

# TRANSLATING GLOBALIZATION AND DEMOCRATIZATION INTO LOCAL POLICY: EDUCATIONAL REFORM IN HONG KONG AND TAIWAN

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**Abstract** – The past two decades have witnessed three important international trends: an increase in the number of democratic states; economic globalization; and educational reforms in light of the challenges of the new millennium. A great deal of research has addressed educational change in relation to either globalization or democratization, but little has been said about the complex interactions among all three processes. In view of recent educational reforms in Hong Kong and Taiwan, the present contribution examines the local nature of education policy in a globalized age. It challenges those globalization theories which minimize the role of the state and exaggerate the power of globalization over local factors. In particular, it explores how the governments of these two Chinese societies have employed democratization to generate and legitimate reform proposals and have used economic globalization to justify educational reforms. The study concludes by discussing the complex interrelations of these processes, including tensions between global and local concerns in educational reform.

**Zusammenfassung** – UMSETZUNG DER GLOBALISIERUNG UND DEMOKRATISIERUNG IN LOKALPOLITIK: BILDUNGSREFORMEN IN HONGKONG UND TAIWAN – Die letzten zwei Jahrzehnte haben drei bedeutende internationale Trends bestätigt: ein Anwachsen der Zahl demokratischer Staaten, die wirtschaftliche Globalisierung und Bildungsreformen im Lichte der Herausforderungen des neuen Jahrtausends. Viele Forschungsarbeiten haben sich mit dem Wandel der Bildung vor dem Hintergrund von Globalisierung und Demokratisierung befasst, brachten aber nur wenig Erkenntnis über die komplexen Interaktionen zwischen allen drei Prozessen. Angesichts der jüngsten Bildungsreformen in Hongkong und Taiwan untersucht der vorliegende Beitrag das Wesen lokaler Bildungspolitik im Zeitalter der Globalisierung. Er begegnet solchen Globalisierungstheorien, die die Rolle des Staates minimieren und den Einfluss der Globalisierung auf lokale Faktoren übertrieben darstellen. Insbesondere untersucht er, wie die Regierungen dieser zwei chinesischen Gesellschaften einen Demokratisierungsprozess praktiziert haben, um Reformpläne zu entwerfen und zu legitimieren, und wie sie die ökonomische Globalisierung nutzen, um die Bildungsreformen zu rechtfertigen. Die Studie schließt mit einer Diskussion der komplexen Beziehungen zwischen diesen Prozessen, wobei sie die Spannungen zwischen globalen und lokalen Interessen im Rahmen der Bildungsreform nicht unbeachtet lässt.

**Résumé** – GLOBALISATION ET DÉMOCRATISATION EN TRANSFERT DANS LA POLITIQUE LOCALE : RÉFORME ÉDUCATIVE À HONG KONG ET TAIWAN – Les deux dernières décennies ont témoigné de trois importantes tendances internationales : une augmentation du nombre des états démocratiques, une globalisation économique, et des réformes éducatives à la lumière des défis du nouveau millénaire.



Un grand nombre de recherches a abordé le changement éducatif en relation ou bien avec la globalisation ou bien avec la démocratisation, mais on a peu parlé des interactions complexes de ces trois processus. Eu égard aux récentes réformes éducatives à Hong Kong et Taïwan, la contribution présente examine la nature locale de la politique d'éducation dans un âge globalisé. Elle défie ces théories de la globalisation qui minimisent le rôle de l'État et exagèrent le pouvoir de la globalisation sur les facteurs locaux. En particulier, elle examine comment les gouvernements de ces deux sociétés chinoises ont employé la démocratisation pour générer et légitimer des propositions de réformes et ont utilisé la globalisation économique pour justifier des réformes éducatives. L'étude conclue sur la discussion des interrelations complexes de ces processus, incluant les tensions entre les préoccupations globales et locales dans la réforme éducative.

**Resumen** – LA GLOBALIZACIÓN Y LA DEMOCRATIZACIÓN TRASLADADAS A LA POLÍTICA LOCAL: LA REFORMA EDUCATIVA EN HONG KONG Y TAIWÁN – Las últimas dos décadas han presenciado tres importantes tendencias internacionales: un incremento del número de estados democráticos, la globalización de la economía y las reformas educativas a la luz de los retos que presenta el nuevo milenio. Se ha dedicado al cambio educativo un gran número de estudios, relacionados ya sea con la globalización o con la democratización, pero muy poco se ha dicho sobre las complejas interacciones que se producen entre estos tres procesos. En vista de las recientes reformas educativas que tuvieron lugar en Hong Kong y Taiwán, esta contribución examina la naturaleza local de las políticas educativas en una era globalizada, desafiando a aquellas teorías de la globalización que minimizan el papel del estado y exageran el poder que supuestamente ejerce la globalización sobre factores locales. En particular, explora cómo los gobiernos de estas dos sociedades chinas han empleado la democratización para generar y legitimar propuestas de reforma y cómo han usado la globalización de la economía para justificar reformas educativas. El estudio finaliza discutiendo las complejas interrelaciones que se producen entre estos procesos, incluyendo las tensiones entre intereses globales e intereses locales que pueden surgir en una reforma educativa.

**Резюме** – ВНЕДРЕНИЕ ГЛОБАЛИЗАЦИИ И ДЕМОКРАТИЗАЦИИ В МЕСТНУЮ ПОЛИТИКУ: ОБРАЗОВАТЕЛЬНАЯ РЕФОРМА В ГОНКОНГЕ И НА ТАЙВАНЕ – Два последних десятилетия были свидетелями трех важных международных тенденций: увеличения числа демократических государств, экономической глобализации и образовательных реформ в свете вызовов нового тысячелетия. Большое число исследований затронуло образовательные перемены в отношении или глобализации, или демократизации, но мало говорилось о сложных взаимодействиях между этими тремя процессами. В свете недавних образовательных реформ в Гонконге и на Тайване, в данной статье изучается местный характер образовательной политики в эпоху глобализации. Оспариваются те теории глобализации, которые преуменьшают роль государства и преувеличивают силу глобализации над локальными факторами. В частности, здесь исследуется, как правительства этих двух китайских обществ используют демократизацию для того, чтобы породить и узаконить содержание реформы, и экономическую глобализацию, чтобы оправдать образовательные реформы. В заключение, в данной статье обсуждаются сложные взаимоотношения между этими процессами, включая трения между глобальными и локальными проблемами в образовательной реформе.

The last two decades have witnessed a rise in the number of democratic states as well as increased economic globalization and educational reforms in many countries, as they prepare for the challenges of the new millennium. A great deal of research has been conducted on educational change in relation to either globalization or democratization, but little of it has explored the complex interactions between these three phenomena. Hong Kong and Taiwan provide interesting cases for examining how the interaction of globalization and democratization contributes to educational reform. They also challenge globalization theories which tend to minimize the state's role and exaggerate the dominance of global influences over local players.

This study examines the local nature of educational policies in a globalized age, with reference to two 'pseudo-states' – Hong Kong and Taiwan. Both possess many characteristics of a state, but do not fully enjoy this status under international law. Under the principle of 'one country, two systems', Hong Kong is a special administrative region of the People's Republic of China and enjoys a high degree of autonomy in internal and external affairs, with the exception of military and foreign affairs (National People's Congress 1990). In particular, Hong Kong retains executive, legislative, and judiciary powers. Unlike Hong Kong, Taiwan is a *de facto* political entity with its own independent government and army which are not subject to any higher administration, even though the People's Republic of China claims Taiwan as an inalienable part of China. Since losing the seat in the United Nations representing China to the People's Republic of China in 1971, Taiwan has not regained the status of sovereign nation-state recognized by the international community because of pressure from the People's Republic of China. These subtle issues of international status and recognition, however, are discussed in other studies (Law 2002).

When Hong Kong and Taiwan decided to reform their education systems in response to the pressures of democratization and economic globalization, they also re-designed their citizenship education programs and emphasized such generic and transnational skills as English and information and communication technology (ICT). The present contribution explores the ways in which educational reforms have focused on the elements of globalization that enhance the pursuit of global capital.

Democratization and economic globalization have strongly influenced educational reforms in these two Chinese societies, particularly since the 1990s, and have, to different extents, supported domestic players and concerns. The translation of these global forces into local realities has been facilitated and/or constrained by domestic players, needs, and conditions. Though aided by other education stakeholders, the governments of Hong Kong and Taiwan have been important facilitators of these processes as well as the principal selectors and interpreters of global imperatives for education such as the development of transnational skills. However, their educational reforms have uncovered new dilemmas such as the following: conflict between expanded participation in, and the pace of, educational

planning; conflict between the desire to spread global skills yet emphasize local concerns such as domestic language and technology divisions; and an intensification of the competition between international, national and local languages in school curricula. This study provides a broad discussion of educational reform in the context of globalization and democratization with reference to Hong Kong and Taiwan, examining the processes and substance of that reform and associated issues of global/local tension. (Due to limitations on length, no attempt is made to deal with the influences of globalization and democratization on the re-design of citizenship curriculum in these two societies. This topic merits a separate comparative analysis, although up to now only a few studies have been conducted on each society. These include Law (2002), Leung and Leung (2001), Morris (2002), and Tsai (2002).)

### **Educational reform, economic globalization, and democratization**

Since the 1980s, the international flow of capital, goods, services, information, and people, aided by developments in information and communication technology, has accelerated and intensified throughout the world. These global changes have affected economic, political, social, and cultural activities at various levels (Featherstone, Lash and Robertson 1995; Held, McGrew, Goldblatt and Perraton 1998; Giddens 1999). They have been widely discussed in studies of globalization, but as yet no standard definition or model has been found that transcends the various academic disciplines (Hirst and Thompson 1996; Clark 1999). Radical proponents of economic, political and cultural globalization emphasize the convergent effects of these global changes in various arenas of human activity (Waters 1995). However, despite the unprecedented growth of interconnection and interdependence between peoples around the world, the aspect of convergence in globalization has clearly been oversold (Veseth 1998). The influence of globalization extends far beyond issues of convergence. It is seen in the tensions between globalization and localization, and the diversity of national or local responses to these tensions (Held, McGrew, Goldblatt and Perraton 1998; Schmidt 1999).

Similar tensions can also be found in education systems. Economic globalization and the pursuit of global capital require a redefinition of manpower and a readjustment of institutional infrastructures. In education, the changes brought on by globalization have been manifested via various channels and mechanisms as reforms of structures, modes of financing, administration, and curricula (Green 1999; Carnoy 2000; UNESCO 2000; Astiz, Wiseman and Baker 2002; Carnoy and Rhoten 2002). These channels and mechanisms include educational borrowing from other countries, either voluntary or involuntary, with or without adaptation to local needs and conditions (Dale 1999). Mediators or carriers of globalization include transnational corporations, agencies and donors (such as Microsoft, the International Monetary

Fund, UNESCO, and the World Bank) as well as nation-states and local political, economic and educational elites, particularly those with strong international ties (Dale 1999; Marginson 1999).

Among these mediators, nation-states tend to be the principal agents in interpreting global imperatives for education within their national systems. Radicals (e.g., Usher and Edwards 1994) have predicted a loss of control by nation-states over their education systems, and ultimately their dissolution. However, others are sceptical of such an extreme prognosis (e.g., Green 1997), pointing out that there is little evidence to suggest an abandonment of national education systems. In fact, many nation-states are using the challenges of economic globalization to support their efforts to reform or restructure their education systems (Blackmore 1999).

The widespread fear of losing ground in international economic competition has generally led to a focus on education as a means of improving human resources, enhancing productivity, and increasing capital (Stewart 1996; Crump 1999; Ratnavadivel 1999). This concern is reflected in recent education-reform initiatives in many countries, among them Singapore, the United Kingdom, and the United States (National Commission on Excellence in Education 1983; Department for Education and Employment of the United Kingdom 1997; Ministry of Education of Singapore 1998). Despite considerable convergence in rhetoric and objectives, national education systems differ greatly in policy details, processes and structures because they emerge from different circumstances (such as economic structures and manpower arrangements, political traditions and institutions, and knowledge traditions) and develop at different paces (Green 1999).

Tensions between the convergence-pressurés of economic globalization and the diverse responses to it also appear in school curricula. In many societies, the primary aim of curricular reform has been to promote particular skills for living in the global market such as global awareness, social skills, problem-solving ability, and, especially, proficiency in information and communication technology and foreign languages. There is a popular expectation that information and communication technology will enable a fundamental shift in pedagogy from teacher-dominated learning models to an emphasis on diversified knowledge sources and interactive learning beyond classroom boundaries (Gough 1999; Boyd 2000; Sani 2000). An extraordinary amount of money has already been invested in training teachers in information and communication technology, establishing infrastructures in schools as well as in local or national intranets. Moreover, in many non-English-speaking societies, English is taught as the first foreign language because it is important for international relations and use of the internet. Some countries, such as the People's Republic of China, have extended English courses from secondary to primary education. All of this suggests that education is being seen as the primary means of promoting the "skills of globalization" (Marginson 1999). On the other hand, both Green (1999) and Selwyn and Brown (2000) have argued that differences in political economy and in perceived needs and

values lead to divergent developments in national ICT-policies and -infrastructures. The cases of Hong Kong and Taiwan, as discussed below, demonstrate the complicated tension in learning between international languages and local languages.

In the latter half of the 20th century, a global wave of democratization coincided with economic globalization. The number of democratic states (those in which leaders are elected through a party system and multiple candidatures) rose from 22 in 1950 to 119 in 2000 (International Bureau of Education 2001). Despite their concomitance, there is no conclusive evidence of a direct relationship between economic globalization and democratization. Some see the spread of democracy as an element of globalization. Giddens (2000), for example, argued that the increasing availability of information as a result of information and communication technology furthers democratization. Other scholars have warned that economic globalization may trivialize democracy and freedom (Jones 1999). According to its broad criteria for democratic governance (which include a system of representation, separation of powers, vibrant civil society and independent media), the United Nations Development Programme (UNDP) (2002) points out that, of the new democracies, some have reverted to authoritarianism (e.g., Pakistan), some have become 'pseudo-democratic' (e.g., Zimbabwe), while many others waver between democracy and authoritarianism with limited political freedoms and rights. The UNDP further contends that the international community inevitably suffers from 'democratic deficit' because people do not directly elect their representatives to major international organizations such as the United Nations Security Council, the World Bank, and the World Trade Organization.

Democratic changes are often articulated through educational reforms. These changes and reforms may even be regarded as two 'indivisible and intrinsically related parts' of the same historical dynamic (Carr and Hartnett 1996). This can be seen in the decentralization of power over education in countries such as Argentina, Spain, South Africa, and the former socialist states of Central and Eastern Europe (Hanson 1996, 1997; Heyneman 1998; Sayed 2002). Democracy can be strengthened through various educational processes and mechanisms (Davies 1999; Gutmann 1999). McGinn (1997) suggested that communities with strong democratic traditions are best equipped to shape their education systems in accordance with selected elements of globalization.

Notwithstanding the trend away from centralization mentioned above, there has also been a trend towards centralization in some traditional democracies. For example, despite strong criticism and opposition, the British government increased its control over education by introducing national curricula and by instituting quality-assurance mechanisms that hold schools accountable for the use of taxpayers' money (Department for Education and Employment of the United Kingdom 1997). This example illustrates the experience that, even in an established democracy, the state does not neces-

sarily share power completely with other stakeholders in policy-making processes at all levels. On the contrary, democracy ensures that the elected government has a legitimate mandate to pursue its agenda in spite of popular opposition to certain policies. At the same time, the people have a formal channel, in the form of popular elections, through which the government can be held accountable for poor decisions and performance.

Studies of the relations between educational reform, economic globalization, and democratization are scarce. Nevertheless, studies of education and globalization can shed light on educational reforms in Hong Kong and Taiwan, while those of education and democratization can help to explain how the governments share control over education with other stakeholders. None of these studies can explain, however, how both governments have used globalization issues to push large-scale educational reforms, and, more specifically, how they adapted global imperatives on education and balanced them with local concerns through democratic educational reform movements. The present study sets out to analyze the complex range of issues involved in this process. It argues that, to different extents, both democratization and globalization promote pluralism and equal opportunity for education stakeholders at various levels, enabling them to contribute to educational reform in both societies. However, the advantages of participatory educational reforms can also be undermined by problems arising from local consultation, and the spread of global skills can be limited by the inertia associated with local conditions and socio-political demands.

### **Internal democratic processes and the momentum for educational reform**

Taiwan and Hong Kong launched educational reform movements in the mid- and late-1990s, respectively. These movements formed an integral part of the democratization process since they involved devolution of power, as both governments began to share policy-making with other agencies. This consensual approach was not initiated directly by conventional education bureaucracies: the Education and Manpower Bureau and Education Department in Hong Kong, and the Ministry of Education in Taiwan. Instead, both Hong Kong and Taiwan adopted a common pincer approach, that is, they used a *mediating* agency to force the education bureaucracy to reform the entire education system by applying pressure from the heads of government *above* and from civil society *below*. In addition, territory-wide public consultations involved a maximum number of education stakeholders in forming public policies, thus enhancing the credibility of reform recommendations in societies whose heads of government still lacked full democratic legitimacy.

In both societies, the pincer approach enhanced the popularity of the government, whose legitimacy was under increasing challenge, particularly in the initial stages of democratization. Until its return to the People's Republic of China in 1997, Hong Kong was a British colony and Britain appointed its

Governor. Taiwan, meanwhile, was under the leadership of the Kuomintang for nearly five decades. Representatives of the National Assembly, which was dominated by the Kuomintang until 1996, elected its president.

Since the early 1980s, the governments of Hong Kong and Taiwan have taken significant steps towards democratization, beginning with the legalization of suppressed political bodies and the toleration of activities that were deemed rebellious by the past political leaderships (Law 1997, 2001). In Taiwan, political deregulation led to a series of internal political struggles between the Kuomintang and opposition parties, ending with a peaceful transfer of power from the Kuomintang to the largest opposition party, the Democratic Progressive Party, in 2000. Now Taiwan is a democracy in which citizens elect the heads of government, from president to local chiefs, along with members of the legislative Yuan and councils at other levels.

Compared to Taiwan, Hong Kong's road to democracy has been less direct: Hong Kong experienced an increase in popular representation on the Legislative Council (and district boards) before the handover to China in 1997, followed by a reduction in the years after the handover (Law 1997). Notwithstanding the latter development, the Chief Executive, unlike the Governor in the colonial period, was elected to his second term in 2001 by an Election Committee, which comprised 800 Hong Kong citizens chosen from various sectors and professions. The democratic value of this process is undermined by the fact that these individuals constitute only a tiny minority of the population and had to be acceptable to the central government. The Basic Law promises that the Chief Executive and all members of the Legislative Council will eventually be elected by universal suffrage (National People's Congress 1990, Articles 45, 68). The Basic Law gives the Chief Executive and the Legislative Council the discretion to decide when to hold popular elections, as of 2007. However, many people in Hong Kong have lost faith in democratic development because of recent developments threatening citizens' freedoms of speech and association. For example, the government attempted an amendment to Article 23 of the Basic Law concerning state security and anti-subversion (Security Bureau 2002). Only after 500,000 people demonstrated on 1 July 2003 did the administration withdraw the proposal, promising to revise it so that it would be acceptable to the people of Hong Kong. In April 2004, enthusiasm for democratization was dampened by the decision of the National People's Congress Standing Committee that universal suffrage shall not apply to the election of the Chief Executive in 2007 and the Legislative Council in 2008.

Bearing in mind differing degrees of democratization, the political climate of educational administration and school management changed in both Hong Kong and Taiwan in the 1990s, as the education bureaucracies began to include other education stakeholders in policy-making at various levels. Formerly, education authorities tightly controlled schools' curricula, administration, staffing, and expenditures (Education and Manpower Branch and Education Department 1991; Huang 1995; Zhu and Dai 1996). However, as

the legislature and councils in both societies became subject to public elections in the 1980s, education officials at various levels were invited or summoned to these bodies to explain new policies and to report their progress on a regular or *ad hoc* basis. While education authorities in both Hong Kong and Taiwan are seeing their roles shift from micro-management to macro-supervision, there are clear differences, both in terms of objective and intent, in the ways power has devolved. Since the Teachers Law was enacted in 1995, the Taiwan government has tried to give power directly to teachers rather than to their schools (Legislative Yuan 1995). In contrast, the Hong Kong government attempted to devolve power to school-management committees (the highest authority of governance) and diversify their membership to include representatives of teachers and parents (Education and Manpower Branch and Education Department 1991; Advisory Committee on School-based Management 2000, 2001).

The pincer approaches to educational reform in both Chinese societies, which naturally resulted from the relaxing of their education administrations, shared four major similarities. As a first step, an approach was adopted similar to that taken in Japan (Government of Japan 1988), where a *mediating* educational reform agency, led by elites with a strong global outlook and international ties rather than the education bureaucracy, was given the task of reforming the entire education system. The Taiwan Commission on Education Reform (CER) was created on an *ad hoc* basis and led by Lee Yuan-tze, a Nobel laureate and president of Academia Sinica (the most prestigious research institution in Taiwan). The Hong Kong Education Commission (EC), a longstanding and important education advisory body, was led by Anthony Leung, the chairman of a multinational bank. The second step was to give the chairpersons of the reform agencies in Taiwan and Hong Kong a clear mandate to review educational problems, articulate educational issues, and make recommendations for restructuring the system. Unlike their Japanese counterparts (Schoppa 1991), they were both given full autonomy, and their heads of administration did not intervene in the review processes or become involved in creating the agendas for discussion. They submitted their final reform recommendations directly to the heads of the government, rather than to the education bureaucracies. In the third phase, reform agencies justified comprehensive educational reform by conveying the urgent need to rectify long-standing education problems and prepare pupils for the challenges of economic globalization. Fourth, both reform agencies held numerous public hearings, seminars, and workshops to consult with as many education stakeholders as possible (i.e., school authorities, teachers, parents, employers, community leaders and politicians) in order to encourage a broad debate on how best to reform education (Hong Kong Education Commission 2000; Taiwan Commission on Education Reform 1996). These consultative exercises resulted in the following general consensus: Pupils, parents, and teachers were suffering; the educational system was unable to prepare pupils for the challenges of the new millennium; and comprehensive

educational reform of both the system and the curriculum was necessary and urgent.

The pincer approaches adopted in Hong Kong and Taiwan differed in one vital respect: the way the respective governments received their agencies' proposals. This can be accounted for by a difference in the interactions between key players associated with the educational reforms. In Hong Kong, the Education Commission's final recommendations were submitted to the Chief Executive, and then discussed and endorsed by the Executive Council as the government's new educational policy. The Education and Manpower Bureau and Education Department were 'forced' to accept these proposals and asked to design specific measures to implement them. In Taiwan, by contrast, the Commission on Education Reform's recommendations were not final. As a result of its proactive approach, the Executive Yuan gave the Ministry of Education a chance to use the Commission on Education Reform's final report, alongside other reports, as the basis for developing its own reform plan (1996) which led to the final Comprehensive Plan of Education Reform in 1997.

Differences in the roles and responses of the educational bureaucracy and civil society during the reform movements led to different treatments of the respective commissions' proposals. In Hong Kong, the Education Commission primarily initiated and set the agenda for public discussions, through which it solicited views on its proposals. The educational authorities played a supporting role in organizing and promoting activities for the Education Commission. School-sponsoring bodies, schools, teachers, pupils, and the public all were invited to participate in these consultations and were encouraged to organize their own discussions. Although some dedicated groups occasionally commented on educational policies during and after the consultation period, no conspicuous, organized civil-education movement emerged.

By contrast, the Ministry of Education and civil-education groups in Taiwan competed with the Commission on Education Reform to set the reform agenda and articulate educational problems and issues. Indeed, the Commission on Education Reform was set up in response to the emergence of organized civil education movements. After martial law was lifted in 1987, civil-education groups, such as the April 10th Education Reform Alliance, began to flourish and gradually developed into three main civil-education movements that respectively lobbied for university autonomy, reform in primary and secondary education, and teachers' human rights (Xue 1996). In order to regain its leadership in educational reform, the Ministry of Education in Taiwan adopted a more proactive approach. During the consultation period, the Ministry published an unprecedented report that reviewed past educational achievements, explained its position on various educational issues, and outlined its plans for educational reform in the late 1990s and early 21st century (Ministry of Education 1995). The Ministry of Education proposed that the Commission on Education Reform adopt the report as an important reference document, and educational officials put across the government's posi-

tions in different public forums, including those organized by civil-education groups.

Such politically decentralized educational reforms came at a cost. First, the use of mediating reform agencies in both Hong Kong and Taiwan undermined the credibility of the education bureaucracies and involved a tacit admission that their conservatism was a barrier to educational reform. Additionally, the authority of education officials was undermined, and, in the case of Hong Kong, even marginalized. Second, many public consultation seminars focused on complaints from schools, teachers, parents, pupils, and the local community about education officials, and from other education stakeholders about schools and teachers. Third, during the consultation period, which lasted about two years, the Hong Kong and Taiwan public (including teachers and parents) were often unsure about who should frame and lead the reform – the education-reform agency or the education bureaucracy – and which of the two would most faithfully interpret and implement their recommendations. Finally, the lengthy educational reform processes inevitably delayed decisions. It should be noted here that despite an increase in accountability to their citizens through elected bodies, the Hong Kong and Taiwan governments do not necessarily consult widely with educational stakeholders on other policy-making issues as they did with recent educational reforms.

### **Economic globalization as an external challenge for educational reform**

Two major, interlinked points of discussion emerged from the participatory education-reform movements of Hong Kong and Taiwan: the inadequacy of their educational systems to prepare pupils for the challenges of the new millennium and the urgent need to change this. It is argued here that economic globalization provided an opportunity for both governments to reposition their economies and reorient their education systems. This is demonstrated by the manner in which they accommodated global imperatives in education and curriculum reforms, particularly the emphasis on learning English and information and communication technology as transnational skills.

#### *Education and curriculum reforms for economic globalization*

Taiwan's and Hong Kong's labor-intensive economies of the 1950s were transformed in compliance with the global market of the 1990s. They became, respectively, an important producer of information technology and an international financial center. Despite these changes, and following the Asian financial crises of the late 1990s, Hong Kong and Taiwan, like Australia, Singapore, and the United States, have been fearful of losing ground to other countries, especially in Asia, in the competition for global capital. Both have planned to diversify their strengths in order to compete with emerging

economies, particularly Mainland China. Also, both have predicted that they will need more highly qualified manpower, for example, in the areas of languages, information and communication technology, and research and development (Education and Manpower Bureau 2000a; Executive Yuan 2002).

The governments of Hong Kong and Taiwan have declared that their current education systems cannot adequately meet these new manpower needs, but they still believe that education, once reformed, can help to maintain and enhance their capacity to compete in the global economy. In Hong Kong, the Education Commission (2000: 27) delivered a strongly worded warning to the government and the public: "The world has changed, so must the education system." The changes proposed included replacing the industrial economy with a knowledge-based economy and rapidly developing an infrastructure for information and communication technology. The Taiwan Commission on Education Reform issued similar warnings. Both governments proposed reorganizing their educational systems and have accordingly adopted global policy objectives and themes. The global requirements identified for education include promoting life-long education; re-emphasizing the quality of pupil's experience; reorganizing subjects into key learning areas so as to develop a broad knowledge-base among pupils as well as the ability to think critically and innovate; promoting multicultural education and fostering of global awareness and outlook; and raising levels of professionalism among teachers (Taiwan Commission on Education Reform 1996; Ministry of Education 1997; Hong Kong Education Commission 2000).

Curricula can reveal how educational reform affects teaching and learning in schools. Following their broad education reform proposals, Hong Kong and Taiwan developed new curricula for primary and junior secondary schools (Ministry of Education 2000; Curriculum Development Council 2001, 2002). They intended to change their examination orientation and subject boundaries, which together have been blamed for inhibiting the cultivation of innovative and flexible manpower for the knowledge-based economy (Table 1). The first change proposed was a movement away from a subject-based curriculum to an integrated one, specifically within the framework of key learning areas. The purpose of this change was to help blur the conventional boundaries between subjects, to enhance the continuity of the primary and secondary school curricula, to eliminate the artificial and early streaming of pupils into art, science, and commercial groups, and to equip them with a broader knowledge-base. Another intended change common to both systems was a new emphasis on achieving basic competencies across the different key learning areas, moving away from simple rote learning and the mere transmission of knowledge on traditional subjects. Despite different wording, the basic competencies included in both programs include personal and social skills (e.g., creativity, critical thinking, communication and collaboration) and transnational skills for survival in the globalized knowledge economy (e.g., foreign languages, information and communication technology, and global awareness).

Table 1. Comparison of curriculum reform proposals for primary and junior secondary education in Hong Kong and Taiwan

Hong Kong	Taiwan
<p><i>Key learning areas</i> Eight areas: Chinese; English; mathematics; personal, social, and humanities education; science; technology; art; physical education</p>	<p>Seven areas: languages (including Chinese, English, local dialects and indigenous languages); mathematics; nature, science and technology; health and physical education; social studies education; art; integrated activities</p>
<p><i>Basic competencies</i> Nine types of basic skills: collaboration; communication; creativity; critical thinking; information technology; numeracy; problem-solving; self-management; study</p>	<p>Ten types of basic skills: self-understanding and development of potential; appreciation, performance and invocation; expression, communication and sharing; ability to respect others, care about society and team cooperation; cultural learning and global understanding; planning, organization and practice; science, applied science and information technology; exploration and research; critical thinking and problem-solving.</p>

Sources: Curriculum Development Council 2001; Ministry of Education 2001.

The proposed curriculum changes confront three major obstacles in both Taiwan and Hong Kong. First, while the determined, large-scale promotion of curriculum reform aroused many teachers' hopes, many others remain pessimistic and have adopted a 'wait-and-see' approach, justified not least by the failure of past reform initiatives. Many teachers working within both systems have been unable to respond to curriculum changes that require greater professional ability because they are already over-burdened with administrative tasks. Consequently, they have been criticized for their lack of ability to adapt and for an over-reliance on textbooks (Zhou et al. 2000; Cai 2001). Second, schools are generally not ready to integrate those subjects that would require deploying new teachers and retraining others, particularly where the subjects are seen as out-dated or less essential. This problem is more serious in secondary than in primary education because there are more subjects that require specialized teacher training. Also, there is a greater general pressure on pupils and schools due to examinations, which are still used as a major mechanism in selecting pupils for higher education. Third, teacher-education providers in both educational systems are also not ready for the changes, since their programs are still mainly geared to the traditional division of subjects. Fortunately, there are signs that teacher-education systems are beginning to develop interdisciplinary programs for in-service and pre-service teachers.

*Emphasis on information and communication technology and English as transnational skills*

The teaching of information and communication technology and foreign languages in Hong Kong and Taiwan has received special attention because of the importance of both to pupils' mobility and communication in the increasingly globalized economic and information networks. Both governments circulated ICT-master plans for education and invested millions of dollars on ICT-infrastructure in schools and for teacher training (Education and Manpower Bureau 1998; Ministry of Education 1998, 2001). Both governments expected ICT to change teacher-centered and textbook-bound modes of learning in favor of an emphasis on more interactive and pupil-focused learning with diverse sources of knowledge. To achieve this, teachers are expected to use ICT for a certain percentage of class time and preparation: 20% in Taiwan and 25% in Hong Kong. Consequently, both governments have established criteria for their teachers' ICT proficiency. While working teachers are required to reach ICT benchmarks within specific periods, new teachers must reach a certain level before even joining the profession.

As is the case with ICT, the learning of foreign languages has become increasingly important in both of these Chinese societies. In contrast to the decline of Portuguese in Macao, which was returned by Portugal to the People's Republic of China in 1999, English has not been demoted in Hong Kong since the former colony's return to the People's Republic of China in 1997. On the contrary, economic globalization and new developments in ICT have increased the importance of English. The post-colonial government even officially advocated a policy of biliteracy in Chinese and English and trilingualism in Cantonese, English, and Putonghua. For over a century of British rule, English in Hong Kong had been seen as a key to upward academic, social, and career mobility (Johnson 1998). It was the predominant foreign language in nearly every local school, from pre-school to secondary level. Despite this, many employers and teachers complain of declining proficiency in English (as well as Chinese) among graduates, while some parents and educators also question the proficiency of English-language teachers.

Hong Kong has adopted a series of measures to improve pupils' language proficiency. To create an Anglophone learning environment, the Hong Kong government has provided each public secondary school with a native-speaking English teacher (NET) since 1998, and introduced a similar scheme for public primary schools, with one native-speaking English teacher serving every two schools by 2002/03. The government now requires all serving English-language teachers (and Putonghua teachers) to pass language proficiency assessments or prove their exemption by 2006, and, starting in 2004, all new English-language teachers must meet a basic language proficiency standard before beginning employment (Education and Manpower Bureau 2000b). Among further measures adopted was a requirement, introduced in the early

1990s, that universities set exit examinations in English proficiency. The official adoption of a voluntary English examination as the common English proficiency assessment for all graduating university students began in 2002/2003 (University Grants Committee 2002).

Unlike Hong Kong, where pupils start learning English in kindergarten, the compulsory learning of English in Taiwan used to begin only at junior secondary level. In 1998, nearly half of Taiwan's primary schools offered English lessons on a voluntary basis, while many children also took lessons at supplementary schools (Chou 2002). In 2001, under the pressure of economic globalization, the central government began officially providing compulsory English lessons to primary grade five across the island, and in eight of the 25 counties and municipalities these lessons were extended down to primary one. Subsequently, the central government compelled schools to extend English lessons down to primary three by 2005. Unlike in Hong Kong, English language teachers in Taiwan have not yet been required to pass a proficiency assessment. Moreover, in the new national development plan (2002–2007), Taiwan's central government committed itself to improving the English language environment across the island. The plan promised to enhance the entire population's English proficiency, extend English language assessment for aspiring senior civil servants to lower entry levels, and deliberately create an Anglophone environment by converting road signs, building names, shop names, and restaurant menus to a bilingual (Chinese and English) format by 2008 (Executive Yuan 2002). In 2003, the central government revised the Employment Services Law, allowing native English teachers to serve not only private, but also public schools; and it began to recruit over 3000 of these teachers for public primary and junior secondary schools.

#### *Challenges to the promotion of transnational skills*

The general adoption of information and communication technology and English as transnational skills in the Hong Kong and Taiwan education systems has resulted in a disparity between schools and thus challenged the vitalization of local/national languages. In Hong Kong, the language-divide and the disparity in the availability of ICT between urban and rural areas is not obvious because of the territory's small geographic area and a blurred demarcation between urban and rural areas due to the rapid development of the latter. Furthermore, nearly all public schools receive the same financial provision and support from the government. Nonetheless, there are marked differences between linguistic and ICT aptitudes because of differences in pupils' background and support of families and schools. In particular, the medium of instruction policy of 1997, as will be explained later, has begun to institutionalize and reinforce, rather than dissolve, the divide between pupils of schools using English as the medium of instruction and those using Chinese.

In contrast to Hong Kong, regional disparities in ICT and foreign-language proficiency in Taiwan are wide and complex. Three major factors con-

tribute to differences between pupils' conditions for learning English. The first of these concerns the more pronounced Anglophone environment in urban areas: In cities such as Taipei, pupils see English on bilingual restaurant menus and on road signs and meet foreign tourists. The second differentiating factor concerns the disparate financial power of local governments, which leads to variations in when pupils begin learning English: Rich county and municipal governments often offer English lessons starting in primary grades one or two, rather than at grade five as required by the Ministry of Education. The third factor relates to the pupils' socio-economic background. On average, parents in cities have higher incomes than those in rural areas. Many wealthy parents, whether in cities or rural areas, send their children to learn English beginning in kindergarten. They also may send them to after-school tutors and English immersion programs in New Zealand, the United Kingdom, or the United States. While many parents realise that starting English at a young age does not necessarily guarantee better proficiency later, they do not want their children to be at any disadvantage, since high English examination scores are still an important condition for admission to senior secondary and higher education. A similar distinction pertains in Taiwan between those who have access to ICT and those who do not (Chen 2002; Wu 2002). Fortunately, the Taiwan government recognizes the seriousness of both inequalities and has suggested some measures to limit them (Executive Yuan 2002).

Hong Kong and Taiwan, as a result of their basic demographic make-up and recent socio-political changes, exemplify the difficulties of promoting both English and local languages in the school curriculum. Ethnic Chinese are dominant in both societies. Hong Kong has a population of seven million, comprising Han Chinese (95%) and other nationalities, including Filipinos (2.1%), Indonesians (0.8%), British (0.3%), and Indians (0.3%) (Census and Statistics Department 2002). The official languages of Hong Kong are English and Chinese, the latter having only gained official status in 1974. Taiwan has a population of 23 million, consisting of Han Chinese (98%), as well as ten indigenous ethnicities and a further 60 non-Han minorities (Government Information Office 2002). Of current residents, 15% either moved or had ancestors who moved to Taiwan with the Kuo-mintang from Mainland China in the late 1940s. Since then, Mandarin, the major language of the mainlanders, has been the only common national oral language (and is slightly different in pronunciation from Putonghua, which is used in the People's Republic of China). The rest of the population are known as 'native Taiwanese': those who had arrived, or whose ancestors had arrived from Mainland China, before the late 1940s. About three-quarters of them speak Minnanese and one-quarter speaks Hakka. No local dialects or indigenous languages have been given an official status.

Recent socio-political changes in Hong Kong and Taiwan provide a very important opportunity for vitalizing the role of local/national languages in the school curriculum. In Taiwan, Mandarin has been the common med-

ium of instruction in schools, and local dialects were prohibited until recently. After the political liberalization of the late 1980s, various social and political groups began to call for the preservation of native languages, particularly indigenous languages and Hakka, which had been excluded from the school curricula and marginalized in society generally (Law 2002). In the late 1990s, the central government finally gave in to these demands and incorporated native languages into the new education curricula, although without according them the same status as Mandarin. Since 2001, primary school pupils, regardless of their provincial affiliations, and depending on their schools' resources, have been required to take one or two lessons a week in a native language (Minnanese, Hakka, or one indigenous language). Junior secondary pupils can take one native language as an elective subject (Taiwan Ministry of Education 2000). The government is also drafting a law to give 14 native languages the same legal status as Mandarin.

In Hong Kong, the use of the principal dialect, Cantonese, as the medium of instruction in schools, and the learning of the national oral language (Putonghua), received much attention with the return of sovereignty to the People's Republic of China. Hong Kong has been in a dilemma regarding whether to use Chinese or English as the medium of instruction, particularly in secondary schools (Adamson and Lai-Auyeung 1997; Johnson 1998; Pennington 1998). Formerly there was no official policy on medium of instruction (MoI), although Chinese was used in most primary schools. Before the return to China in 1997, most secondary schools used or claimed to use English, which was generally preferred by pupils and their parents. Immediately before the handover to China in 1997, the Education Department introduced unprecedented guidance on the medium of instruction, with a view to promoting mother-tongue education and rectifying the problems of mixing Chinese and English in class (Education Department 1997). As a result, 223 secondary schools were forced to change their medium of instruction to Chinese at secondary levels one to three beginning in 1998, and 114 secondary schools (mostly those with greater prestige in the eyes of teachers and pupils) were allowed to use English. The proportion of teaching periods using Chinese in non-language academic subjects reportedly increased from 33% in 1998/1999 to 56% in 2001/2002 (Education Department 2001). Meanwhile, Putonghua, the official national oral language, has become increasingly important in Hong Kong's school curricula. Unlike in the rest of the People's Republic of China, the central government has refrained from imposing Putonghua as the medium of instruction in the schools of Hong Kong in the interests of maintaining the territory's political stability and international status. Despite this, in 1998, Putonghua was officially incorporated as a core subject into the curricula of primary and secondary schools, and the number of primary schools offering it as a timetabled subject increased from 468 in 1997 to 780 (94%) in 1999, and from 272 to 411 (97%) in secondary schools over the same period.

The handover of Hong Kong to the People's Republic of China has seen a major change in the linguistic divide – from the colonial division between English and Chinese to a new three-way division between English as an international language, Putonghua as the national language shared with the People's Republic of China's economic and political elites, and Cantonese as the common dialect. The new division also indicates the different internal perceptions of Hong Kong as either a predominately Cantonese-speaking society, a special administrative region of the People's Republic of China, or as a member of the global economy. In contrast to this three-way divide in Hong Kong, the language divide in Taiwan reflects a dual perception of Taiwan as a member of the international economy and an independent political entity that is separate from the People's Republic of China.

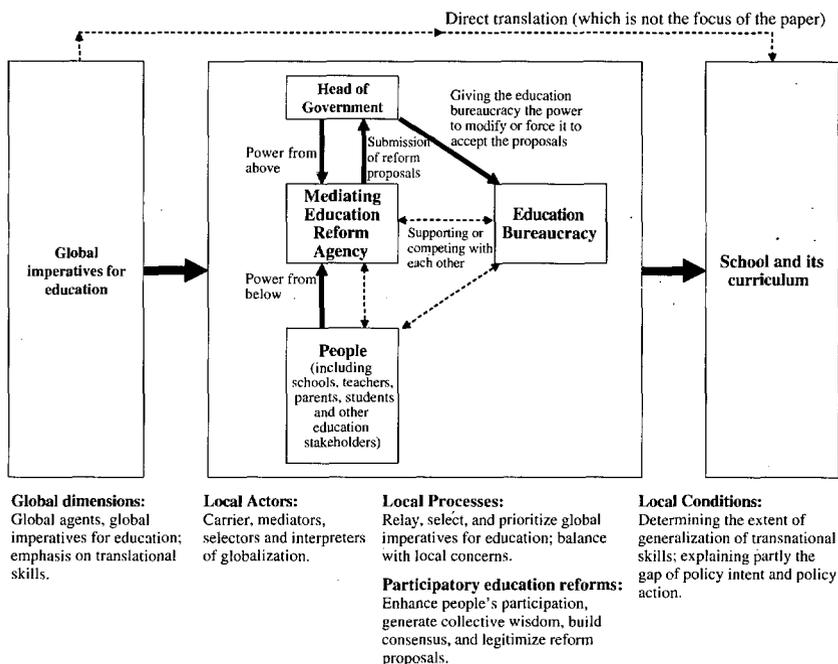
### Discussion

Whether the more comprehensive nature of education, and particularly the curriculum reforms in Hong Kong and Taiwan, can help prepare pupils for the challenges of economic globalization in the 21st century remains to be seen. In any case, the educational reforms in Hong Kong and Taiwan represent an interesting and complex interplay between the ideologies of democratization and economic globalization and partly explain the gap between policy intent and policy action in the translation of global imperatives into local realities (Figure 1). Globalization and localization are two aspects of the same phenomenon (Robertson 1995; Blackmore 1999). In preparing pupils for the challenges of an increasingly interconnected and interdependent world, educational reform and related policies need to address both global demands and local needs. But the process of translating global imperatives for education is always intertwined with local processes of social change (in the cases of Hong Kong and Taiwan, the most significant of these being democratization) and educational reform that are facilitated and/or constrained by local players and conditions. This interweaving in turn gives rise to tensions between global and local concerns in globalization-oriented educational reform.

#### *Globalization and democratization as important impetuses to educational reform*

The cases of Hong Kong and Taiwan not only challenge Jones' (1999) warning that globalization trivializes democracy, but also demonstrate how economic globalization, combined with democratization, can provide an important impetus towards educational reform. Despite their differences, the development of democracy in both of these Chinese societies support the pincer approach as an alternative to top-down or bottom-up strategies for

Figure 1. The local nature of education policy in the globalizing world



globalization-focused educational reform. Both globalization and democratization, in fostering the qualities of openness and plurality, can provide 'space' for international and local players to manoeuvre and accommodate both global and local concerns. In particular, the government and local elites must be seen not just as mediators or carriers, but also as selectors and interpreters of globalization, based on local needs and conditions. In addition to promoting certain transnational skills in the school curricula, they can use the notion of globalization to convince the public of the need for urgent reform. Despite the inevitable need for more time and effort, and possible confusion about the role of educational bureaucracy in leadership, consultative exercises are a good means of spreading a sense of urgency as widely as possible. They also help to solicit and promote collective understanding for large-scale educational reform, to develop consensus on its directions and contents, to address long-standing educational problems, and to legitimize the adoption of selected global imperatives for education. Working with a mediating reform agency, empowered by both the head of the government from above and the people from below, can further help to spur the traditional education bureaucracy into action, if only to assert itself, and make additional or even alternative recommendations to those of the reform agency.

*Tensions between global and local concerns in educational reform for economic globalization*

The translation of global imperatives for education into a local process, as argued here, is subject to the constraints of local players and conditions, thereby exposing three major interrelated tensions at a domestic level. The first of these tensions concerns the difference in the pace and readiness of different players, particularly government and teachers, for curriculum changes in response to selected global imperatives. The need to develop flexible and reflexive manpower for economic globalization, as urged in the general discourse on globalization (Ratinoff 1995; Giddens 1999), can provide an opportunity to remodel the school curricula. However, curricular changes cannot happen overnight. Remodeling of curricula inevitably creates a gap between reform idealists (such as government and local elites) who press for changes, and reform implementers (including teachers and teacher-education providers), who are relatively conservative or even reluctant to change. The gap can be narrowed only when the former can offer more time, understanding, and support to the latter. In particular, as shown in the cases presented here, teachers, who play a key role in curricular reform, require psychological preparation to arouse and sustain their belief in reform, as well as retraining to help them acquire new skills and re-acquaint themselves with curricula and pedagogy.

The second tension relates to the growing disparity in local pupils' access to global skills. The idea that education provides an important incubator for agents of globalization and a primary means of disseminating the "skills of globalization" (Marginson 1999) is seen in practice in many societies, including Hong Kong and Taiwan. The emphasis on learning English and information and communication technology-skills in preparation for economic globalization can mean that these skills are transformed from status symbols into necessities. However, the process of disseminating globalization skills merely reduces, rather than eliminates, domestic language and technological divides, thus taking us from the classic divide between the 'haves' and 'have-nots' to a newer one between the 'haves' and 'have-lesser'. This can be explained by the fact that the extent of dissemination is often determined more by domestic needs and conditions (e.g., the government's financial support and the school environment) than by external pressure. Moreover, acquiring foreign-language proficiency and ICT-skills is arguably socio-economically related: Pupils from rich families have more opportunities and better conditions for learning than those from poor families.

A third and more subtle tension arises from the balance between the economic and socio-political purposes of education. In many countries that view economic success in the global market as vital to national survival (such as the People's Republic of China and many Southeast Asian countries), the economic function of schools has dominated the political agenda of educa-

tional reform, and “globalism has placed a premium on the enhancement of the individual’s sense of personal identity” (Porter 1999: 9). However, the proliferation of certain global skills, such as international languages, is not purely an issue of economics and manpower; it also requires socio-political considerations. The challenges of economic globalization, and the maintenance and development of domestic socio-political identity play an equally important role in the survival of these countries. As noted by Watson (2000), non-English-speaking societies are forced to choose between promoting English under pressure of globalization or promoting indigenous languages. In societies like Hong Kong and Taiwan, the complex interactions between economic globalization and domestic socio-political changes can provide a space for both the international language (English) and national and local languages, thereby avoiding not only the global domination of the former, but also the domination of economic factors in education. On one hand, the status of English in many non-English-speaking economies has changed from the language of the elite to an important skill for all people because of the pressing economic need to pursue capital beyond geopolitical borders. On the other hand, the use of national and native languages, as symbols of national and local identity, has become as important as fluency in English as a symbol of global identity. If non-English-speaking societies have languages that are important in the global economy and can be established as international ones, they are in a better position to resist the domination of English. The economic importance of Putonghua in Hong Kong and Mandarin in Taiwan has increased because of the blessing of the People’s Republic of China, whose rising economy has drawn the world’s attention, particularly since its accession to the World Trade Organization in 2002.

## **Conclusion**

This study has demonstrated the local nature of educational policy in a ‘global’ age, with particular reference to educational reforms in Hong Kong and Taiwan that have responded to changes in the wider contexts of democratization and economic globalization. It has also discussed major issues arising from the complex interactions between the three processes of democratization, globalization and education. Both cases challenge some of the predictions of the globalization experts and show that economic globalization does not necessarily trivialize democracy, minimize the role of state, or lead to the domination of international over national or local languages. Despite the lack of a direct relationship, democratization and economic globalization share qualities of openness and plurality, and have been equally important stimulators of educational reform. As in the political system, democratization in education, as a local power-sharing process, has created space and mechanisms for local players to exercise their rights and duties. In addition,

it has allowed immediate local concerns to be aired within debates over educational reforms. The translation of global imperatives for education into local realities is a local process requiring local support and resources. Therefore, it depends on facilitating and constraining domestic players and local conditions. As a result, local concerns and global imperatives for education intersect with and sometimes reinforce each other, as shown in the complex issue of the dissemination of selected global skills, including foreign languages and information and communication technology.

However, caution should be observed concerning the dissemination of global skills. The importance of ICT and particularly foreign languages should not be over-emphasized. There are many other types of knowledge, experiences, and skills (such as basic life and social skills, critical thinking, and aesthetic appreciation) that are equally worth learning and equally important to human survival and fulfilment in an increasingly inter-linked and complex world. The promotion of global skills should also not take precedence over support for pupils whose interests, needs, abilities and future careers are not necessarily related to ICT or foreign languages. Despite the challenges of economic globalization, what they need are perhaps simple vocational foreign-language ability and minimal ICT-skills for their jobs and daily lives. Thus, global and local concerns should be carefully balanced when formulating and promoting educational policies.

The overwhelming domination of English on the internet and in the school language curriculum in non-English-speaking societies can be mitigated to some extent if international languages become more varied in a global age. On one hand, in non-English-speaking societies like Hong Kong and Taiwan, schools and parents should not blindly pursue the learning of English and see it as more prestigious than their local/national languages. On the other hand, more effort should be given to promoting other international languages. It is a good sign that, compared to the 1980s, more pupils in English-speaking societies are today learning languages of other countries, including Asian ones. In addition, more people who come from English-speaking societies do business or earn their living in other countries and communicate fluently in local languages – for example, Japanese, Putorghua, and Russian. If the diversification of international languages can be promoted further, pupils in English-speaking societies will have more opportunities to learn other countries' languages, and the pressure on pupils in non-English-speaking societies to learn English will be reduced to some extent. This is consistent with the spirit of globalization (and democratization) that advocates, at least rhetorically, plurality and equality among peoples and economies. To go global is, arguably, to become local in different parts of the world; to experience, enjoy, and respect local cultures; and to learn and communicate, though not necessarily fluently, in local languages.

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