, but a weakening of the welfare responsibilities of the state and a depoliticization of culture. We still need to examine the rhetoric from international agencies about the importance of education for women – for the next generation, the family, the community – that is, not as a human right, only as a sort of multiplier effect. Evidence would in fact seem to show an even stronger human capital investment than for men. So economic and neoliberal perspectives prevail – that the integration of workers of both sexes into the international capitalist economy will eliminate poverty, as poverty is simply under-utilized labour. Poverty has the problem for capitalists of evincing low consumption levels. Over-consumption by others, and offering low wages, is of course not seen as a cause of poverty.

Global magazines are promoting apolitical and sexual identities, "delusory subjectivity" in young women, causing them to think of themselves as already free and equal to men. They do not see the need for political activity. But studies of successful businesswomen in Asia find global modern discourses coexisting with traditional practices, such as deference to males or acceptance of domestic tasks. In certain Asian societies (Singapore, Malaysia, Hong Kong) women constitute the majority of university graduates, so one would expect to find a large number in high positions, yet this is not the case (Luke, 2000).

There are gains in school enrolment (access but not success). The use of quotas is very iffy, and needs much comparative research. Perhaps quotas work best in public office rather than in school or higher education enrolment. But if you still need quotas in work, then how effective is education? There has been a growth of women's studies and gender studies – but for how long?

Ilon (1998, quoted in Crossley and Watson, 2003) claims that globalisation is having a new impact on female enrolments in schools over and above any local cultural constraints. She demonstrates that as TNCs seek cheap labour, the demand for a modestly educated workforce rises. Since female labour is usually cheaper, more compliant and more willing to accept lower wages, the demand for more female education will also rise. Is this a mixed blessing?

Resistance comes from transnational feminist alliances – although there are continued debates about the presentation of Third World women, and of clashes of interests between rich and poor women. One interesting new global economic coalition is the Women's Global Alliance for Development Alternatives, setting an agenda for global economic issues from the perspective of the women's movement.

What is the Resistance to Globalisation and Monopolisation of Minds?

This brings us on to resistance in general – an important study for comparativists. Schools are not only concerned with preparing students as producers, but also as consumers, shaping consumer attitudes and practices, encouraged by the corporate sponsorship of educational institutions and products (Burbules and Torres, 2000).

Writers such as Klein are concerned with the unquestioning acceptance of advertising in schools. Increasing technology means poorer state schools turning to the private sector to finance technology purchases. Channel One in USA and Youth News Network in Canada are the best-known examples of in-school branding. Channel One gives current affairs programmes in exchange for two minutes of advertising a day. Teachers get the A/V equipment but are unable to adjust the volume during the broadcast, so that there is no "audience erosion." There is an in-school computer network, "ZapMe," which monitors students' paths as they surf the Net, providing valuable market research. It sets little research tasks for them, so students are asked to create a new advertising campaign. The Cover Concepts company sells slick ads that wrap around books to 30,000 US schools, where teachers use them instead of plastic as protective jackets. Pepsi brands entire schools: "Pepsi – Official Soft Drink of Cayuga secondary school" is giant sign beside the road.

Klein asks "where is the opposition?" Unlike the furores over sex education or prayer in schools, the move to allow advertising in education did not take the form of one sweeping decision, but rather thousands of little ones. Parents and teachers could not see a problem – they thought kids were bombarded by advertising anyway, and it was more important to get funding. Is there no unbranded space left? China of course is a huge market, with parents and grandparents spending on "the little Emperor." Klein talks ruefully of her feminist days – was this focussing on the wrong thing? On representation, rather than ownership? "We were too busy analysing the pictures being projected on the wall to notice that the wall itself had been sold." (p. 124)

Yet there is evidence of resistance to current market ideology. Proposition 38 in California focused on school vouchers and would have permitted parents to send their children to private or religious schools by granting them vouchers for $4000 a year. This raised US$31 million from supporters but generated $32 million from oppositional forces and did not pass (Stromquist, 2002).

The major adversaries of globalisation in the poor countries have been the peasant movements, particularly in Latin America, parts of Asia, and to a lesser degree, Africa. Most opposition by NGOs has been to defend existing rights and interests threatened by global ruling classes

(Petras, 1999). Klein reckons that as more people discover the brand-name secrets of the global logo web, their outrage will fuel the next big political movement, a vast wave of opposition squarely targeting transnational companies, particularly those with very high name-brand recognition. Campus politics are broadening therefore from race, discrimination etc. to corporate power, labour rights etc. (although she acknowledges this is not the majority of the demographic group). Klein asks what the forces are that push more people to be enraged at MNCs, particularly young people.

September 11th and the attack on US capitalism did make people talk about the global haves and have-nots. But free trade is being rebranded as the war on terrorism. To criticise the US government is to be on the side of the terrorists. A strong public realm is needed, otherwise Osama fills the gaps – the extreme Islamic seminaries in Pakistan that indoctrinated so many Taliban leaders thrive precisely because they fill a huge social welfare gap. The country spends 90% of its budget on military and on debt, but a pittance on education: the madrassas offer not just education but food and shelter. Post September 11, clinging to *laissez faire* free-market solutions, despite overwhelming evidence of their failings, looks a lot like blind faith, and as irrational as any belief system clung to by religious leaders fighting a suicidal jihad.

The rise of popular education movements in protest against globalisation is therefore significant. The 1995 International Forum on Globalisation held the first Global Teach-in in New York, bringing together leading scientists, activists and researchers to examine the impact of the single, unfettered world market on democracy, human rights, labour and the environment. There were seminars on NAFTA, APEC, IMF, World Bank and structural adjustment.. The internet is a decisive weapon here. Protesters managed to get the Multilateral Agreement on Investment taken off the OECD agenda in 1998. An interesting comparative study would be the educational background of those who join resistance and protest movements. The emerging anti-globalisation movement is a diverse set of groups, with different levels of sophistication – unions, intellectuals, anarchists, cyber-activists as well as small farmers and indigenous groups. Lipman (2000) (quoted in Stromquist, 2002) reports resistance against neo-liberal policies at all levels of the educational system in her study of Chicago. NGOs do press for greater support of education; but are not really "oppositional."

> Most resistance is not aimed at changes in the educational arena, despite the enormous consequences that formal education has on a society's ideology and the social stratification being created by globalisation. There is a desperate need for more critical

examination by educators of current developments related to globalisation. (Stromquist 2002, p. 173)

Agenda for Comparative Education Research

From all the above, I suggest a menu of ten priorities for comparative education research in this era of globalisation.

1. Stopping doing achievement studies based on maths achievement and conventional literacy indicators, i.e. the old school effectiveness indicators, and starting doing more comparative studies based on indicators of "achievement" in political literacy, agency, democracy, peace education and human rights education
2. Case studies of where education actually does contribute to a decrease in poverty (Durston argued this for Malawi, but what actually happened was that some of the money went to the community to build the schools, therefore helping the local economy; but it was not the actual education that contributed)
3. A new agenda for what in education contributes to economic and political sustainability *across* nations (including environmental sustainability).
4. Studies of where education has actually contributed to a general health improvement (not just that bought by bigger earnings) and a decline in the spread of HIV/AIDS
5. Studies of the impact of citizenship education or other types of education that have contributed to peace or conflict. (Question one for exam paper: critically evaluate either the American/UK invasion of Iraq *or* World Bank education strategy, *or* both). This might include critical media education and consumer education.
6. The study of resistances to the negative impact of globalisation, markets, advertising, branding in education.
7. The study of resistance to testing and assessment regimes
8. The study of resistances to gendered practices and disparities, and of the impact of alliances

And for comparative education impact itself:

9. The collection of examples about where comparative education research has actually made a difference to policy, how, and for how long.

10. The collection of successful strategies for influence on major agencies and opinion formers – UNESCO, World Bank etc., where they have taken account of comparative education research done outside their remit.

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Genealogical Reflections upon Historical Development of Comparative Education in Hong Kong and Macau

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Abstract

This article briefly outlines the historical development of comparative education in Hong Kong and Macau. By adopting the genealogical approach, the comparative education discourses delivered at Comparative Education Society of Hong Kong Annual Conference 2002 will be deconstructed to depict recent developmental trends of comparative education, and some implications for continuing such an approach will be finally addressed.

Comparative Education Development in Hong Kong and Macau

Both Hong Kong and Macau had their own colonial histories under the sovereignty of United Kingdom and Portugal respectively. Colonial periods in Hong Kong ranged from 1841 to 1997, and Macau lasted from 1557 to 1999 before their return of sovereignty to Mainland China after 1997 and 1999 respectively. Unlike Mainland China and Taiwan, the development of comparative education was not so coherent or institutionalized in that only some universities or other post-secondary colleges in teacher education offered some optional, non-specified or elective undergraduate or postgraduate courses, without any participation of other non-academic persons before the last two decades in Hong Kong. The Comparative Education Society of Hong Kong (CESHK) was established by educators at the Chinese University of Hong Kong (CUHK) in 1989. Afterwards, its executive committee members have been lecturers and professors at tertiary level and membership has quickly extended to other social circles of school practitioners and educational policy-makers in Hong Kong, Macau and educators or educational researchers in Mainland China.

So far social activities of CESHK have involved school visits in cross-cultural and cross-societal perspectives (like visits to Macau and Shenzhen, a southern city of Mainland China) and academic ones included annual conferences and seminars by inviting scholars in comparative and international education from Mainland China, some Asian, European, and North and South American countries. Recently, the University of Hong Kong set up the Comparative Education Research Centre (CERC) in

1994, promoting more specified studies in comparative and international education in Hong Kong than before. There has been an increasing number of monographs, journal papers, individual- or group-based research projects, seminars and conferences on comparative and international education (co-) organized by CERC or CESHK in collaboration with international educational organizations like the Asian Development Bank. Similarly, the Comparative Education Policy Research Unit (CEPRU), founded in February 1999 at City University of Hong Kong, also played a vital role of comparing educational governance and educational policies with special reference to East Asia and Pacific rim. Over the years, there has been a steady increase in CESHK membership. In comparison, owing to limited human manpower and physical resources constraints, there has been no comparative education society or research centre in Macau so far. Macau educators, policy-makers and school practitioners with keen interests in comparative education have been joining CESHK activities every school year since 1989.

Significance of Genealogical and Prosoprographic Analysis of Comparative Education

Recently, the field of comparative and international education has reached diversities, complexities and uncertainties (Crossley and Jarvis, 2000; Schriewer, 2000), facing challenges of other non-Western comparativists and 'other-orthodox' fields in the 21st century. There has been an urgent call for re-conceptualizing and re-framing educational issues in international and comparative education, rethinking the origins of comparative education and the most important of all, re-establishing the roles or status of comparative education (Arnove, 1999; Watson, 1999). Other non-orthodox (like postmodernist) paradigms have been paid heed since the last decade (Rust, 1991).

Genealogy (dialectical relationships between knowledge, discourses and practices) can be regarded as non-historical approaches to investigate historical dimensions of the present, i.e. histories of institutions and practices in comparative education (Gutting, 1994). When analyzing the concepts of punishment, Foucault (1982, pp. 104-117, 130-133) found many ruptures and discontinuities through temporal changes of the concepts. When applying this Foucaultian notion of genealogy to socio-historical development of comparative education in a society or country, a penetrating discourse analysis of related activities, key stakeholders and their research agendas held by the corresponding academic bodies or institutions is required.

On evaluation, past documentary static reports of comparative education literature failed to realize their biased assumptions or value-laden research paradigms like post-positivism and hermeneutics. Through such

genealogical analysis, possible new research agendas to disclose or deconstruct power-knowledge relationships within and between comparative education societies and research centers in a single society or country can be addressed:

- Deepening cross-cultural and cross-national comparisons of comparative education societies facilitated by high levels of ICT (Information and Communication Technologies) competency among future comparativists (Wilson, 2003)
- Discovering temporal variations in conceptions of comparative and international education and their interrelationships (Wilson, 1994) among educators, school practitioners and research students (Paulston, 1999)
- Uncovering hidden value agendas and underlying assumptions in the research outputs of research centers, textbooks and tertiary courses on comparative education and external forces shaping the memberships and activities of comparative education societies (Kwok, 2002)
- Mapping non-Euro-or non-Anglo-Saxon-centric origins and historical development of comparative education discourses (Gui and Bray, 2001; Kwok, 2002)

Deconstructing Discourses at the CESHK Annual Conference

By adopting such genealogical approach, dialectical relationships between the stakeholders, research centres or academic units and their research agendas can be deconstructed to inform the readers of recent historical development of comparative education in Hong Kong and Macau. There were totally 26 presenters (excluding keynote addresses) at the CESHK Annual Conference 2002, hosted by the Comparative Education Policy Research Unit, Dept. of Public and Social Administration in the City University of Hong Kong in February, 2002. Levels of their comparisons covered in various geographical domains of intra-society/intra-society, single-society/single-country, bi-society/bi-country, regional or cross-regional (involving more than 2 societies or countries) and global, international/multi-level studies [See table 1]. Thematic studies (based on presentation sessions) were widely classified in various fields of civic education, local educational studies in Hong Kong, curriculum studies, economics and financing of education, higher education, teacher education, social and policy studies in education and other miscellaneous issues in comparative and international education [See table 2].

Table 1. Geographical Domains of Comparisons

Levels of geographical domains (no. of sessions)	Geographical locations (presenter surnames being mentioned)
Intra-society, intra-country studies (6)	• Beijing and Hong Kong (Wu and Wu) • International Schools, Hong Kong (Shum; Yamoto) • Kerala, India (Mukundan) • Western Rural areas of Mainland China (Xiao) • Yunnan Province, Mainland China (Du)
Single society, single country studies (10)	• Hong Kong (Lo; Shive, Hui, McLaughlin; Postiglione and Yung; Yung) • Japan (Cave) • Macau (Hui, Butler, Mang, Fung, Kwan and Bray) • Mainland China (Cheung; Ip; Lu and Xiao) • USSR (Yan)
Bi-society, bi-country studies (3)	• Hong Kong and Mainland China (Fairbrother) • Hong Kong and Macau (Kam; Koo)
Regional or Cross-regional [involving more than 2 societies or countries] studies (6)	• Asia (Kwok; Mok and Lee) • Hong Kong, Mainland China and Taiwan (Kwok) • Hong Kong, US and Australia (Kennedy, Lee and Hahn) • Latin America (Post)
Global, international, multi-level studies (1)	• WCCES (Bray and Adamson)

The language used for presentation was mostly English with some Cantonese and Putonghua [See table 3]. Embracing three levels of geographical comparisons, investigation areas, and language media for presentation, such preliminary genealogical analysis depicts certain degrees of depth and breadth of current comparativists who were located in or traveled to Hong Kong for the conference. Most presenters endeavored to make single-society or single-country comparisons and the second heated comparisons involved intra-society/inter-society and regional/cross-regional domains. Lack of comparative lens focused on bi-society/bi-country and global, international levels. Investigation areas mostly covered local studies in Hong Kong and some on higher education and economics and financing of education whilst some new issues concerning comparative education societies and agri-technological studies in

Table 2. Areas of Comparative Education Studies

Types (no. of sessions)	Presentation topics (presenter surnames)
Civic Education (2)	• Civic and Environmental Education (Wu and Wu) • Students' civic understanding and attitudes (Kennedy, Lee and Hahn)
Local educational studies in Hong Kong (7)	• Asian cram schools (Kwok) • Bi-sessional and whole-day schooling (Kam) • Ethnic theories and 'Minzu' in modern China (Cheung) • Impacts of political socialization and critical thinking on university students' attitudes towards nationalism (Fairbrother) • International Schools (Yamoto) • NET Scheme in Hong Kong Schools (Shum) • Schooling children's works, schooling and welfare (Post)
Curriculum Studies (1)	• Science teaching (Kraipeerpun)
Economics and Financing of Education (3)	• Human Capital Development (Lu and Xiao) • Resource Financing of Rural Education in Mainland China (Du) • Financing of Higher Education in Hong Kong (Yung)
Higher Education (4)	• Community College in Hong Kong (Shive, Hui, McLaughlin, Postiglione and Yung) • Higher education development trends (Yung) • Research, educational planning and strategic development of higher education in Macau (Hui, Butler, Mang, Fung, Kwan, Bray) • University Governance in East Asia (Mok and Lee)
Teacher Education (3)	• Exchange of student teacher program (Koo) • Ideology and teacher education (Yan) • Teachers' reflective thinking in portfolios (Lo)
Social and Policy Studies in Education (3)	• Deliberate Democracy (Mukundan) • Educational Policy (Cave) • Secondary school politics and curriculum in Mainland China (Ip)
New specified issues (3)	• Cross-society comparative educational development (Kwok) • Agri-technology in popularizing education (Xiao) • WCCES (Bray and Adamson)

education were evolved. As an international language, English was used by the majority of conference presenters to construct their academic discourses whilst the minority tended to use local dialects such as Cantonese and Putonghua, revealing Hong Kong's indigenous cultures (especially after its post-colonial transition in 1997).

Table 3. Language Media

Language Medium (no. of sessions)	Presenter surnames
Cantonese (2)	Koo; Wu and Wu
Putonghua (4)	Cheung; Du; Lu and Xiao; Xiao
English (20)	Bray and Adamson; Cave; Hui, Butler, Pang, Kwan and Bray; Ip; Kam; Kwok; Kennedy, Lee and Hahn; Kraipeerpun; Lee and Hahn; Lo; Mok and Lee; Mukundan; Post; Shive, Hui, McLaughlin, Postiglione and Yung; Shum; Yamoto; Yan; Yung

Implications and Looking Forward

Facing globalization, it is predictable that comparative education in such an international city as Hong Kong will face bigger challenges. More works should be done in the following aspects for continuing the genealogical approach:

- Cultivating international exchanges of teaching, learning, researching, policy-making and sight-seeing experiences within China, Asia and in Global and International Dimensions
- Enlarging society membership of CESHK by inviting more school practitioners, parents, educational policy-makers and even general public to join CESHK academic activities or organize less academic social activities to cater for their learning interests
- Revitalizing methodologies and theoretical frameworks in comparative and international education
- Enhancing cross-disciplinary collaborations with other academic fields locally and internationally (e.g. joint-forum in depts. of sociology and education, research students' foundation course on the applications of anthropology in education)
- Provision of genealogical data archives for historical records and informatization of related activities (e.g. dissemination of local and international conferences, forums, seminars and symposium, innovative e-forum, e-journals, video-conferences, web-based discussion forum, more informative websites and resourceful weblinks for comparativists or educational researchers) facilitated by information and communication technology
- Publicizing various types of research works in comparative and international education, facilitated by research centre
- Organizing inter- and intra-society higher degree student communities in comparative and international education

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Comparing the Portrayal of World War II in School History Textbooks: Epistemological and Methodological Issues in Comparative Textbook Research

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The comparison of textbook portrayals of World War II is intriguing and complex. Why do textbooks from different countries tell different stories? What information is selected and omitted in textbooks from different countries and why? How does the presentation of particular types of information differ across nations and with what implications? These are important and indeed fascinating questions. More often than not international studies have focused on a particular event or issue or the portrayal of a particular country's role during the war (Foster and Nicholls, 2003). Others focus on the examination of a particular pan-national concept across cultures, such as European identity (Kallis, 1999).

When comparing textbook portrayals from more than one country, researchers need to be especially sensitive. In the face of differences, many of which are culturally relative, critique and its justification becomes especially difficult. While it is essential to establish parity, that which is universal or general across the textbook sample, in order to compare, it is equally important to acknowledge differences. In this short paper I conduct a critical survey of two comparative studies. In particular, I draw attention to the aims and objectives of each study and to the specific methodological and epistemological questions raised.

Aristotle Kallis' (1999) much cited comparative analysis of history education in different European countries, *Coping With the Uncomfortable Past: A comparative analysis of the teaching of World War Two and the role of historical education in the construction of a "European" identity*, is not a textbook study *per se*, focusing rather on history education in general. This being said, textbooks and the messages they portray make up an important part of the analysis.

Comparing Britain, Greece, Germany and Italy, Kallis refers to the experience of World War Two in order to demonstrate that history is still taught and understood from national perspectives at odds with the concept of modern European civic identity. Central to Kallis' thesis is the idea that World War Two continues to have a "strong emotive link to collective memory" and is "recent and powerful enough to provoke instinctive defensive reactions."(p. 282) Early in the study Kallis argues that in spite of the presence of an increased variety of perspectives in school history textbooks, "core national values" continue to be expressed (p. 284). In Italian textbooks, for example, Kallis discovers that the role of the re-

sistance movement is given extra-coverage while the nation's fascist aspirations are downplayed. Likewise, the image of the British population standing alone against the German Luftwaffe is found to be a common theme across British texts while the endurance of the German population in the face of severe allied bombing raids is stressed in textbooks from Germany (p. 285). For Kallis, the raising of standards in history education across Europe has been hindered due to the "the legacy of ethnocentricity,"(p. 284), the teaching of World War II characterised too often by representations of *the nation redeemed*, extolled at the expense of *the other*. Kallis concludes with a series of recommendations. These include the need for more horizontally oriented, pluralistic perspectives, the need to teach non-European developments in history education and the need to place greater emphasis on social and local history.

Kallis' study is a provocative piece of work. However, the methodology appears fragile. Kallis comes to some strong conclusions about the content of history textbooks, for example, without discussing the important particularities of his textbook sample. How many textbooks from each country make up the sample? For what age group or examination syllabus are they designed? Are the books in the sample published by major publishers? Are they censored? Must they meet specific curriculum requirements? Even though Kallis appears to ignore these important considerations he never fails to make generalisations about Italian textbooks doing this, and British textbooks do that etc. Is he referring to "all" Italian, Greek, German and British textbooks or a "selection"? By using overly generalising language Kallis ends up supporting the very national stereotyping that he purports to critique. In addition to this, Kallis makes no reference to any form of analytical framework applied to the textbooks in his sample. What questions did he apply and why? How were the questions categorised? By not providing answers to these questions it is very difficult to understand how Kallis arrived at his conclusions.

Then there is the question of epistemology. Kallis certainly locates his analysis in socio-political terms. He is clearly critical of nationalist history and supportive of more Pan-European approaches. To some extent, therefore, the epistemological underpinning of his research is inferred. In other words, that Kallis supports the idea of knowledge as horizontally organised and open to debate appears implicit in his critique of nationalist oriented knowledge, vertically organised and closed to debate. Yet perhaps this would be too generous. Nowhere in the study is there any sense of the relationship between the researcher and the researched. As such, Kallis seems to be located not according to the limits of an explicit epistemology but rather according to his own "common sense" assumptions as an academic historian. It is from this position that he appears to make generalisations about "history education," "history teaching" and "history textbooks" across Europe.

Allen Ketchum's quantitative study *World War II Events as Represented in Secondary School Textbooks of Former Allied and Axis Nations* (1982) was conducted during the cold war and focuses purely on portrayals of the war in Europe. As discussed by the author in a previous paper (Nicholls, 2003), Ketchum uses an array of quantitative techniques and identifies a series of patterns across the textbook sample. Not surprisingly, attention to particular time periods and events was found to differ from textbook to textbook and from country to country. Where US textbooks were found to stress wartime personalities, for example, the UK and Soviet textbooks placed greater emphasis on battles. Meanwhile, in Italian and Polish textbooks civilian resistance was given greater coverage. Ketchum also discovered that while textbooks from Warsaw Pact countries tended to be more thorough and detailed than those from NATO countries they were also more inclined to give little attention to events outside the Eastern Front.

At face value, Ketchum's study is an interesting piece. The methodology used is clearly laid out. Ketchum defines his research aims and objectives precisely, and his use of analytical techniques and procedures is easy to follow. This being said, the sample size is too small. By analysing only one textbook from each country Ketchum is unable to generalise from any of his results. This is disappointing, calling into question the motivation for his conducting the study in the first place. While the analysis of deeper samples of say 3 or 4 textbooks per country would have been more complex, the yield from the research findings would have been far richer, possibly providing the basis upon which to make recommendations (Nicholls, 2003).

Ketchum does not discuss epistemological concerns. This is not to say that the work has no epistemological dimension, far from it. In fact, like so much quantitative research the study is underpinned throughout by an implicit and all-pervasive positivism. But nowhere does the author explicitly locate the work in theoretical terms and in relation to other perspectives. Accordingly, Ketchum never considers the relationship between researcher and researched, or the nature of historical knowledge and the implications of a positivist epistemology for understanding knowledge, or the notion that as a researching subject his position may be anything but neutral. Finally, he never questions or defends his choice to use quantitative methods. Quantitative methods within a positivist epistemological framework are simply treated as given. This reduces the entire study to an uncritical sequence of measuring exercises. While Ketchum describes differences across texts, he is unable to comment critically about why there are differences or about the meaning of the differences.

In this short paper I provide a critical survey of two comparative textbook studies. In particular I draw attention to the aims and objectives of each study with special attention to the methodological and epistemologi-

cal questions raised. That World War II will remain as an important and controversial topic in school history education in many countries is unlikely to change for some time. Similarly, it is highly probable that school history textbooks will continue to act as key gatekeepers to official versions of the war, at least for the foreseeable future. However, World War II is multifaceted; its representation in school history textbooks complex and essentially controversial, requiring analysis that is both dynamic and robust. If textbook researchers wish to contribute meaningfully and effectively to debates, therefore, they must be explicit about the methodological tools they use to analyse texts; about the grounds and parameters upon which they arrive at conclusions; and about the basis upon which they feel critique is justified. Solidly defended findings and ideas can be used to challenge, convince, persuade, influence and affect positive change. Ultimately, that means improved school textbooks for the students that use them.

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Schools, Parents and Communities as Partners in Hong Kong and Singapore

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Background of the Research

Government advocacy of parent-school-community partnerships is becoming a global phenomenon. In Asia, many education ministries have formed special advisory bodies to advocate and develop home-school co-operation. This movement is spearheaded by the Committee on Home-School Co-operation (CHSC) in Hong Kong and the COMPASS Council (Community and Parents in Support of Schools) in Singapore.

My research explores the evolution of parental and community partnership in these two states, and the local and global forces which shaped them. It focuses on the work of CHSC and COMPASS, examines the "what, why and how" of partnership advocacy, and how foreign practices of partnership have influenced their local movements. Seventeen key policy actors and six local academics in the two states were interviewed to gain insiders' perspectives on the "micro-politics" of educational partnership.

Hong Kong and Singapore: Contexts

Hong Kong and Singapore are chosen as a pair for comparison because they, like a pair of *fraternal twins*, "have sufficient in common to make analysis of their differences meaningful" (Bray, 2004, p.248). Moreover, both states began advocating home-school co-operation in the 1990s, aspects of which can be traced to models of partnership elsewhere. A major difference between Hong Kong and Singapore is their racial composition: Hong Kong has a homogeneous Chinese ethnic population, while Singapore is multiracial (77% Chinese, 14% Malays, 8% Indians, and 1% others). Educational provision also differs, wherein the ratio of government to aided schools is 6:79 in Hong Kong, while it is 73:19 in Singapore.

Analytical Framework

Policy cloning is a common source for educational innovations in Hong Kong and Singapore. Their advocacy of parent-school-community partnership is an example. This research posits that "a dialectic [is] at work by which these global processes interact with national and local

actors and contexts to be modified and, in some cases, transformed. There is a process of give and take, an exchange by which international trends are reshaped to local ends" (Arnove, 2003, p.3).

A combination of Fägerlind and Saha's (1989) dialectical framework - a modified version of which is shown in Figure 1 - and the comparative method of Bereday (1964) is used. The partnership models in Hong Kong and Singapore are similar to foreign models in the global market. It is argued that the local context acts as a filter in policy transplantation.

Main Findings

The research examined three domains of partnership advocacy in Hong Kong and Singapore: (1) contexts and rationales of advocacy; (2) content and channels of advocacy (3) contextualisation of foreign practices of partnership. The results from the separate "country studies" are juxtaposed in Table 1.

Contexts and Rationales for Partnership Advocacy

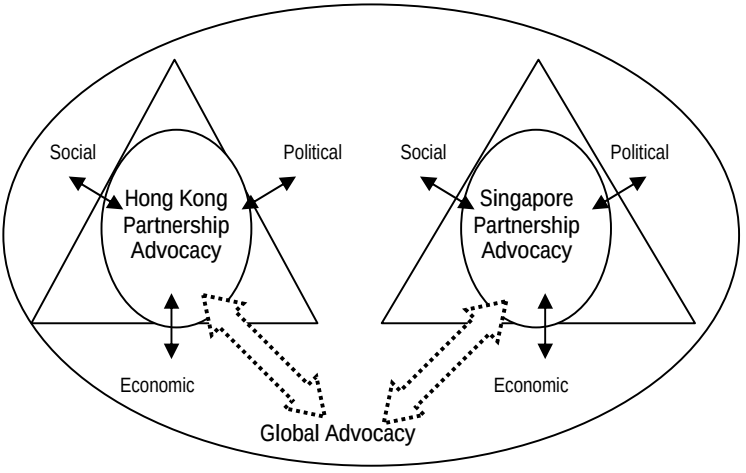
Partnership advocacy in Hong Kong and Singapore evolved within a context characterised by: (a) a strong state; (b) a financially-able government that invested highly in education; (c) a competitive, highly-pressurised educational environment; (d) a societal culture that did not have a tradition of parent-school collaboration, but where parents gave intensive attention to children's education in their homes; and (e) a relatively democratic society. In this context, the driving force for partnership differed from the rhetoric in some industrialised Western countries as well as less-developed Asian countries.

Rationales for partnership in both Hong Kong and Singapore evolved *from within* the needs of the local state. Some societal problems appeared to have triggered the movement in Hong Kong, although it subsequently became clearer that home-school co-operation was integrated with the School-Based Management reform. Parental participation in schools was promoted as a mechanism to ensure school accountability. Singapore, in contrast, viewed partnership as a means not so much to ensure accountability as to achieve the desired outcomes of education in school, in the community, in the industry, and in the state.

Content and Channels of Parent-School-Community Partnership

The form of educational partnership promoted by the CHSC in Hong Kong was primarily home-and-school co-operation. The membership structure of CHSC, composed of parents and school representatives, mirrored this mission. The Education and Manpower Bureau (EMB) had a

Figure 1: Analytical Framework:
The Dialectic of the Global and the Local in Parental and Community Partnership in Education



Source: Adapted from Fägerlind and Saha (1989, p.227).

low profile in the Committee. In contrast, Singapore's version of educational partnership targeted *parents, schools and communities*. The Ministry of Education (MOE) took the lead role in COMPASS, having a senior MOE official as its Chairperson. Yet, it ensured a broad and balanced spectrum of COMPASS members from business and school sectors, grassroots organisations, Parliament, and the media. The multiracial equilibrium was consistently observed in this set-up.

The different approach to partnership between the two states is partly attributable to the underlying *structure of educational provision* in their systems. Education in Hong Kong had since 1978 largely been in the hands of various community and church groups who managed the aided schools. Singapore education, in contrast, was mainly in the hands of the MOE, since that was a *conditio sine qua non* for socio-economic stability. Thus, the MOE sought to reach out to the community, whose multiracial features further added diversity and colour to partnership advocacy. This highlights that educational partnership is embedded in the local education system, which is in turn couched within the wider eco-system of the state.

Table 1
Hong Kong and Singapore Partnership Advocacy Compared

Parameters of Comparison	**Hong Kong**	**Singapore**
Year Advocacy started	1993	1998
Context	In 1993: Preparing for 1997 political transition; more participatory government Strong economy Some social problems Piece meal educational reforms; radical reforms not until 1998	In 1998: Increasingly participatory government Economic recovery No major social problems Comprehensive review of education
Content and Channels for Advocacy	Home-School Co-operation mainly through the PTA. 1993-1996: Different levels of involvement especially the PTA. Low profile advocacy; EMB was not actively involved. 1997-2002: Push formation of PTA; Top-down, high profile amidst radical education reforms and SBM policy; closer affiliation with EMB head.	Parent-School-Community Collaboration. 1998-2002: Different forms of involvement, foster PSGs and community-wide support; Top-down, high profile; Senior MOE officials are hands-on.
Rationale for Advocacy	School accountability as a main reason, though not exclusively.	Enrich the learning environment and outcomes.
Achievements	10 years (1993-2003) PTAs and PTA Federations almost universally implemented.	5 years (1998-2003) Growth in PSGs and cluster networking.

Notes:
"SBM" – School-Based Management
"PTA" – Parent-Teacher Association
"EMB" – Education and Manpower Bureau
"PSG" – Parent Support Group
"MOE" – Ministry of Education

Contextualisation of Foreign Partnership Models

Both Hong Kong and Singapore had looked at foreign models of educational partnership. This domain explores how their local movements interacted with global elements resulting in a local alloy of educational partnership. Two dimensions are noted in this dialectical process: first, an

active dimension, referring to a conscious selection of foreign practices to be advocated at home; second, *a passive dimension* which is a more or less sub-conscious "filtering" by the host country of foreign policy elements.

Singapore's COMPASS is illustrative of the *active* dimension. COMPASS used the Epstein framework (Epstein et al., 1997) for its advocacy, but carefully assessed its local application. This was a consensus among the COMPASS members interviewed. Hong Kong also learned from foreign models (e.g. Japan, the UK and Australia) and adopted some piece-meal practices, but was less culture-sensitive.

The *passive dimension* of the dialectic between the global and the local is elucidated by the Hong Kong partnership movement. A majority of the key informants were surprised and puzzled when asked why community participation was not in the CHSC's mandate. Further probing attributed it to the fact that the community "was already there," being the largest provider of education through the aided schools. Also, the Hong Kong government traditionally adopted a segregated approach to governance. This administrative style was reflected in their partnership advocacy, where home-school co-operation was under the EMB, while working with the community was the task of other government departments. Singapore, in contrast, adopted a strong, centralised approach to governance, and this was reflected in COMPASS' strategy.

The different policy cloning styles adopted by the two states thus acquire meaning in the light of their respective political, socio-economic and educational contexts. As Beattie (1985) observed: "Parent participation in education is very far from a purely educational matter (p.239)…[Its] structures are intimately connected with structures of educational government and administration, and with deep-rooted national attitudes and traditions (p.247)". The research concludes that while global trends of parental and community partnerships exert an influence on local movements, the local state's imperatives play a more decisive role in this dialectical process.

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Two Music Syllabi: A Comparison of Hong Kong and Taiwan

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Introduction

There are three main kinds of curricula in education: the intended, resourced, and implemented curriculum. The intended curriculum entails the official written syllabus of the subject; the resourced curriculum encompasses textbooks and other materials; and the implemented curriculum is the subject materials as taught in the classroom by teachers. Among these three curricula, the intended curriculum is the aspect designed first and can be called the "root of the curriculum." The intended curriculum exerts direct influence, in terms of design and content, on the other two curricula. Therefore, a study of the intended curriculum is a first step to an overall understanding of a particular school subject.

This paper aims to describe the nature and extent of the intended music curriculum in the two Chinese societies, Hong Kong and Taiwan, and comes out of my interest in music education in these two closely related cities with over 90% Chinese populations (Lau 1998, 2004a, b and c). To come to an understanding of Chinese music education, it describes similarities and differences in the two official music syllabi, Hong Kong's Syllabus for Music (Forms I – III) (Curriculum Development Committee, 1983) and Taiwan's Curriculum Standards of Junior High School: Music (Ministry of Education, 1994). In particular it seeks to focus on Chinese and non-Chinese music in the music syllabi, with the idea that Chinese music is an important element of a music syllabus in a Chinese society, because of its firm aesthetic and philosophical principles (Deeble, 1996, p. 109). This comparative music study is worthwhile to better understand both Chinese music education in general and the music syllabi in these two cities, and contributes to the literature of comparative studies of Hong Kong and Taiwan (Lau, 2000; Lo and Tai, 2003; Mok and Koo, 2000), especially in the study of music education (Ho, 2000; Yip, Leung and Lau, 2003).

A Comparison of Music Syllabi in Hong Kong and Taiwan

This section highlights some of the key findings of the comparative analysis of the content of the music syllabi in Hong Kong and Taiwan.

Chinese music, non-Chinese music, and "mixture" music each equally take up one-third of the syllabi.

Much literature has discussed the strong influence of Western music and culture on Hong Kong and Taipei, and particularly the teacher education and training of the two places. Consequently, the design of music textbooks and music teacher teaching in classrooms favour teaching non-Chinese music, mainly Western (Lau, 2003; Lau, 2004a, b and c). However, neither of the two music syllabi has any special bias or emphasis on either Chinese or non-Chinese music. Both the aims and content actually reflect a balanced programme in terms of the extent of Chinese and non-Chinese music elements.

In addition, for one-third of the syllabi content, it is hard to justify whether the materials belong to Chinese music or non-Chinese music. Therefore, in this case, music textbook publishers, designers and music teachers can interpret this content themselves. Moreover, the interpretation of such materials in the syllabi by music textbook publishers and designers is very important because many music teachers like to strictly follow textbooks when they teach (Lau, 2004a).

The syllabi include a lot of Western music practices and training

Nearly all the music "basic training" is in the style of Western practice. For example, singing (the vocal production using Italian Bel Canto) and signatures and signs in music and score reading (time signatures, key signatures, rhythm notations, scales, etc.) are all in the Western tradition. Western music has developed for a long time, and Western music education is popular around the world. It can be concluded that Western music has influenced music education and music syllabi designers in Hong Kong and Taiwan.

There is no indication to teachers for a preference for either Chinese or non-Chinese songs

In the section of the syllabi on singing, there is no specific indication to music teachers whether they should choose Chinese or non-Chinese songs, except where the Ministry of Education (1994) indicates clearly that a few Taiwanese songs should be taught. The two syllabi only indicate the genres of songs, for example, unison song, two-part song, folk song, and others, and suggest appropriate timing to teach these songs. Therefore, song selection is left to music teachers, music textbook designers, and publishers, who have the freedom to decide the nature and extent of these songs beyond what little is suggested by the music syllabi.

Music publishers and teachers have more flexibility in selecting the nature and extent of Chinese and non-Chinese music. For example, recent Hong Kong music textbooks have included more Chinese songs (especially Canto-pop) after 1997. Some low-band schools choose many local Canto-pop songs to sing in their lessons while some high-band schools rather opt for some non-Chinese artistic songs. As for Taiwan, it is found that most of the unison or 2-part songs in the music textbooks are local music composed by local composers for promoting local culture.

Little non-Chinese music, other than Western music, is included in the syllabi

In the section on music appreciation, the number and proportion of Chinese and non-Chinese repertories are found to be quite balanced (nearly the same) both in the Hong Kong and the Taipei syllabi. Although there is a balance of Chinese and non-Chinese (mainly Western) repertories in the syllabi, there is little discussion of Asian, African, or non-European music. The most famous examples of non-Chinese music introduced in the syllabi are some popular Russian repertories such as those composed by Tchaikovsky, Mussorgsky and Rimsky-Korsakov.

Music syllabi promote local music

The Taiwan government is eager to promote her local culture, and local songs and repertories from Hakka, Minnan and indigenous music are introduced in the syllabi. Moreover, it is compulsory to teach a few aboriginal songs. Some teachers are strongly opposed to this suggestion by the syllabus and instead just follow their own music syllabus because they dislike and are unfamiliar with indigenous music. On the other side, the Hong Kong music syllabus has not clearly listed the genre of local music. After 1997, Hong Kong people have a stronger sense of belonging (to Hong Kong or the Mainland). Music publishers, too, include more local Canto-pop songs and appreciation of Guangdong opera in music textbooks. Now, music textbook publishers interpret local Canto-pop songs as a type of Chinese songs when in fact this has been suggested by the music syllabus for a long time. Also, due to the active promotion of Guangdong opera by the Curriculum Development Institute, music textbook publishers emphasize Guangdong music in the syllabus and include a larger proportion of Guangdong opera in their textbooks (Curriculum Development Institute, 1998).

Conclusion

From the above discussion of the two music syllabi, the following points can be concluded. First, the basic training introduced in the music syllabi is mainly based on Western practices, for example, Italian Bel Canto vocal production, and uses Western musical notation (rhythm, key signatures, time signatures). There is little introduction to non-European music training and practice. It is clear that Western music in terms of basic training has made an impact on the music syllabi designers.

Second, the music syllabi give great flexibility to music textbook designers, publishers, and teachers to choose the nature and extent of Chinese and non-Chinese music in their textbooks or in their actual teaching. Music teacher can create their own unique music curriculum according to the same music syllabus, due to the ambiguity of the syllabi. It is likely that syllabi designers do not want to strictly control the design of music textbooks and the teaching of music teachers, so they devise more open music syllabi to allow textbook designers and teachers to select what they like according to their abilities, strengths and limitations; the social and political environment; and the school environment. For example, Hong Kong's Curriculum Development Institute has recently been promoting Guangdong opera, so textbook content in this area has increased. The Taiwan music syllabus also affects textbook designers and teachers, with an example being that local music is highly promoted in the syllabus. Music textbook designers and publishers are also free to choose the nature of Chinese or non-Chinese music in textbooks. Their choice has a great influence on music teachers, for many music teachers both in Hong Kong and Taiwan strictly follow and rely on textbooks instead of following the syllabi.

Third, in the section on music appreciation, the syllabi show a balance of Chinese and non-Chinese music content. The extent of Chinese and non-Chinese music are nearly the same. Despite this, both Hong Kong and Taiwan music teachers tend to teach Western music. It is interesting to find an imbalanced implemented curriculum (music teaching) coming from a balanced intended curriculum (official music syllabi). This is because music teachers in both places have more confidence and interest in teaching Western music than in teaching Chinese music, because their basic music education, teacher training, and social-political environment have been mostly influenced by Western culture.

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中國長興縣的學券專案[1]

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摘要

本文著眼於中國長興縣的學券(school voucher)專案。該專案於 2001 年發端，旨在幫助民辦學校及職業技術學校，稍後該專案擴大其涵蓋面，資助貧困學生。國外的學券政策多爲意在向學生提供更多的擇校權，以及提升學校之間的競爭；比較之下，中國長興的學券政策則傾向於以公共資金扶助弱勢學校——民辦學校和職業學校。此舉的目的是以學券作爲一種信號，吸引家長選擇這兩種學校，以及私人對這些學校的投資。人們可以通過長興的學券透視中國教育界目前的三個主要潮流，即：教育市場化、民辦教育與職業技術教育的發展與困難、教育分權(education decentralization)。

近年來教育選擇已經成爲教育改革中的主流。在各種教育選擇的形式中，學券是備受爭議的一項。在先行者智利實施學券二十年之後，中國也在 2001 年開始了這一嘗試。在集體主義色彩依然鮮明、市場經濟多年被抑制的這一土地上，學券的實行無疑具有特殊的意義。它折射出中國教育改革中的幾個重要問題。這些問題一方面與國外的經驗遙遙呼應，一方面也揭示了中國的特殊環境。由於長興縣的學券計劃是爲解決民辦教育和職業教育的困難而“量身定做”的，本文將著重報告中國長興的學券計劃方面的成效。同時，本文還將分析長興教育券專案的廣闊背景以及它折射出的若干個教育議題。

長興的學券專案

中國的學券專案並不像人們所想象的那樣肇始於北京、上海之類的大城市，而是從一個名不見經傳的小縣城——長興縣發源的。長興縣位於浙江省湖州市內，面積 1427 平方公里，人口 62 萬。長興縣的經濟實力較強，是全省“小康縣”，全國綜合實力“百強縣”，2003 年財政總收入 10.32 億元，農民人均純收入 5622 元。[2]

[1] 本文根據文獻及筆者本人的實地考察而成。因爲篇幅所限，文章略去了“教育輸入”(educational importing)的內容，而以介紹長興縣的專案爲主。
[2] 資料來源：長興縣教育局內部資料

2001 該縣的教育廳廳長熊全龍到美國訪問途中，由於一個女議員在說服她的同僚們在加州實行學券計劃，而聽說了“學券”這一概念。回到中國以後，他和同事們就開始于同年在長興實行學券專案。熊全龍認爲學券是解決長興兩個教育問題的新思路。一個問題是，在長興，願意就讀職業技術高中的人寥寥無幾。2001 年前，在職業高中和在普通高中就讀的人數之比爲 1:1.73，而浙江省對各個縣的要求卻是 1:1。另一個問題是，長興有限的教育資源需要更多的民辦學校來減輕政府的負擔。（“民辦學校”一詞原先指農村中非國家創建，而由鄉鎮或村民自行建立、國家補助的學校；現在此詞專指私人創辦或私人運營的學校，可粗略理解爲私立學校。）然而當地僅有的兩所民辦學校依然薄弱，對學生的吸引力不大。（江，2003；吳，2003b） 既然學券在美國可以用於募集教育資源，那麼它也很可能解決長興的這兩個難題。

長興學券計劃的第一階段從 2001 年夏天開始。總價值 65 萬元的學券發放到 1800 名學生手中。這一階段的目標是改變長興縣民辦教育和職業教育薄弱的現狀，以及民辦學校與公辦學校之間、職業技術學校與普通高中之間不平等的地位。每一個入讀民辦學校的學生都將得到價值 500 元的學券，入讀職業學校的學生將得到 300 元的學券。學校將收集所有的學券並連同學生名冊遞交給教育局。教育局在審計之後把相應的經費撥給校方。2001 年 9 月，總價值 65 萬元的學券分發給了約 1800 名學生（劉，2003；郝，2003）

長興學券專案的第二階段始於 2002 年的夏天，此時當地的教育官員們將學券的功能擴展到扶助弱勢群體，幫助窮困的學生上學。有經濟困難的小學生每學期可獲得 200 元的學券，初中生爲 300 元。到 2002 年 9 月，361 名學生獲得了學券資助。加上進入民辦學校和職業學校就讀的學生，共有 3220 名學生享有學券，總價值達 1560 萬元。（吳，2002a；劉，2003）

學券對於民辦學校和職業學校的效果

兩年之後，接收學券的學校（如清泉武術民辦學校和長興職業技術教育中心）招收的學生數大大超過了從前的數目（見表 2）。除了清泉武校和職教中心的招生數明顯變化之外，長興縣的總體資料也產生了變化。84.6%的初中畢業生選擇了繼續讀高中，而這一資料在 2000 年時僅爲 68.26%。 隨著這些變化，職業技術學生于普通高中生的數量之比達到了 1:1，職業技術學校的學生就業率在 2001 年至 2003 年分別爲 95.5%，95.8%和 96.4%。[3]

[3] 資料來源：個人訪談

表 2: 近三年學券專案的效果[4]

	清泉武術學校：每年新生數	長興職業技術教育中心：每年新生數
2000	約 45 人[5]	（資料缺）
2001	200 餘人	約 600 人
2003	1600 餘人	1500 餘人
備註	招收的學生數量大漲促使學校進一步擴招，改爲春秋兩季招生。	學校擴招後學生人數猛增，校方委託另一所中學代管一部分學生的食宿，以減輕負擔。

長興縣改革的另一結果則是學券吸引來了外部資金。由於學券作爲一種信號，在表明長興政府振興當地教育以及扶植民辦教育的決心上起到了作用，縣外的企業開始認爲在長興的投資有利可圖。2001 年長興縣得到 4500 萬外部資金用於建造一所新的中學：華盛虹溪學校。這所中學頗爲新穎，因爲它是一所股份制學校，由縣教育局出資 500 萬元以及 112 畝土地與浙江華盛建設有限公司聯合建設。在 2003 年，浙江花海國際有限公司投資 1.3 億元新建了大雲昆中學校；另一個公司則開始建造長興金陵高級中學。（周，2002；江，2003，楊，2003）

長興教育券折射出的中國教育現狀中的幾個問題

教育券在中國的生長反映出市場化改革進入到教育領域後出現的種種狀況。而長興的教育券專案則集中反映出三個問題：教育市場化、民辦教育的發展與困難、和教育分權(education decentralization)。

國務院於 1993 年頒佈的《中國教育改革和發展綱要》可視爲中國教育改革的里程碑。它對義務教育、高中教育、高等教育、職業教育、成人教育、教育管理體制、課程改革等都做了指導。中國之後的教育發展都是根據這一部綱要開展起來的。也可以說，中國的教育市場化是從這一部綱要之後才開始發展的。儘管歷時不長，教育的市場化已經顯出廣闊空間。而長興的教育券專案正是在這樣的背景下集中各種焦點的一個案例。

教育的許多領域日趨市場化，如大學、中專畢業生分配模式的改變，由原先的國家包分配轉變爲學生自主選擇單位，學校與學生的關係從以往

[4] 這部分資料根據筆者的預調查而得。
[5] 這一欄中僅計數了具有長興縣戶口的學生，而以下欄目中並未區分長興居民或外來人口。

的“爲社會培養人才”關係轉變爲教育服務機構與服務消費者之間的關係；由此而生自 1997 年起全國範圍的大幅度提高大學學費，學費猛增到 3000 元以上（李，2003）；重點中小學以向家長索要或明或暗的借讀費；各種各樣的教育補習培訓機構興起，從課堂溫習、藝術特長教學到各種英語、電腦等級考試補習不一；各大城市均有許多留學仲介機構；等等。在經濟發達、歷來民間經濟力量活躍的浙江省，教育市場化的的色彩尤爲明顯。

教育市場化的另一典型表現則爲民辦學校的興起。由於 1993 年《綱要》鼓勵社會各種力量參與辦學，各種民辦幼稚園、民辦中小學、民辦大學陸續成立，以此滿足各種不同的教育需求。2001 年，全國的民辦幼稚園達 44526 所，民辦小學 4846 所，民辦中學 3764 所，以及 85 所頒佈學位的民辦大學。（國家教育發展研究中心，2003, p9-19）然而民辦教育的發展仍有諸多困難。僅浙江爲例，民辦教育多爲高中及大學，而較少小學或初中。其二，民辦學校多分佈在城市，而不是在對教育資源更有需要的農村地區。其三，民辦學校的管理方式也落後於實際形勢所需。而除了民辦學校本身，外在強大競爭對手也構成對民辦教育的壓力，如正在謀變的公立學校、紛紛湧入的外國教育機構等等。（黃，2002）這些弱勢正是長興縣以教育券扶植民辦教育，以期將來獲得更大發展的原因所在。

由於教育市場要求市場行爲主體具備自主權，對教育的管理權利也由中央逐漸下放到地方各級，對於非政府主辦的教育機構管理則更爲鬆動，即是教育分權(educational decentralization)。根據條例，各級政府對小學及中學具有管理權，而中央僅保留對大學的管理權，特別是頒佈學位的大學。而各級政府也具備了相應靈活的自主管理許可權。如長興縣從美國輸入的學券專案，完全是出於本縣自主自發的意願要求，在寬鬆的政策中實施，既沒有事先報批上級部門，事後也並無受到上級部門的干涉。教育分權並非意味著上下級教育部門之間的鬆散關係，事實是，筆者對長興的考察中所得的資訊是，在長興和浙江其他許多市鎮，縣市級教育幹部始終與上級幹部保持密切聯繫，如下級向上級尋求政策支援，上級向下級提供意見建議等。非科層管理式的關係也完全可以扶助教育改革的良好進行。

結語

長興縣從美國輸入學券專案這一事件中的許多單個因素或可視爲偶然，但這一專案本身所牽涉的衆多因素卻實在地反映了中國自改革開放後，特別是 1993 年《綱要》頒佈後教育改革的方方面面。國外的許多學券專案旨在促進學生的選擇以及促成學校間的競爭，而這顆異國種子在長興

的實踐卻以幫助民辦學校和職業技術學校爲主。這一對比既是基於中國的教育情況，又反映出在這一背景下教育改革的動向。

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上海、重慶企業職工對技能需求的影響因素：三水平分析

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爲了促進人力資源的發展，如何滿足不斷變化的工作間對技能和能力的需求是一個最基本問題，只有對工作間的技能需求有所瞭解，才能有針對性的提高技能和能力。但是，關於人力的需求和發展人們卻知道的很少，尤其在發展中社會（Meier, 1995）。工作間需要什麽樣的一般技能和能力？在經濟快速增長過程中，特殊技能如何有效的獲得？一個最具挑戰的問題是技能獲取的發展過程，但是像教育社會學和人力分析等都往往忽略了這個過程（Lauglo, 1996）。隨著中國經濟的快速增長，經濟結構和工作間都發生了和實質的轉變（Xiao, 1996），但是目前還缺乏針對工作間的變化、以及工作間對技能需求的研究，尤其是從工作人員的角度出發對技能需求的研究。

隨著技術進步和社會變革，技能的內涵都在隨之不斷的擴展。不同的研究從不同的角度對技能進行分類。有的從工作的內容和性質進行劃分；有的從政策的角度進行區別；教育經濟學從技能的特性（即一般技能和特殊技能）進行劃分等等，因而產生了不同的分類標準。此外一些研究針對技術進步過程中對技能的要求進行分析；有些研究者認爲隨著技術的進步，對技能的需求會“降低”，有些人認爲對技能的要求會提高。還有一些研究開始注意到工作組織的變化，及這種組織中各個水平上工人對技能的需求。無論變化如何發生，工人需要掌握的技能已經發生變化，他們掌握的知識和技能的長遠價值也都正在改變（Berryman, 1993）。也有研究對決定技能需求的影響因素進行分析。簡單講，一些研究把技能看做受一個人或者一個工作或任務的影響(Stasz, 1999)。另外一種觀點是，從關注個人轉到相向作用的系統，或者社會背景，超出個人的認知或者行爲過程；認知活動發生的社會背景是影響技能需求的主要部分，不僅僅是周圍的環境。我們假設，技能需求受個人和社會因素的影響，因此，這個研究希望運用多水平分析方法，研究社會因素和個人因素對技能需求的影響。

由於某項工作需要的知識、態度或者能力只有在特定的工作脈絡中才能被理解。本文希望從工作間的工作人員對技能的需求出發，考察身處特定工作脈絡的成人自身對知識、技能、態度/價值觀的需要，以及影響這種需求的因素。本研究通過對上海和重慶企業的調查，分析中國西部和東部兩個經濟快速發展的城市，工人對不同技能重要性的認識，以及技能需求的分類特點，並且運用多水平分析模型，分析個人特徵和企業特徵對技能需求的影響。

本研究的資料以蕭今教授主持的課題“Education and Work：The Efficacy of Schooling in Human Resource Development in Three Regions in

China”中調查的部分資料和在上海的類似調查資料爲基礎。這部分資料的調查於 1998 年進行，主要運用反向追蹤調查法，在兩個城市分層隨機抽樣選取不同所有制、規模的第二、三產業的企業共 115 家企業的工作間中一兩個主要的生產線的全體職工，包括從管理、行政人員、技術人員到操作工人以及營銷人員共 7040 名職工調查，追溯他們的教育和培訓經歷，找出獲得現行工作的每一條主要教育和培訓途徑。問卷針對變化的工作間對技能的要求變化情況，設計了 20 個題目來測量職工對工作技能的認識。

以上五種能力的因數得分爲因變數，個人水平的引數有：（1）年齡；（2）性別；（3）工作前的學歷程度；（4）工作崗位；（5）表示在過去五年中工作人員所在工作部門和環境的變化情況的變數；（6）是否接受過由單位組織的培訓變數。企業水平的引數有：（1）企業所在地；（2）企業所有制類型；（3）企業規模；（4）企業所屬行業；（5）企業用於培訓的費用；（6）企業下崗職工人數。

統計分析結果可以分爲兩部分，首先通過探索性因素分析，根據職工對不同技能的重要性的認識，技能可以分爲五類。第一類是個人工作態度和特點；第二類爲完成崗位工作需要的特殊技術能力；第三類爲與崗位工作有關的一般職業能力；第四類爲解決問題能力；第五類爲交流能力。

其次根據多水平的測量模型，可以分析個人層面因素和企業層面因素對以上五種技能的影響。就個人層面來看，個人的性別、年齡因素對（1）個人工作態度和特點（2）特殊技術能力和（3）交流能力的認識都有影響，即男性對這幾項技能的重要性的認同比女性強，年齡越小認爲這幾項技能越重要。相對於職業高中學歷而言，具有大學學歷的人認爲個人工作態度和特點、解決問題能力和交流能力更重要。熟練工人在全部五個方面的技能上的重要性的認識均低於技術工人，研究人員和管理人員認爲處理問題的能力和交流能力的重要性比技術工人強。當工作間發生過變化後，職工對爲特殊技術能力、一般職業能力、解決問題能力的重要性加強。最爲突出的是，當接受過培訓以後，職工對以上五種技能的重要性的認識都提高了，說明由企業提供的培訓能夠改變人們對技能重要性的態度。從企業層面來看，絕大部分企業層面的變數對職工對技能重要性的認識都沒有影響，上海的企業對特殊技術能力重要性的認識低於重慶企業，但是在交流能力的重要性上高於重慶企業。私人企業在與崗位相關的兩類特殊技術能力和一般職業能力的重要性認識上低於國有企業，股份制企業在交流能力的認識上高於國有企業。

個人層面的變數在五類技能（潛變數）上分別解釋了1.6%、1.2%、1.0%、3.1%、3.1% 的方差變異，企業層面的變數分別解釋了10.3%、12.7%、15.4%、10.8%、26.3%變異。但是，每種技能的總的方差主要由企業內的變化構成。

根據調查和以上分析，在快速變化的中國工作間，工人對技能的需求可以分爲一般性的通識能力或者核心能力，即個人工作態度和特點、解決

問題能力和交流能力，這種能力是通用性的、一般性的和綜合性的，滲透在各種能力之中的、可以潛在的運用於任何工作場所、社會活動或其他情境中；另外一種是與工作崗位相關的職業能力，是從事特定崗位工作所具備的技術性很強的能力和經驗。對能力重要性的認識主要受到個人特徵即年齡、性別、學歷、崗位等因素的影響，另外企業組織、技術和環境的變化也會引起人們對職業能力和解決問題能力的重視。參加過由雇主提供的培訓以後，工作人員對所有技能的重要性的認識都會增加，可以說，培訓可以改變人們對技能的態度，從而增加學習的動機。

這個研究只是一個初步的分析，希望今後在此基礎上繼續深入分析不同的教育培訓途徑即職前正規教育、在職培訓、成人教育等不同形式的學習在以上五種技能形成中的作用，相互之間如何配合來滿足不同的技能需求，最終幫助在職成人提高和更新技能。

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Cultural Minority Students in Hong Kong: Critical Issues and Policy Considerations

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This paper focuses on some of the critical issues that have arisen from a sample of nine schools where interviews were conducted with principals and teachers on new arrival children (NAC). The intent of the paper is to draw attention to some of the significant issues faced by non-indigenous cultural minority students in Hong Kong as a whole, and to address those issues with policy considerations.

Since the colonial days, Hong Kong has progressively developed into an international metropolitan city and a world renowned financial center. However, the fast pace of such development appears incongruent with its backwardness in understanding and dealing with people from a diverse cultural background. Pupils such as new arrivals from Mainland China find themselves frequently discriminated against and marginalized in many ways by schools and society (*S.K.H. New Immigration Integrated Service Center*, 1997; *Standard*, 5 April 2004; *The Other Hong Kong Report*, 1996; *Wong*, 1997). For example, many mainstream schools are reluctant to accept children who do not belong to the Cantonese-speaking group (*Ming Pao*, 29 Mar 2004; Wong, 1997).

Data from the nine sampled schools found NAC varied from 4.4% to over 95%. A third of the schools that operated an open door policy accommodated a higher percentage of NAC than the majority of schools that were highly selective. Thus, schools that took in a wide variety of student backgrounds, such as spoken dialects, academic achievement levels, and behavioral differences, faced greater student challenges. Unless NAC were recognized with additive cultural capital (Bourdieu, 1976), schools tended to reject them. Even if they were considered for admission, it was a common practice for schools to retain or demote them to lower levels, resulting in a large percentage of over-aged NAC in the school population. One government statistical document noted that in P.1 the percentage of over-aged students was 32.7% whereas by P.6 the percentage was as high as 93.1% in the schools in Hong Kong (Education Department, 2002). In this sampled study, it was alarming that students at the age of 18 to 20 were still attending primary schools in which the placement or curriculum could not meet their whole person development. However, this phenomenon did not appear to cause concern for the government or the school leaders.

Teachers found that the earlier cohort of NAC were better than the later cohort in the sense that they had a better learning attitude, while the

later cohort were characterized by a variety of serious problems such as poor learning attitude, using foul language, smoking, gambling, reading pornography, associating with gangs, bullying and terrorizing other children in school, engaging in prostitution, taking drugs, and running away from home. It was not difficult to understand why schools, especially with a high percentage of NAC, were facing such behavioral challenges when there was such a gross mismatch of placement and curriculum and a neglect of pupil's psychological or developmental needs.

The majority of the schools in the sample claimed Confucius' principle of "teaching without categorizing" as their school philosophy. This is a philosophy that believes all pupils can learn; thus, whoever they are – rich or poor, smart or dumb, good or bad – they should not be labeled but taught according to their ability. Some schools emphasized individual effort, will power, diligence, persistence, or teaching children to be productive citizens to serve society, all embedded within Confucian ethics (Lee, 1996). However, a close scrutiny of the data found that nearly all of the schools failed to translate their school philosophy into practice. Schools that were highly selective believed that they had the right to screen out students, such as those with poor academic results, inappropriate behavior, or physical handicap. The gatekeeping power of schools and the preoccupation with good grades among school administrators were clear from many excerpts from the study. A difference-blind principle (Taylor, 1992) was fundamentally applied by the majority of the schools under the notion of "equal treatment to all". Schools evidently failed to see that using the same measurement in assessing NAC for admission or examination might be unjust, for most of these students did not start school on the same footing as their local counterparts due to educational and other socio-cultural and economic factors, thus penalizing the underprivileged and favoring the most privileged in the process. Findings of the study clearly indicated that educators were generally low in cultural sensitivity towards students from diverse cultures.

Several policy implications were highlighted by the study: first, the Government needs to ensure that equity and the basic human rights of cultural minorities be protected and observed, especially equality of access to education, equality of success through the system, equality of educational quality, and equality of life chances (Farrell, 1998). Second, a comprehensive school reform needs to be in place in which the school curriculum, instructional strategies, and social interaction rejects racism and other forms of discrimination, accepts and affirms pluralism (e.g., ethnic, racial, linguistic, religious, economic, and gender), and promotes democratic principles of social justice (Banks, 2001; Nieto, 2002). Third, schools should adopt a flexible grade level system and flexible curriculum and assessment approaches in order to cater for the diversity of the student population. In particular, the examination-driven system in Hong

Kong that makes school administrators so conscious of whom to admit should be simultaneously considered for reorganization or transformation, for the constant pressure of examinations do not only stifle creativity, but the learning motivation in students (Wigfield and Eccles, 2002). Finally, all teacher training institutes should ensure culturally proficient teachers and educational leaders who are able to respond to diversity, with particular emphasis on critical pedagogy, equity, antiracism, and social justice (Banks, 1993; Cochran-Smith, 2003; Jenks, Lee and Kanpol, 2001).

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Measuring Intercultural Sensitivity: Comparative Research at an International School

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Globalization is creating an increasing amount of contact among people of different cultures and countries (Friedman, 2000). Intercultural sensitivity, defined by Milton Bennett as the way people construe cultural difference (Bennett, 1993), might even be considered a prerequisite for effective global citizenship in the 21st century.

Comparative and international education studies operate with the goals of fostering "cross-cultural understanding, scholarship, academic achievement and societal development through the international study of educational ideas, systems, and practices" (CIES, 2004). Mark Bray of the Comparative Education Research Centre of The University of Hong Kong further recommends a broadening of foci for comparative and international education research beyond cross-national studies, noting that "much work is needed to compare schools, classrooms, and individuals in both Hong Kong and China " (Bray, 1999, p. 6). This article provides one example of such research, a study of the intercultural sensitivity and involvement in service programs at an international school in Hong Kong.

International schools often posit intercultural understanding as one of their major goals but only rarely are these goals defined or measured (Westrick, 2002, p. 6). Without the systematic use of reliable measures and processes, schools can provide only anecdotal evidence related to their claims for students' personal development. International schools need to examine specifically whether students become more sensitive to those of other cultures simply by being present in a school with such diversity and whether their curricular and co-curricular programs enhance or detract from the development of intercultural sensitivity.

The Study

The Hong Kong International School, founded in 1967 to serve international and local students desiring an American-style education, states as one of its goals being to develop "global understanding" (HKIS, 2004). To gain insights into levels of "student achievement" in this area, a mixed-method study of secondary students' levels of intercultural sensitivity was undertaken, based on the Developmental Model of Intercultural Sensitivity (DMIS), a theoretical model by Milton Bennett (1993).

The DMIS consists of two major phases, ethnocentrism and ethnorelativism, which are further defined in six stages: denial/defense, re-

versal, minimization, acceptance, adaptation, and encapsulated marginality (Bennett, 1993). Significantly for research and assessment/development purposes, the Intercultural Development Inventory (IDI) has been created to measure individuals' levels of intercultural sensitivity. Psychometric analysis shows that "the IDI is a highly reliable measure which has little or no social desirability bias and also reasonably approximates the developmental model of intercultural sensitivity (Bennett, 1986, 1993) upon which it is based" (Paige et al, 1999).

The DMIS assumes that experiences of difference are necessary for the development of intercultural sensitivity. Experiences alone are not sufficient to develop intercultural sensitivity, however, so Bennett's model also assumes that experiences of difference must be cognitively processed in increasingly sophisticated stages to make meaning of that difference. The study at HKIS thus sets out to describe levels of intercultural sensitivity and examine correlations of levels of intercultural sensitivity and variables related to experiences of difference.

Sample findings

Participants for this study were recruited from the high school student body (N = 733) and the number that chose to participate represented a sufficient response rate (n = 526, 72%). While a full analysis of results is presented elsewhere (Westrick, in press), several examples illustrate the range of significant findings from this study and the usefulness of the IDI in providing insights into these students' levels of intercultural sensitivity:

1. Students have natural opportunities, both formal and informal to come into contact with a range of experiences of difference. Nearly 50% have lived over five years in cultures different from their own, and the number of students who have spent five or more years studying at international schools is over 50%. Nearly two-thirds of the students in the sample have participated in one or more of the school's service programs, which purposely places students into experiences of cultural, socioeconomic, physical, and/or language difference.
2. Students have moved beyond the issues in the DMIS stages of denial/defense, reversal, and acceptance/adaptation. However, they still need to resolve the issues associated with the minimization and encapsulated marginality stages.
3. Students reporting Asian nationalities evidence lower scores in three of the six stages of the DMIS.
4. Girls evidence higher levels of intercultural sensitivity than boys.
5. The number of years living outside one's own culture positively correlates with higher levels of intercultural sensitivity.

6. The number of years attending international schools positively correlates with scores in the denial/defense and encapsulated marginality stages but negatively with the minimization stage.

7. Participation in service programs can influence the development of intercultural sensitivity but does not necessarily do so.

Discussion

The diverse student bodies of international schools are in effect a microcosm of cross-national samples typical of many comparative studies. Bray categorized the research that places "patterns in different societies side by side" as "explicitly comparative work" (Bray, 1999, p. 4); this study illustrates how research at international schools can indeed provide significant insights into issues of intercultural sensitivity.

As a reliable and valid instrument, this study shows that the IDI can provide descriptive and correlative data on levels of intercultural sensitivity, allowing for comparisons of students with different life and school experiences. The IDI can also be used to examine the influence of curricular and co-curricular programs on the development of intercultural sensitivity. If international schools are to move beyond anecdotal evidence of their accountability to claims that they develop global citizens, instruments such as the IDI can be helpful for program evaluation and development.

The IDI as an instrument and the DMIS as a theory provide a framework for teachers to consider their own thinking about other cultures. Having a common understanding of what intercultural sensitivity is, and where they and their students score on the DMIS continuum, could help them sharpen their instructional methods related to helping students with the cognitive tasks of meaning making around cultural difference.

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New Books in Comparative Education

Education and Conflict: Complexity and Chaos
Lynn Davies
London: RoutledgeFalmer (2004)
ISBN: 0-415-304245; 232pp.
US$39.95

Education and Conflict is a critical review of education in an international context. Based on the author's research and experience of education in several areas affected by conflict, the book explores the relationship between schooling and social conflict and looks at conflict internal to schools. It posits a direct link between the ethos of a school and the attitudes of future citizens towards 'others'. The five sections

- define conflict and peace and outline the relevant aspects of complexity theory
- explore the sources of conflict and their relations to schooling in terms of economic disparity, gender/masculinity, pluralism, nationalism and identity
- focus on war education, competition and fear as well as peace education
- examine educational and humanitarian responses to conflict
- highlight conflict resolution within the school and argue for positive conflict and interruptive democracy in the school.

Globalization and Marketization in Education: A Comparative Analysis of Hong Kong and Singapore
Mok Ka-Ho and Jason Tan
Cheltenham, UK: Edward Elgar (2004)
ISBN: 1-84376-380-X; 168pp.
US$75

Globalization has effected tremendous change to the character and functions of education worldwide. This unique book focuses on its impact upon Hong Kong and Singapore, and how these two East Asian Tigers have responded to the strong global tide of marketization in shaping and developing their education policies. The authors discuss the way in which increasingly prominent tides of marketization, privatization, corporatization and decentralization have influenced the governance and management of education in these two Asian economies. They aim to identify and examine the crucial socio-historical, socio-economic and socio-political factors for education reforms initiated in the two societies in recent years.

Globalization and Marketization in Education will draw an interested readership from education policy researchers, policy makers and administrators. Scholars of public policy and Asian development and education studies will also find the book of special interest and value.

Comparative Education: Continuing Traditions, New Challenges, and New Paradigms
Mark Bray, Editor
Dordrecht: Kluwer Academic Publishers (2003)
ISBN: 1-4020-1143-1; 264pp.
Available from Kluwer for €52. Available from Comparative Education Research Centre, The University of Hong Kong for US$25 or HK$200

At the beginning of the new century, the field of comparative education has emerged with new features. Some of these features result from new technologies, while others reflect political transitions and the forces of globalization. The field embraces new insights on cultures, and scholars are exploring diverse units of analysis.

This book presents perspectives on these changes while noting various continuing traditions. Its contributors come from a wide range of countries and contexts, and present their work within a framework set by the 11th congress of the World Council of Comparative Education Societies (WCCES). The book makes a valuable methodological as well as conceptual contribution to the field.

CERC STUDIES IN COMPARATIVE EDUCATION

Education and Society in Hong Kong and Macao: Comparative Perspectives on Continuity and Change [2nd edition]
Mark Bray and Ramsey Koo, Editors
Hong Kong: Comparative Education Research Centre, The University of Hong Kong and Dordrecht: Kluwer Academic Publishers (2004)
ISBN: 962-8093-34-7; 323pp.
US$32 or HK$200

Hong Kong and Macao have much in common. The dominant populations in both territories are Cantonese-speaking Chinese; both are small in area; both are urban societies; both have been colonies of European powers; and both have undergone political transition to reunification with China. Yet in education, for reasons that are analysed in this book, they are very different.

The patterns of similarities and differences in the two territories make a fascinating basis for comparative study. The overarching theme of the book, on continuity and change, is particularly pertinent following the transition of the two societies to the postcolonial era.

This thoroughly-revised and expanded second edition builds on the widely-acclaimed first edition. The work has been recognised as a significant contribution to the broad field of comparative education as well as to study of the specific societies which are its main focus.

Centralization and Decentralization: Educational Reform and Changing Governance in Chinese Societies?

Mok Ka-Ho, Editor

Hong Kong: Comparative Education Research Centre, The University of Hong Kong and Dordrecht: Kluwer Academic Publishers (2003)
ISBN: 962-8093-58-4; 230pp.
US$32 or HK$200

Globalization has brought dramatic changes to the character and functions of education in most countries around the world. However, the impact of globalization on schools and universities is not uniform. One public-policy strategy that has been widely adopted is decentralization; but there is no consensus on whether centralization or decentralization is more effective to improve organization and management in education.

This book is contextualized in the literature on globalization, and examines how policies of decentralization have affected the running of education in Hong Kong, Taiwan, Shanghai, Singapore, Macau and Mainland China. It analyzes the strategies that the governments of the selected societies have adopted in reforming the structure of education system, mobilizing different forces to create more educational opportunities and devising new measures to assure quality in the education sector.

Citizenship Education in Asia and the Pacific: Concepts and Issues

W.O. Lee, David L. Grossman, Kerry J. Kennedy, Gregory P. Fairbrother, Editors

Hong Kong: Comparative Education Research Centre, The University of Hong Kong and Dordrecht: Kluwer Academic Publishers (2004)
ISBN: 962-8093-59-2; 313pp.
US$32 or HK$200

This book is a landmark in citizenship and citizenship education discourse. It combines conceptual debates with case studies on the question whether the notion of Asian Citizenship can be established, and if yes,

what its research agenda would be. The book contains polemic discussion, empirical data analysis, consultancy reflections, and descriptions of citizenship education in Asian and Pacific countries. Its themes include citizenship paradigms, democratization, patriotism, social tolerance, globalization and information society, and colonialism. The volume explores various perspectives on citizenship, including Confucian, Islamic, humanist, global, indigenous, cultural, political, and comparative. The book covers a wide range of countries and regions, including China, Japan, Hong Kong, Korea, Indonesia, Malaysia, Singapore, Solomon Islands, Taiwan and Vanuatu.

Non-Formal Education: Flexible Schooling or Participatory Education?

Alan Rogers
Hong Kong: Comparative Education Research Centre, The University of Hong Kong and Dordrecht: Kluwer Academic Publishers (2004)
ISBN: 962-8093-30-4; 316pp.
US$32 or HK$200

This is the first full study of non-formal education on an international scale since the 1980s. The book describes the emergence of the concept in the context of development and educational reform. It traces the debate about non-formal education from its origins in 1968 to the mid 1980s, and looks at the issues that this debate raised. It then describes a number of programmes in different parts of the world which call themselves 'non-formal', pointing out the wide range of different views about what is and what is not non-formal. Rogers asks whether we should drop the term altogether or try to reconceptualise it in terms of flexible schooling or participatory education.

This is an important new book by a well-established author. It deals with complex issues, but is written in a clear style. It contains an important new analysis of the development paradigms in which the controversies surrounding non-formal education grew up, and which shaped its purpose and impacts. The author's call for a reformulation of the concept will find echoes not only in developing societies, but also in Western circles, where the language of non-formal education is being used increasingly within the context of lifelong learning. The book grew out of the teaching of non-formal education in which Professor Rogers has been engaged for the last 20 years. It is intended for teachers and students in comparative education courses in higher education institutions, and for researchers and others with an interest in the field.

CERC MONOGRAPH SERIES

Reducing the Burden on the Poor: Household Costs of Basic Education in Gansu, China
Mark Bray, Ding Xiaohao, Huang Ping
Hong Kong: Comparative Education Research Centre, The University of Hong Kong and Gansu Basic Education Project (2004)
ISBN: 962-8093-32-0; 67pp.
US$10 or HK$50

The Gansu Basic Education Project (GBEP) was launched in 1999 with the goal of helping one of the poorest parts of China to achieve universal basic education. The project aims particularly to assist minority children and girls, and has had a significant impact.

The reasons why children do not enrol in school, or drop out at an early stage, are many and complex. This study focuses on the costs of schooling to households. These costs can be a heavy burden, and may be a major obstacle to universalisation of basic education. The GBEP has aimed to reduce the costs to poor households in various ways. This study examines the arrangements for financing education at county and school levels. Among other project components, it focuses on the effectiveness of a targeted scholarship scheme for poor children, a reformed system of education budgeting, and a free-lunch programme.

Building Alliances: Schools, Parents and Communities in Hong Kong and Singapore
Maria Manzon
Hong Kong: Comparative Education Research Centre, The University of Hong Kong (2004)
ISBN: 962-8093-36-3; 117pp.
US$16 or HK$100

Governments worldwide are increasingly advocating parental and community partnerships in education. This monograph explores the evolution of parental and community partnerships in Hong Kong and Singapore, and the local and global forces that have shaped those partnerships. It focuses on the work of two government advisory bodies established to spearhead partnership advocacy: the Committee on Home-School Co-operation (CHSC) in Hong Kong, and Community and Parents in Support of Schools (COMPASS) in Singapore. Key policy actors and local academics in the two states were interviewed to gain insiders' perspectives on the 'micro-politics' of educational partnership.

Comparative educators, ministries of education, and educational policy makers will gain from this book a penetrating insight into parent-school-community partnership in a pair of Asian contexts, and may find some good practices and lessons.

OTHER CERC BOOKS

Full Circle: A Life with Hong Kong and China
Ruth Hayhoe
Hong Kong: Comparative Education Research Centre, The University of Hong Kong (2004)
ISBN: 962-8093-31-2; 276pp.
US$32 or HK$200

Full Circle is the story of a life transformed by long exposure to the peoples and cultures of China and East Asia. The stories of many people in Hong Kong, China and Japan are interwoven into this narrative account, as Ruth Hayhoe shares what it was like to live through a series of major transitions – from the Cultural Revolution in 1967, to Hong Kong's return to China in 1997.

Ruth Hayhoe left Toronto as a 21 year-old in 1967 and moved to Hong Kong, where she started her career as a teacher in an Anglo-Chinese secondary school for girls. Intending to stay six months, she spent 11 years in Hong Kong, teaching, studying, assisting a number of veteran China missionaries, and falling in love with Chinese people and Chinese culture.

In 1980 she moved to Shanghai and taught the first two cohorts of university students after the end of the Cultural Revolution. She returned to Canada in 1984, having done a PhD in comparative education at the University of London. Five years later, following the Tiananmen tragedy, she was drawn back to China as Cultural Attaché in the Canadian Embassy. She continues to visit China where she does research and development work.

In 1997, the year Hong Kong was reunited with China, she became Director of The Hong Kong Institute of Education, a newly established tertiary institution for teachers. Her life came full circle, as she again settled into the city where she had begun her teaching career 30 years earlier.

減輕貧困家庭的負擔: 中國甘肅省基礎教育的家庭成本
貝磊, 丁小浩, 黃平
香港: 香港大學, 比較教育研究中心和甘肅基礎教育項目 (2004)
ISBN: 962-8093-33-9; 53pp.

US$10 or HK$50

甘肅基礎教育專案於 1999 年開始實施，目的是幫助中國的一個貧困地區普及基礎教育。該專案尤其致力於幫助少數民族兒童、女童，並且已經產生了顯著的影響。

孩子們不入學或者很早就輟學的原因很多，也很複雜。本研究集中於家庭所支付的教育成本。這些成本可能成爲一項沉重的負擔，並對基礎教育的普及構成一個主要的障礙。甘肅基礎教育專案致力於用多種方法來降低貧困家庭的教育成本。本研究考察了縣和學校層次的教育財政的安排。在其他的專案組成部分中，本研究聚焦于貧困兒童的助學金計畫、初中女生的寄宿補助。