



United Nations  
Educational, Scientific and  
Cultural Organization

UNESCO Bangkok  
Asia and Pacific Regional Bureau  
for Education

# Education Policies to Make the Economy Work

A Case Study of Lifelong Learning and Employment Prospects  
in Hong Kong SAR, China



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in Hong Kong SAR, China

Jun Li and Cristina Pinna

Published by UNESCO Bangkok  
Asia and Pacific Regional Bureau for Education  
Mom Luang Pin Malakul Centenary Building  
920 Sukhumvit Road, Prakanong, Klongtoey  
Bangkok 10110, Thailand

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ISBN 978-92-9223-456-0 (Electronic version)

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Design/Layout: Warren Field  
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## Preface

*Education Policies to make the Economy Work* was the second case study report to be developed as part of an ongoing UNESCO research project on Lifelong Learning and Employment Prospects/Employability in the Asia-Pacific region, initiated by the Asia and Pacific Programme of Education for All (APPEAL), UNESCO Bangkok.

Lifelong Learning (LLL) is vital for individuals and nations. The skills developed through LLL are important not just for the well-being of young people and adults, but for employment and economic prosperity. Today's growing globalization, fast-paced global changes, and the continuous rollout of new technologies call for not only specific job-related skills and knowledge to be continuously updated, but general competencies to be developed and strengthened, which enable people to adapt to be successful in this ever-changing work environment. There is a strong need, particularly in Asian countries, to overcome the traditional divide between learning and employment. In this climate of rapid change, such a strict divide can no longer be sustained. The trend of lifetime employment is disappearing and being replaced by new management models that encourage expertise and work experience. Across the world, higher levels of skills are emerging as an increasingly important requirement for avoiding unemployment, low incomes and job insecurity. In this increasingly skills-based economy, there is a risk that many people might be left behind and marginalized by globalization and the digital revolution. In fact, in many developed countries, entering or re-entering labour markets with low skill levels, especially for youth and older workers with few qualifications, results in insecure employment and low wages.

LLL has a key role to play in building on diverse individual competences while meeting the differing needs of learners by ensuring equality and access, particularly for those of disadvantaged groups such as people with low literacy skills, early school-leavers, the unemployed, older people, migrants and people with disabilities. The need to embed the principles of LLL in education and broader development policies is becoming increasingly more urgent. Fairer and more efficient training systems in various settings, such as continuing education, vocational training and on-the-job training, is most needed to bridge skill gaps. A number of countries in Asia and the Pacific face an urgent need to review and reform policies in order to match education and training systems more closely to employment markets and are seeking a direction for effectively increasing and enhancing their citizen's employability.

In this context, UNESCO Research Project on Lifelong Learning and Employment Prospects/Employability in the Asia and Pacific Region aims to facilitate the formulation of LLL policies, strategies and programmes for enhancing employment prospects or employability of working-age citizens in the Asia-Pacific region. Through insights gained from a comprehensive and comparative understanding of LLL, employability and their interactions in Asia and Pacific region, with particular focus on policy initiatives and their socio-economic contexts, we can consider concrete and applicable policy recommendations about how to design and implement effective LLL policy to enhance the employability of every citizen in Asia-Pacific countries.

UNESCO Bangkok wishes to express appreciation for Jun Li of Chinese University of Hong Kong and Cristina Pinna of University of Cagliari for their contribution to the development of this case study.



We hope that this case study will help spark ideas to review, affirm and strengthen policy, planning and implementation of lifelong learning education. We welcome queries, comments and suggestions that may be addressed to:

Asia-Pacific Programme of Education for All (APPEAL)  
UNESCO Bangkok  
920 Sukhumvit Road, Prakanong, Klongtoey, Bangkok 10110, Thailand  
TEL.: 66-2-3910577, FAX: 66-2-3910866  
Email: [appeal.bjk@unesco.org](mailto:appeal.bjk@unesco.org)



# Executive Summary

The general focus of this research is on the role played by the reform of the education system in Hong Kong SAR, China with particular reference to the development of the lifelong learning sector. Up to 1997, the Hong Kong education system used to roughly follow the British pattern but after the handover of sovereignty to mainland China, reforms have been implemented according to different needs. Three main factors can be underlined for the improvement of the Hong Kong education system and the lifelong learning sector: (1) the globalization process and the emerging new world economic structure; (2) the Asian financial crisis at the end of the nineteen nineties which underlined the fragility of Asian economies; (3) the reunification of Hong Kong with mainland China.

The study aims mainly to analyse the impact of lifelong learning (LLL) policies on employment prospects and employability. This case study report on Hong Kong is part of a UNESCO Bangkok Research Project on Lifelong Learning and Employment Prospects/Employability.

*The main objectives of this study refer to the analysis of:*

1. Political history, economy, society, education and labour and their relation with the development of an LLL sector. The analysis of these factors has been particularly useful for understanding the basis on which the lifelong learning sector has developed in Hong Kong.
2. Current policies, strategies and practice in LLL. This analysis – which covers the third, fourth and fifth chapters – describes LLL policies and their implementation. It answers the specific objective of this report – the relation between LLL and employment – by analysing the instruments adopted in Hong Kong to define the specific needs of employees and employers, learners and trainees.
3. Strong and weak points of the Hong Kong case study. This evaluation, mainly in the last section of the third chapter and in the Conclusions – defines the main features of LLL policies, implementation and final results in order to understand in which way future policies can be implemented in the specific Hong Kong case and also in other countries or regions.

The research was conducted through an investigation of existing LLL policies, strategies and programmes offered through formal, non-formal and informal channels. The report starts with an introductory section that explores how the concept of lifelong learning has evolved in the last decades. It underlines the importance of Hong Kong as a case study in the analysis of LLL policies and employment prospects. Hong Kong represents, in fact, a unique case study in the analysis of the development of lifelong learning education being the last British colony in the Far East and the first Special Administrative Region of the People's Republic of China.

Data was collected mainly between July 2012 and January 2013. This research was carried out consulting the documentation of laws and regulations adopted, and the critical analysis of formal ministerial speeches and initiatives. Emphasis was given to the work of the Education Bureau (EDB), the Labour Department and the Labour and Welfare Bureau. The majority of data related to the economic and social profiles of the Hong Kong case study was gathered through the Trade and Industry Department and the Census and Statistics Department. A literature review was useful to develop a critical understanding of the argument, to raise effective comments and to compare the Hong Kong developments with other case studies especially within the Asia-Pacific framework.



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# Acronyms

<b>ACTEQ</b>	Advisory Committee on Teacher Education and Qualification
<b>CAT</b>	Credit Accumulation and Transfer
<b>CEF</b>	Continuing Education Fund
<b>CityU SCOPE</b>	City University of Hong Kong, School of Continuing and Professional Education
<b>CSSA</b>	Comprehensive Social Security Assistance
<b>CUHK SCS</b>	Chinese University of Hong Kong, School of Continuing Studies
<b>EC</b>	Education Commission
<b>EDB</b>	Education Bureau
<b>EFA</b>	Education for All
<b>ENP</b>	Employment Navigator Programme
<b>ERB</b>	Employees Retraining Board
<b>EU</b>	European Union
<b>FCE</b>	Federation for Continuing Education in Tertiary Institutions
<b>GDP</b>	Gross Domestic Product
<b>GIP</b>	Internship Programme for University Graduates
<b>HKALE</b>	Hong Kong Advanced Level Examination
<b>HKCAA</b>	Hong Kong Council for Academic Accreditation
<b>HKCAAVQ</b>	Hong Kong Council for Accreditation of Academic and Vocational Qualifications
<b>HKCEE</b>	Hong Kong School Certificate Education Examination
<b>HKEAA</b>	Hong Kong Examinations and Assessment Authority
<b>HKSAR</b>	Hong Kong Special Administration Region
<b>HKTDC</b>	Hong Kong Trade Development Council
<b>HKU SPACE</b>	Hong Kong University School of Professional and Continuing Education
<b>ITACs</b>	Industry Training Advisory Committees
<b>JQRC</b>	Joint Quality Review Committee
<b>LLL</b>	Lifelong Learning
<b>LPAT</b>	Language Proficiency Assessment for Teachers
<b>LWB</b>	Labour and Welfare Bureau
<b>OLI</b>	Open Learning Institute of Hong Kong



<b>OUHK</b>	Open University of Hong Kong
<b>PolyU SPEED</b>	Polytechnic University, School of Professional Education and Executive Development
<b>PRC</b>	People's Republic of China
<b>PVE</b>	Professional and Vocational Education
<b>QF</b>	Qualification Framework
<b>QR</b>	Qualifications Register
<b>RPL</b>	Recognition of Prior Learning
<b>SCE, HKBU</b>	School of Continuing Education, Hong Kong Baptist University
<b>SCSs</b>	Specification of Competency Standards
<b>SGC</b>	Specification of Generic (Foundation) Competencies
<b>SIGI</b>	Social Institutions and Gender Index
<b>SMEs</b>	Small and medium enterprises
<b>TFEC</b>	Task Force on Economy's Challenges
<b>TSA</b>	Territory-wide System Assessment
<b>UGC</b>	University Grants Committee
<b>UNDP</b>	United Nations Development Programme
<b>UNESCO</b>	United Nations Educational, Scientific and Cultural Organization
<b>UoC</b>	Units of Competency
<b>VTC</b>	Vocational Training Council



# PART ONE

## Hong Kong – Defining a Case for Lifelong Learning

### Chapter 1

#### *Political, Economic and Social Profiles*

### Introduction

This chapter gives a picture of Hong Kong's economic, political and social profiles in order to define an investigative framework for this study. The aim is to underline the main elements that serve to outline the Hong Kong case study. The historical background is particularly important for the understanding of the British influence in the development of Hong Kong. Secondly, it is also the key to understanding the strong connection with China which determined the expansion of the Hong Kong economy in the last decades and its politics. Particular attention is given to delineating social profiles which describe current population data by gender and age groups together with information about ethnicity and languages spoken.

### 1.1 A Historical Political Overview

#### 1.1.1 A Historical Picture

Hong Kong is a special administrative region of the People's Republic of China (PRC). It is located on the Chinese south coast, enclosed by the Pearl River Delta and South China Sea. Hong Kong's territory covers an area of 1,104 km<sup>2</sup> which consists of Hong Kong Island, the Kowloon peninsular, the New Territories and over 200 offshore islands including Lantau, the biggest one (Census and Statistics Department, Geography and Climate, 2011).

After the First Opium War (1840-1842) with the Treaty of Nanjing, Hong Kong island became a colony of the British Empire. After China's defeat in the Second Opium War (1856-1860), the Convention of Beijing ceded the Kowloon Peninsula and Stonecutter's island in perpetuity to Britain. In 1898 under the terms of the Convention for the Extension of the Hong Kong Territory, Britain obtained a 99-year lease of Lantau island and the northern lands known lately as the New Territories. This territory has remained unchanged to the present (Fairbank, 1980; China Spree, 2012).



During the first half of the 20<sup>th</sup> century the population of Hong Kong increased drastically. In 1841 there were 7,450 Chinese residents, while in 1870 there were 115,000 Chinese and 8,754 Europeans. An education system based on the British model was introduced but the local Chinese population and the wealthy European community had little contact (Pomerantz-Zhang, 1992).

In the 1950's Hong Kong experienced rapid industrialization characterized by textile exports and other manufacturing industries. The growth of the population and the low cost workforce resulted in the rising of living standards to which the government responded with a public housing estate programme (China Spree, 2012).

After China's Opening Up and Reform Policy in 1978, trade in Hong Kong increased even more dramatically and the economic link between Hong Kong and China became stronger and tighter. When Shenzhen became a Special Economic Zone (1980) of the PRC, Hong Kong became the main source of foreign investment in China. The manufacturing industry of Hong Kong declined with the rise of manufacturing in southern China; while the service industry experienced high rates of growth both in the 1980s and the 1990s, thanks to workers released from the manufacturing industries (China Spree, 2012).

### 1.1.2 Political System

The primary pillars of government are the Executive Council, the civil service, the Legislative Council and the judiciary. Though it has a multi-party system, the head of the government – the Chief Executive of Hong Kong – is chosen by an election committee composed of 400 to 1,200 members. The Chief Executive is then appointed by the Central People's Government.

## 1.2 The Economic System of Hong Kong

### 1.2.1 Economic Policy

Hong Kong is today a leading manufacturing complex and commercial centre in Asia. Its policy of free enterprise and free trade, the rule of law, a well-educated and industrious workforce and a sophisticated commercial infrastructure together with the opening of the Chinese market during the last decade have strengthened Hong Kong as an international services and trade hub. The Government of the HKSAR adopts a free market policy.

The Trade and Industry Department is in charge of conducting international trade relations, putting into action trade policies and agreements, and supporting on a general basis industries and small and medium enterprises (SMEs). The Hong Kong Trade Development Council (HKTDC) serves as a platform for doing business with mainland China and Asia (Trade and Industry Department, The facts, 2012).

### 1.2.2 Economic Sectors

In terms of trade, by June 2012 domestic exports of goods reached HKD4,978 million, re-export of goods was HKD273,249 million, for a total of HKD278,227 million. By the same period, imports of goods were HKD322,932 million. (Census and Statistics Department, 2012).



In 2010, manufacturing accounted for 1.8 per cent of GDP (Gross Domestic Product) while employment in manufacturing was 3.4 per cent of total employment. Hong Kong's manufacturing enterprises are mainly SMEs linked to large factories through an efficient and flexible subcontracting network that allow them to respond swiftly to changes in external demand (Trade and Industry Department, The facts, 2012).

The services sector was 92.9 per cent of GDP in 2010 with a total value of trade in services of HKD1,222 billion. In the same year, Hong Kong exported HKD826.9 billion worth of services – a ratio of 47.4 per cent to Hong Kong's GDP – while, at the same time, it constituted a share of 88.4 per cent of total employment. (Trade and Industry Department, The facts, 2012).

## 1.3 Social Profile

### 1.3.1 Demographics

Hong Kong is one of the most densely populated cities in the world, covering a land area of 1,104 km<sup>2</sup> with a population of 7,071,600 in 2011. According to the Census and Statistics Department of Hong Kong (Annual Digest 2012), of the total population, 6.86 million were Usual Residents and 0.21 million Mobile Residents.

Population data, during the period 2006 to 2011, are summarized in Table 1:

*Table 1: Population by Number and by Sex*

Year	Mid-year Population	Annual Rate of Increase	Sex Ratio (males per 1000 females)
2006	6,857,100	0.6	912
2007	6,916,300	0.9	904
2008	6,957,800	0.6	897
2009	6,972,800	0.2	891
2010	7,024,200	0.7	883
2011	7,071,600	0.7	876

Source: Census and Statistics Department, Annual Digest 2012.<sup>1</sup>

The influx of immigrants from mainland China, approximating 45,000 per year, is a significant contributor to its population growth. Residents from mainland China do not have the right of residence in Hong Kong, nor are they allowed to enter the territory freely but still a daily quota of 150 mainland Chinese with family ties in Hong Kong are granted a "one way permit."

The birth rate remains low (13.5 live births per 1,000 population in 2011 to 9.5 in 2006). Moreover, according to the total fertility rate, 1,000 women in 2011 would bear, on average, 1,204 children in their lifetime as compared with 984 children in 2006. In 2011, the death rate was 6.0 per 1,000 population. The expectation of life at birth in 2011 was 80.3 years for males and 86.7 years for females compared with 79.4 and 85.5 years in 2006 (Census and Statistics Department, *Annual Digest*, 2012).

<sup>1</sup> The Population Census conducted from June to August 2011 provided a benchmark for revising the population figures compiled since the 2006 Population By-census. In the above table, population-related figures from 2007 to 2010 have been revised accordingly.



### 1.3.2 Gender Ratio

At mid-2011, there were 881 males per 1,000 females. The median age of the total population was 41.1. The age and sex structure of the population is summarized in Table 2:

Table 2: Population by Age and Sex Structure 2011

Age Group	Male		Female		Total	
	Number	%	Number	%	Number	%
0-14	426,200	6.3	397,300	5.9	823,500	12.1
15-24	439,000	6.3	436,200	6.3	875,200	12.6
25-34	455,300	6.4	629,900	8.9	1,085,200	15.4
35-44	492,300	7.0	666,800	9.4	1,159,100	16.4
45-54	619,900	8.8	678,000	9.6	1,297,900	18.4
55-64	432,300	6.1	432,200	6.1	864,500	12.2
65 & over	422,700	6.0	489,400	6.9	912,100	12.9
<b>Total</b>	<b>3,310,500</b>	<b>46.8</b>	<b>3,310,500</b>	<b>53.2</b>	<b>7,067,800</b>	<b>100.0</b>

Source: Census and Statistics Department (2012).

### 1.3.3 Ethnic Groups and Languages

About 95 per cent of the people of Hong Kong are of Chinese descent. The remaining 5 per cent is composed by a South Asian population of Indians, Pakistanis and Nepalese; some Vietnamese refugees who became permanent residents; some South-East Asian people coming from the Philippines, Indonesia and Thailand mostly employed as foreign domestic helpers; some Europeans, mostly British citizens; then Canadians, Americans, Japanese and Koreans mostly working in the city's commercial and financial sector.

Hong Kong's official languages are Cantonese – a Chinese language originating from Guangdong province to the north of Hong Kong – and English.

After 1997 a rapidly growing number of mainlanders have settled in Hong Kong. The government maintains a policy of "mother tongue instruction" in which the medium of instruction is Cantonese, with written Chinese and English. In secondary schools, "biliterate and trilingual" proficiency is emphasized, and Mandarin-language education has been increasing. Currently 1.4 per cent of the population speak Mandarin (HKSAR Government website, 2012; China Spree, 2012).



# Chapter 2

## *Major Forces in Lifelong Learning*

### Introduction

This chapter defines a framework to investigate the main objective of this study. It gives a picture of the two most important factors that influence the development of the lifelong learning sector and its implications on employment prospects. It describes the education and employment systems, considered crucial in defining Hong Kong as a case study in the analysis of lifelong learning education and employability.

### 2.1 The Education System

#### 2.1.1 Overview

Up to 1997, education in Hong Kong used to roughly follow the British pattern. But after the handover of sovereignty to mainland China, reforms have been implemented according to different needs.

The tripartite school system (grammar, technical, and prevocational) formed in the 1950s follows exactly the British model. The secondary technical schools and secondary modern schools, introduced to Hong Kong in the 1950s and early 1960s, were transformed according to the needs of the new education reform launched after the reunification with mainland China (Lau, Kan and Wai, 2011).

The Hong Kong education system prior to the reform of the late 1990s, included six years of primary education followed by five years secondary and a further two years to the so-called A-level stage which then led on, for successful students, to university for a three-year honours degree. It was an elitist system where students who were not interested in pursuing a university degree would leave at the secondary three level, proceeding to vocational education or to the work force. At Hong Kong Certificate of Education Examination level (secondary five) the progression rate was less than 50 per cent to the A-level stage. University level – always following the British model – was open to only 18 per cent of the age group cohort by 1997. Nine years' free education was only introduced in 1979. In addition, what made the system even more selective was the language issue requiring students to be trilingual and bi-literate (Cribbin, 2011).

Hong Kong's public schools are operated by the EDB, a single government organ that co-ordinates all matters concerning education and administers more than 1,000 schools. Most comprehensive schools can be included in three categories: the rarer public schools; the more common subsidized schools, including government aid-and-grant schools; and private schools often run by Christian organizations with admissions based on academic merit rather than on financial resources. Outside this system are the schools under the Direct Subsidy Scheme and private international schools (OECD, 2010; China Spree, 2012).



Currently, there are nine public universities in Hong Kong the oldest being the University of Hong Kong (HKU) established in 1911. Competition among students to receive an offer for an undergraduate programme is severe as the annual number of intakes is limited, especially when some disciplines are not offered by all tertiary institutions. In addition there are also a number of private higher institutions which offer higher diplomas and associate degree courses for those who fail to enter a college for a degree study. For some this is a second chance of getting into a university if they have a good performance in these sub-degree courses (HKEAA website, 2012).

## 2.1.2 Educational Institutions and Funding

Tables 3 and 4 show student enrolment by level of education in the last six years; the educational and training institutions by level of courses offered; and educational attainment and government expenditure.

*Table 3: Student Enrolment by Level of Education*

Level of Education	School/Academic Year		
	2006/07	2010/2011	2011/2012
Kindergarten	140,800	150,500	159,000
Primary	414,500	334,400	326,200
Secondary	510,300	486,800	487,000
Postsecondary	218,400	303,800	296,800

Source: the EDB website, 2012.

*Table 4: Educational/Training Institutions by Level of Education of Courses Offered*

Level of Education	School/Academic Year		
	2006/07	2010/2011	2011/2012
Kindergarten	1,015	985	980
Primary	726	629	625
Secondary	33	32	35
Postsecondary	12	13	15

Table 5 shows how the education level of the population has improved appreciably over the past five years, and compares the educational attainment of the population aged 15 and over for 2006, 2010 and 2011. Table 6 illustrates public expenditure on the school system in Hong Kong.



Table 5: Educational Attainment of the Population Aged 15 and over

Education attainment	% Population aged 15 and over		
	2006	2010	2011
No schooling/Pre-primary	5.9	5.4	5.1
Primary	18.6	17.0	16.2
Secondary*	51.7	52.3	51.8
Post-secondary	23.8	25.4	19.6
Total	100.0	100.0	100.0

Note: \* Persons with educational attainment at secondary level refer to those with Secondary 1 to Secondary 7 education or equivalent level.

Source: EDB website, 2012.

Table 6: Government Expenditure on Education

Education attainment	Financial Year (April-March)		
	2006	2010	2011
Total expenditures (HKD million)	51,934	60,719	68,274
Recurrent expenditure under General Revenue Account (HKD million)	44,602	51,034	56,052

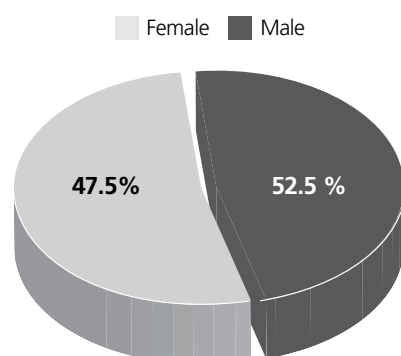
Source: EDB website, 2012.

## 2.2 Labour and Employment

### 2.2.1 Employment

According to the Hong Kong Annual Digest of Statistics 2012, the population of HKSAR at mid 2011 was 7,071,600, with a labour force of 3,703,100, of whom 1,942,700 are male (52.5 per cent) and 1,760,400 females (47.5 per cent).

Figure 1: Gender Ratio in Labour Force (2011)



Source: Census and statistic Department, Annual Digest 2012.

Referring to data on unemployment and unemployment rates, in 2011 the overall number of unemployed was 126,700 with an unemployment rate of 3.4 per cent; of those, 77,500 are male (4.0 per cent) while 49,200 are female (2.8 per cent).

*Table 7: Labour Force and Its Participation Rates by Age and Sex Groups (2011)*

Age	Male labour force		Female labour force		Both sexes total	
	Number	Ratio %	Number	Ratio %	Number	Ratio %
15-19	21,300	9.9	18,800	9.1	40,100	9.5
20-24	134,600	61.1	142,500	62.1	277,100	61.6
25-29	213,900	93.9	265,900	87.5	479,900	90.2
30-34	215,700	96.3	259,000	80.1	474,700	86.7
35-39	225,000	96.7	240,700	73.5	465,700	83.1
40-44	230,800	95.8	236,100	71.7	466,800	81.9
45-49	277,900	94.6	242,800	68.3	520,700	80.2
50-54	281,000	90.4	189,900	58.7	470,900	74.2
55-59	197,100	78.1	110,400	42.8	307,500	60.2
60-64	101,700	50.0	43,400	21.3	145,000	35.7
≥ 65	43,700	10.5	10,900	2.3	54,600	6.2
<b>Overall</b>	<b>1,942,700</b>	<b>68.4</b>	<b>1,760,400</b>	<b>53</b>	<b>3,703,100</b>	<b>60.1</b>

Source: The Census and Statistics Department Annual Digest, 2012, p. 23.

*Table 8: Unemployment and Underemployment by Age and Sex (2011)*

Age	Unemployment		Underemployment	
	Number	Ratio %	Number	Ratio %
15-19	6,400	15.8	1,500	3.8
20-24	23,200	8.4	5,400	1.9
25-29	16,800	3.5	4,400	0.9
30-34	11,900	2.5	4,500	0.9
35-39	12,000	2.6	5,600	1.2
40-44	13,400	2.9	8,000	1.7
45-49	13,700	2.6	9,500	1.8
50-54	15,600	3.3	12,100	2.6
55-59	9,800	3.2	7,600	2.5
≥60	4,000	2.0	4,600	2.3

Age	Unemployment		Underemployment	
	Number	Ratio %	Number	Ratio %
Sex				
Male	77,500	4.0	43,900	2.3
Female	49,200	2.8	19,400	1.1
<b>Overall</b>	<b>126,700</b>	<b>3.4</b>	<b>63,300</b>	<b>1.7</b>

Source: The Census and Statistics Department Annual Digest, 2012, p. 24.

Table 9 shows the occupations of the labour force in 2011 with the majority being associate professionals, followed by elementary occupations and services and sales workers respectively, while plant workers are the least.

*Table 9: Employed Persons by Occupation (2011)*

Occupations	Persons
Managers and administrators	382,500
Professionals	245,400
Associate professionals	711,200
Clerical support workers	504,700
Services and sales workers	594,100
Craft and related workers	249,400
Plant and machine operators and assemblers	180,800
Elementary occupations	703,900
Others occupations	4,400
<b>Total</b>	<b>3,576,400</b>

Source: The Census and Statistics Department Annual Digest, 2012, p. 25.

By comparing occupation with that of the previous year (2010) when the majority were elementary workers followed by associate professionals and clerks, we can recognize a slight movement of the workforce from the service industries into the knowledge-economy and globalized industries in Hong Kong (Census and Statistics Department, Annual Digest 2011).

Table 10 and table 11 show employed persons by industry over 10 years. Both are based on the Hong Kong Standard Industrial Classification (HSIC), but table 10 is based on the HSIC version 1.1 and table 11 on the HSIC version 2.0. Although the data in both tables are not directly compatible, they do illustrate the move of employees from service industries into the knowledge-economy and globalized industries in the last decade.

Table 10: Employed Persons by Industry-Based on HSIC Version 1.1 (2011)

Industry	2000	2005	2006	2007
Manufacturing	333,700	224,300	216,900	200,000
Construction	301,700	263,700	269,200	274,800
Wholesale, retail and import/export trades, restaurant	981,700	1,093,800	1,104,800	1,142,000
Transport, storage and communications	356,600	357,300	369,200	371,900
Financing, insurance, real estate and business services	452,700	503,300	525,700	546,400
Community, social and personal services	754,700	870,200	892,100	920,200
Other	26,200	24,100	22,900	21,700
<b>Total</b>	<b>3,207,300</b>	<b>3,336,600</b>	<b>3,400,800</b>	<b>3,476,900</b>

Table 11: Employed Persons by Industry-Based on HSIC Version 2.0 (2011)

Industry	2000	2005	2006	2007
Manufacturing	165,700	150,000	132,800	132,900
Construction	265,300	262,400	264,900	277,000
Import/export trade and wholesale	588,900	562,200	547,000	538,800
Retail, accommodation and food services	551,800	544,700	557,900	577,900
Transportation, storage, postal and courier services, information and communications	433,800	423,400	422,100	434,200
Financing, insurance, real estate and business services	638,800	636,600	641,400	676,000
Public administration, social and personal services	843,300	867,000	884,600	915,400
Other	21,500	21,400	23,400	24,100
<b>Total</b>	<b>3,509,100</b>	<b>3,467,600</b>	<b>3,471,100</b>	<b>3,576,400</b>

## 2.2.2 General Employment System

The Labour Department is the principal agency in the HKSAR Government responsible for the execution and co-ordination of major labour administration functions. According to its mission (Labour Department website, 2012), the department has four key areas of work:

1. Employment Services, to improve the utilization of human resources by providing a range of employment services to meet changes and needs in the labour market;
2. Safety and Health at Work, to ensure that risks to people's safety and health at work are properly managed by legislation, education and promotion;



3. Labour Relations, to foster harmonious labour relations through promotion of good employment practices and resolution of labour disputes;
4. Employees' Rights and Benefits, to improve and safeguard employees' rights and benefits in an equitable manner" (Labour Department website, 2012).

As for labour legislation and labour contracts, workers and employers' duties and rights are regulated by the Employment Ordinance. Since its enactment in 1968, the benefits under the ordinance have been significantly improved. Those currently include an extensive range of employment protection and benefits for employees such as: wage protection, rest days, holidays with pay, paid annual leave, sickness allowance, maternity protection, severance payment, long service payment, employment protection, termination of employment contract and protection against anti-union discrimination (Labour Department, Employment Ordinance, 2012).

The Labour Department (*Annual Report, 2010*) also follows a specific programme for the improvement of employment services. It provides a full-range and free employment services to help job seekers find suitable jobs and employers fill their vacancies. The two principal legislation administered by this programme area are the Employment Agency Regulations made under the Employment Ordinance – which regulate the operation of employment agencies in Hong Kong through a licensing system, inspection, investigation and prosecution; and the Contracts for Employment Outside Hong Kong Ordinance which protects the interests of local manual workers and those non-manual employees with low monthly wages, recruited by employers outside Hong Kong to work in other territories.

Employment services include a wide range of activities offered by job centres where telephone and online services are available. To facilitate job-seekers, the employment service system has linked a vacancy database with non-governmental organizations. Employers can send their vacancy information to the Job Vacancy Processing Centre, which will then upload information onto the website. Special recruitment and promotional activities – such as job info days and job fairs, organized both on large and smaller scales – are held to facilitate job-seekers and employers to meet and communicate directly. In 2010 the Labour Department posted a total of 752,323 vacancies from the private sector, about 27.6 per cent more than 2009 (Labour Department *Annual Report, 2010*).

### 2.2.3 Specific Employment Supporting Services

Specific employment supporting services have been developed to match the need of unemployed people in general and special categories of people, such as young people at their first employment or with low educational achievements or weak motivation, fresh graduates, middle-aged people or people with disabilities (Labour Department, *Annual Report, 2010*).

The Labour Department operates two youth employment resource centres named Youth Employment Start, which provide services on employment and self-employment to young people (aged 15-29) to help them to map out their career path and enhance their employability. In terms of programmes, in September 2009, a Youth Pre-employment Training Programme and a Youth Work Experience and Training Scheme were launched to provide comprehensive youth training and employment support to young school leavers (aged 15 to 24) at sub-degree level or below. Apart from these employment projects, in July 2010 the Labour Department launched a Special Programme for Youths (aged 15 to 24) with Acute Employment Difficulties due to low educational attainment, emotional/behavioural problems or learning difficulties (Labour Department, *Annual Report, 2010*).

From August 2009 to the end of 2010 a special and time-limited initiative was launched by the Labour Department for fresh graduate students named the Internship Programme for University Graduates (GIP) which encouraged enterprises to offer internship and employment opportunities for university graduates of 2008 and 2009. Graduates received training in their capacity as employees and their salaries were proportionate with their duties and responsibilities; while employers receive a training subsidy directly from the government. GIP also provided for the first time internship opportunities in the mainland to give graduates the possibility to acquire direct knowledge of the operation of mainland enterprises and economy. The great improvement in the labour market situation and the consequent increase of job openings for graduates represent the reasons why GIP ceased accepting internship positions and applications by the end of March 2010 (Labour Department, *Annual Report*, 2010).

To sustain employment and to support the unemployed in general, a two-year pilot Employment Navigator Programme (ENP) was launched by the Labour Department in December 2010. The programme aims at providing the unemployed with in-depth and personalized employment consultation, giving a cash incentive to each of the unemployed who stays in employment after receiving the consultation service. Further, since 2005, a programme called Work Trial Scheme was launched to enhance the employability of job-seekers who have special difficulties in finding jobs. It consists of a one-month work-trial without employer-employee relationship during which participants accept job offers made by participating organizations, plus a one-off payment allowance after the trial completion. Another initiative was launched in June 2007, called the Transport Support Scheme, designed to provide time-limited allowances as incentives for needy job-seekers and low-income employees located in the four remote districts of Yuen Long, Tuen Mun, the North and Islands (Labour Department, *Annual Report*, 2010).

A specific employment programme for the middle-aged was launched in May 2003 in order to support the unemployed aged forty and above in finding and securing a job. Since its enhancements in June 2009, a training allowance for a certain period of time has been given by the government directly to those employers who engage eligible middle-aged job-seekers in a full-time permanent job. Thanks to the programme, by the end of 2010, 50,448 placements were secured. Further, for workers affected by large-scale retrenchment, the Labour Department has a priority channel for enquiries and special counters at job centres to provide job matching services (Labour Department, *Annual Report*, 2010).

Finally, the Selective Placement Division offers employment assistance to job-seekers with disabilities. Since April 2005 the Labour Department launched the so called Work Orientation and Placement Scheme to enhance the employability of persons with disabilities. It offers pre-employment training to job-seekers as well as financial incentives to the participating employers. In June 2009, the programme was further improved by increasing the financial incentives to employers and extending the training period for job-seekers. At the end of 2010, the scheme achieved 2,249 work placements (Labour Department, *Annual Report*, 2010).

## 2.2.4 Income and Gender Issues

As reported by Oxfam (2012), Hong Kong has been classified as a high income economy. The distribution of domestic households in Hong Kong by monthly household income is as follows:

Table 12: Domestic Households in Hong Kong by Monthly Household Income (2011)

Monthly Household Income (\$)	thousands	Monthly Household Income (\$)	thousands
Under 4,000	171.3	30,000-34,999	158.4
4,000-5,999	121.7	35,000-39,999	103.7
6,000-7,999	138.4	40,000-44,999	90.1
8,000-9,999	144.9	45,000-49,999	63.9
10,000-14,999	328.5	50,000-59,999	102.6
15,000-19,999	274.5	60,000-79,999	105.4
20,000-24,999	246.3	80,000-99,999	48.1
25,000-29,999	174.8	100,000 and over	86.6
		<b>Total</b>	<b>2359.3</b>
		<b>Median monthly household income</b>	<b>\$20,000</b>

Source: The Census and Statistics Department Annual Digest, 2012, p. 51.

Following the Oxfam report (2012), the Human Development Report released by the United Nations Development Programme (UNDP) in 2009 reported that the income gap between rich and poor in Hong Kong is the widest among the world's wealthy economies. The report showed that Hong Kong has a Gini Coefficient of 43.4, the highest among developed economies, followed by Singapore at 42.5, the United States at 40.8 and Israel at 39.2.

Between 2005 and 2009, Hong Kong's per capita GDP, grew from HKD211,405 to HKD232,599; but the number of people living in poor households where at least one family member was employed also increased from 595,600 to 650,100. By mid-2010 the number rose to 660,700, the highest ever. Moreover, the ratio of the monthly median income of the richest 10 per cent of households to that of the poorest 10 per cent was 27:1. The Oxfam report (2012) shows that of all households with at least one employed person, 10.2 per cent, or 192,500 households, had an income of less than half the median income of all such households by mid-2012. Between 2005 and mid-2010, the number of households with an income below this marker increased by 12 per cent.

This shows the necessity of further income protection for poor families in addition to the minimum wage. Although the government has taken some steps to address the situation such as setting a minimum wage, a Comprehensive Social Security Assistance (CSSA) programme, transport support scheme, various child care support programmes and short-term food assistance, these measures appear far from adequate (Oxfam, 2012)



## 2.2.5 Gender Issues on Employment

The article 25 of the Basic Law provides that all Hong Kong residents shall be equal before the law. Further, article 1 of the Bill of Rights provides that the rights recognized in the bill shall be enjoyed without distinction of any kind, including sex. Hong Kong has also enacted a Sex Discrimination Ordinance that prohibits discrimination on the grounds of sex, marital status or pregnancy. This prohibits both direct and indirect discrimination. The Convention on the Elimination of all Forms of Discrimination against Women was extended to Hong Kong, at the consent of the People's Republic of China and the United Kingdom of Great Britain and North Ireland in 1996 (SIGI, 2012). In 2011, the Human Development Index for Hong Kong was 0.898, placing the city at 13 out of 187 countries. There is no Gender Equality Index for Hong Kong (UNDP, 2012).

Despite the introduction of measures to improve the status of women, gender equality in Hong Kong is stalled by the persistence of gender stereotypes which prescribe rigid roles of women and men in the private and public sphere. Research conducted by The Women's Foundation in Hong Kong has found that the advancement of women is being impeded by prejudiced misconceptions on the roles, values, images and abilities of women and men. This includes the widely held view that women and girls do not have the same abilities as men and boys or that women do not have the same leadership capacity as men. Accordingly, women in Hong Kong are over-represented in lower income sectors and casual labour. Further, the gender gap in pay has increased in recent years and women are more vulnerable to poverty (TWF, 2008).

### 1) Educational Achievement

According to the World Bank (2012) and the HKSAR Census Statistics Department, Women and Men in Hong Kong Key Statistics (2011), women were 50.5 per cent of all those enrolled in tertiary programmes in Hong Kong. The ratio of female to male tertiary enrolment in 2010 was 104 per cent. Business and commercial studies was the most popular field of tertiary education for both women and men. Women make up 47.2 per cent of MBA students in Hong Kong. This is higher than the world average of 31.6 per cent (Catalyst, 2012).

*Table 13: Population Aged 15 and over (excluding foreign domestic helpers) by Educational Attainment, Sex and Sex Ratio (2011)*

<b>Educational Attainment</b>	<b>Sex</b>	<b>Number</b>	<b>Sex Ratio (No. of males per 1000 females)</b>
No schooling/ Pre-primary	F	235,000	321
	M	75,600	
Primary	F	542,000	785
	M	425,600	
Lower secondary	F	435,500	1,091
	M	475,200	

<b>Educational Attainment</b>	<b>Sex</b>	<b>Number</b>	<b>Sex Ratio (No. of males per 1000 females)</b>
Upper secondary	F	1,079,400	946
	M	1,021,600	
Post-secondary (Non-degree)	F	223,600	1,021
	M	228,300	
Post-secondary (Degree)	F	560,000	1,090
	M	610,300	
Overall	F	3,075,600	922
		2,826,600	
	<b>Total</b>	<b>5,912,100</b>	

Source: Census and Statistics Department Women and Men, 2012, p. 62.

## 2) Occupation

In 2010, women's median monthly employment earning was HKD9,000 while men earned HKD12,000. Compared to women, a higher percentage of men worked in occupations with higher monthly earnings such as managers, administrators, professionals and associate professionals (Catalyst, 2012).

Table 14: Employed Persons by Occupation and Sex (2011)

<b>Occupations</b>	<b>Gender</b>	<b>Persons</b>
Managers and administrators	F	123,200
	M	259,300
Professionals	F	99,200
	M	146,300
Associate professionals	F	311,000
	M	400,100
Clerical support workers	F	367,300
	M	137,400
Services and sales workers	F	333,600
	M	260,600
Craft and related workers	F	10,600
	M	238,800
Plant and machine operators and assemblers	F	8,600
	M	172,200
Elementary occupations	F	456,600
	M	247,400

Occupations	Gender	Persons
Others occupations	F	1,200
	M	3,200
Overall	F	1,711,200
	M	1,865,200
<b>Total</b>		<b>3,576,400</b>

### 3) Women on Boards

According to Banerji and Vernon (2012), in 2012, women held 9.0 per cent (57) of the 634 directorship positions on the corporate boards of Hong Kong's top companies, as listed on the Hang Seng Index (HSI). This number has only increased by 1 per cent since 2009. Compared to other countries, the Hong Kong percentage appears low, but is actually higher than other Asian countries, such India (5.3 per cent in 2010), Singapore (6.9 per cent in 2011), Malaysia (7.8 per cent in 2011) and mainland China (8.1 per cent in 2011). However, Hong Kong still lags behind other countries in 2011 – like Australia (10.9 per cent), UK (15 per cent), USA (16.1 per cent) and most notably, Norway (40.1 per cent). In 2009, the average age of women holding board positions was 57.3 years old, compared to 59.9 years old for male board directors (Banerji and Vernon, 2012; Catalyst, 2012).

Table 15: Women's Representation on Boards (HSI Companies) (2012)

Representation of Women	%	Representation of Women	%
Total directorships held by women	9.0%	Companies with at least one woman director	58.3%
Women executive directorships	6.7%	Companies with multiple women directors	33.3%
Women non-executive directorships	10.2%	Companies with no women directors	41.7%
Companies with women executive directors	25.0%		



## PART TWO

# The Development of the Lifelong Learning Sector in Hong Kong

## Chapter 3

### *Lifelong Learning Policies and Implementation*

## Introduction

This section is mainly related to the analysis of Hong Kong's policies and their implementation in the lifelong learning sector. It has been conducted through a critical review of laws and regulations and official speeches at ministerial level. The first two parts give a picture of the main characteristics related to the learning sector, and explore the political discourse behind lifelong learning policies, as well as implementation strategies. The final part is an initial evaluation of the adopted policies.

## 3.1 The Development of Lifelong Learning Policies in Hong Kong

### 3.1.1 The Infrastructure of Lifelong Learning

Lifelong learning in Asia follows various patterns according to the backgrounds and contexts of the different Asian countries. Various terminologies have been used in the region in relation to lifelong learning, revealing how the history of adult and continuing education in the region follow different scenarios. As suggested by Han (2007), three groups can be defined by their common roots. The first one is related to the East Asian countries Republic of Korea, Japan and China which have a common cultural heritage and have adopted a common terminology, *social education*, sharing a background of community education.

The second group of countries refers to Hong Kong, Singapore and Malaysia which have shared a British colonial heritage. These countries adopted the term adult education in relation to adult basic education, technical training, as well as all forms of education up to higher education. The third group refers to South-East Asia countries such as Thailand, the Philippines, Viet Nam and so on, which have used the term *non-formal education* under the heavy influence of UNESCO's Education for All (EFA) project.

Hong Kong represents a unique case in the analysis of the development of lifelong learning education being the last British colony in the Far East and the first Special Administrative Region of the People's Republic of China.

The colonial experience undoubtedly influenced the education system in Hong Kong, which was modelled closely on the British system. As a consequence, the lifelong learning sector has its roots in university extracurricular departments established in Hong Kong from the 1950s which aimed at adult, continuing and professional education. In 1956 the University of Hong Kong established its Department of Extra-mural Studies, predecessor of the School of Professional and Continuing Education (HKU SPACE) founded in 1992. In 1963, the Caritas Adult and Higher Education Service was established while in 1965, the Chinese University of Hong Kong established its Department of Extra-mural Studies, predecessor of the School of Continuing Studies (CUHK SCS). In 1975, Hong Kong Baptist College established its Department of Extra-mural Studies too, predecessor of the School of Continuing education (SCE, HKBU). In 1982, the Vocational training Council (VTC) was founded followed in 1989 by the Open Learning Institute of Hong Kong (OLI), predecessor of the Open University of Hong Kong (OUHK). In 1991, the Hong Kong City Polytechnic established its Centre for Continuing Education, predecessor of the School of Continuing and Professional Education, City University of Hong Kong (CityU SCOPE); and in 1992 the Open Learning Institute of Hong Kong (OLI) established its Centre of Continuing and Community Education, predecessor of the Li Ka Shing Institute of Professional and Continuing Education (OUHK LiPACE). In 1999, the Hong Kong Polytechnic University established its School of Professional Education and Executive Development (PolyU SPEED). These are the main institutions that sustain the lifelong learning system in Hong Kong (HKU SPACE, 2012).

According to the definition given by HKU SPACE (2012),

*The basic components of the Hong Kong lifelong learning system consist of two interconnected sub-systems, conventional education and continuing education. These two sub-systems are integrated under a common qualifications framework. On top of the universal and compulsory primary and secondary education system, continuing education runs parallel to and fully articulated with formal education in offering both award and non-award bearing programmes. This system provides learners a flexible and multi-level education pathway with multiple entry and exit points. Continuing education is the mainstream of the lifelong education system in Hong Kong (HKU SPACE website, 2012).*

Among the major lifelong learning education actors are the Education Commission (EC) as the advisory body; the Education Bureau (EDB) and the Labour and Welfare Bureau (LWB) for policy-making and implementation; the Vocational Training Council (VTC) and the Employees Retraining Board (ERB) for advising, policy-making and implementation of technical education and vocational training; the University Grants Committee (UGC) as the advisory and implementation body for higher education; the Federation of Continuing Education in Tertiary Institutions (FCE) for implementation; and the Advisory Committee on Teacher Education and Qualifications (ACTEQ) as an advisory and implementing body for higher education.

### 3.1.2 Pressures behind Government Initiatives for Lifelong Learning

Three main factors can be underlined that contributed to the improvement of the Hong Kong education system and the lifelong learning sector: (1) the globalization process and the emergence of a new world economic structure; (2) the Asian financial crisis at the end of the nineteen nineties which underlined the fragility of Asian economies; (3) the reunification of Hong Kong with mainland China.

As Hong Kong is rapidly transforming itself into a knowledge-based society, the discourse on lifelong learning has been embraced by the general public as a necessary part of life (EC, 2000a).

The importance given to lifelong learning has been underlined consistently by the EDB and the EC on many occasions. The first can be dated back to January 1999 when the EC indicated its intention to carry out a comprehensive review of the Hong Kong education system. The system needed to be adapted to economic, political, social and cultural developments related to globalization, to the strong impact of information technology on education and to reunification with the motherland (EC, 1999a, pp. 3-10; Kennedy 2004). The strength of the lifelong learning system became the principal objective of the new education reform, central to its vision, aims and direction. Although the EC only began to use the term lifelong learning in January 1999, by September of the same year it was proclaiming that “the age of lifelong learning has dawned. Learning is no longer the prerogative of those aged 6 to 22” (EC, 1999b).

As Kennedy (2004) underlined, a central issue on the discourse about the economic globalization narrative is that nations must compete with low-wage economies on price or add value, which refers to innovation, service, and creativity. Therefore, to be competitive in the knowledge-based economy, high level skills are required and must be continuously updated through lifelong learning.<sup>2</sup> Following this discourse, globalization is seen as “a non-negotiable exogenous economic constraint” (Watson and Hay, 2003).

Looking at Hong Kong policies, those concepts on the knowledge economy and its relation to lifelong learning together with the discourse on the inevitability of globalization are continuously emphasized. For example, during the annual policy speeches of the Hong Kong Chief Executive, Tung Chee Hwa asserted: “In the face of globalization HK must become an innovative knowledge-based economy and through training and retraining programmes, the government helps citizens adjust to the demands of economic restructuring” (Tung 2003; Kennedy 2004). Further, as the *Progress Report on Education Reform* in 2006 states: “The 21st Century sees us facing substantial changes in the economic structure within a globalized world. To meet the challenges posed by these unprecedented changes, education systems and measures must progress in tandem to sustain the development of Hong Kong”. Moreover, quoting the Secretary for Education and Manpower Arthur K.C. Li’s words in the foreword of the same document, he said: “In this changing world, our younger generation needs to be equipped with a broad based knowledge, high adaptability, independent thinking and the ability for lifelong learning” (EC 2006).

As mentioned in the document *Learning for Life and Learning through Life: Reform Proposals for the Education System in Hong Kong* (EC, 2000b), continuing education performs multiple functions as below:

1. “It gives full play to one’s potentials and enhances the quality of the individual.
2. It enables learners to acquire up-to-date knowledge and skills to stay competitive in the rapidly changing and increasingly globalized economy.
3. It allows learners to acquire qualifications in academic, professional or vocational training, which meet their personal aspirations and occupational needs.”

The approach of the Hong Kong Government in lifelong learning policy seems to refer mainly to human capital theory which views investment in education as a key instrument to increase earnings by enlarging the capability or productivity of individuals. Therefore, behind investment in education, a central role has

<sup>2</sup> Taking Kennedy’s references, this discourse can be found in OECD documents, as well as in recent education policy documents in UK, Canada and Australia where the role of continuing education in the knowledge economy stays as a central concept (OECD 1996: 1.13). See Kennedy, 2004, p. 593.

been given by the Hong Kong Government to the economic needs related to globalization (Lo, 2010). Apart from the economic and political reasons, education reforms in Hong Kong after 1997 could also be motivated by social reasons such as equity and mobility. In the analysis of Hong Kong's education reform, Poon and Wong (2008) described a "through-road model" as a means to promoting equality and equity in education, in a wider social and economic context. Following their discourse, many of the reforms adopted in these years are aiming to provide a "through-road" for students to move more easily from one stage of education to another by removing certain blocks created by public examinations. They refer to the emerging of a more flexible admissions system together with the introduction of a new type of elite school called "Direct Subsidy Schools" which serve to mitigate the longstanding influence and status of the traditional elite schools, established during the colonial British period before 1997 (EC, 2000a; Tam, 2012).

### 3.1.3 Transforming Hong Kong into an Education Hub

Since 2004, the Hong Kong Government has sought to build a regional education hub and develop an education industry. This idea has been stressed many times by the government while policy strategies seek to build the so called Asia's World City, making it a gateway to China and a place where East and West meet (Lai and Maclean, 2011; Mok and Yu, 2011).

In 2009, the Chief Executive, Donald Tsang, followed by the Task Force on Economy's Challenges (TFEC) announced that a strong effort will be put on those economic areas where Hong Kong benefits from clear advantages, including education services. He declared that thanks to a strong investment in tertiary education, research funding and academic facilities and an increasing demand for local tertiary education by mainland students, the education industry in Hong Kong can be developed (Cribbin, 2011).

Up to 2009, the goal of attracting foreign and mainland human resources and talents as a way to facilitate the inflow of human capital into Hong Kong had been a goal of a feasible and self-sustaining education industry. As Lai and Maclean (2011) underline, developing Hong Kong into an education hub could represent an interest to pursue or be seen to revitalize its higher education system to better serve the local economy, already under pressure to transform into a knowledge-based economy and to develop new growth poles (Cribbin, 2010).

## 3.2 Lifelong Policies and Implementation

### 3.2.1 Lifelong Learning Policies

In September 1999, the EC published the consultation document entitled Review of Education System – Framework for Education Reform: Learning for Life. In 2000, the EC recommended reforming the education system, in order to pave the way for lifelong learning and all-round development. The first policy document was adopted in May, entitled Excel and Grow: Review of Education System: Reform Proposal (EC, 2000a). In September of the same year a reform proposal entitled Learning for Life and Learning through Life: Reform Proposals for the Education System in Hong Kong was published (EC, 2000b). The scope of the proposed reform is comprehensive. It consisted of seven key areas, including academic structure (as the number of years in primary and secondary schools and university), the examination and assessment systems, the school places allocation system, the curriculum, the university admission system, the provision of lifelong learning at senior secondary level and beyond, and teacher training and qualifications (EC, 2000b).



Referring to lifelong learning, the major emphasis is put on the improvement of the continuing education system. As indicated in a survey conducted by the government in the year before, a total of more than 12,000 continuing education courses were offered by various institutions between June 1999 and May 2000, and more than 550,000 students were enrolled. As the document states “the development of continuing education is mainly market-oriented, its mode of operation is flexible and diversified; the design of the courses is mainly oriented towards learners’ demands; and the courses offered are wide ranging, covering academic, professional and vocational domains as well as personal development. This aptly reflects the variety of the community’s needs for continuing education” (EC, 2000b). The directions proposed in the document (EC, 2000b) for the development of continuing education follow the pattern below:

1. Flexibility and openness/diversification. “To cater for the needs of the community for lifelong learning, the contents and mode of continuing education should be adjusted to align with changes in the society and students’ aspirations”.
2. Mechanism for quality assurance, accreditation and transfer of qualifications. It means that quality assurance and accreditation are interrelated while a comprehensive mechanism should be established whereby qualifications are mutually recognized and transferable among various continuing education / formal education / professional / vocational training programmes.
3. The document provides the guidelines for the establishment of the QF (Qualification Framework) which should embrace quality assurance, openness and diversification, portability, flexibility and transferability, and focus on learning outcome.
4. Continuing professional development in the workplace, following the idea of “work-oriented learning programme” organized jointly by employers and providers of continuing education.
5. The internationalization of continuing education with more co-operation with overseas tertiary institutions in offering specialized programmes not available in Hong Kong and to draw on their expertise.
6. The use of information technology. Local providers of continuing education should attach greater importance to the new technology for promoting lifelong learning while providing learners a stronger knowledge in information technology.
7. Resources. The document states “Continuing education should be funded on the ‘user-pays’ principle, as it helps to develop one’s potentials and enhance one’s personal qualities. However, the entire community is obliged to promote continuing education. We therefore look to people of various sectors, such as employers, professional bodies and social bodies to contribute manpower and resources. Where resources permit, the government should consider providing assistance to those learners with neither the financial means nor the abilities to pursue continuing learning and find employment, including those who have become unemployable due to the economic restructuring (such as by providing re-training opportunities) to enhance their learning abilities and employability” (EC, 2000b).

The document (EC, 2000b) underlines the importance of the community-wide efforts in promoting continuing education. First of all, the government should provide a fertile environment for the development of continuing education while co-ordinating the efforts of all interested parties (e.g. providers of continuing education, accreditation authorities, professional bodies, employers, etc.) Second, employers should encourage employees to pursue continuing learning by providing learning/training opportunities and by collaborating with providers of continuing education/professional bodies. Third, providers of continuing education are in charge of delivering to the community quality and practical programmes on current labour market needs. In addition, voluntary/community organizations are also mentioned as





those who can offer the working class information and counselling services on continuing education through an extensive community network.

Referring to accreditation authorities, the document (EC, 2000b) states that in accordance with interested parties such as providers of continuing education, the government, employers and professional bodies, they must set up a flexible mechanism for the evaluation, accreditation and transfer of academic qualifications. This serves to improve the portability and transferability of continuing education programmes of different types and levels. In addition, professional organizations will serve to encourage members to pursue further studies and provide opportunities for continuing learning, put in place a working experience accreditation mechanism and work with other relevant sectors to establish a qualifications accreditation and recognition mechanism.

Mass media are also quoted as the instrument to help promote the concept of lifelong learning by providing the public with the latest information on continuing education.

The document also paved the way for the setting up of a working group on continuing education; the establishment of a database for continuing education; and the establishment of lifelong learning centres and working out support measures for continuing education.

In December 2006, the EC issued the fourth Progress Report on the Education Reform, providing a detailed account of progress in the seven key areas of the education reform described above in the 2000 document. This report represents the last of a series of reports published in January 2002, June 2003 and December 2004. The EC submitted its report to the government in early December 2005 which accepted all the recommendations put forward by the EC. Education reform is still under way and its overall impact needs to be assessed (Cheng 2009; EC, 2006; EDB website, 2012)

### 3.2.2 Policy Implementation

After 1997, the implementation of lifelong learning policies has been enhanced with many specific priorities. The government started to invest heavily in continuing education from 2000 by promoting participation in education and training and employment with seven main initiatives to:

1. Continue the Youth Pre-employment Training Programme;
2. Arrange additional on-the-job training for trainees of the Youth Pre-employment Training Programme;
3. Increase vocational training places for Secondary 3 and Secondary 5 school leavers;
4. Increase information technology training places for people of secondary school education level;
5. Launch bridging programmes for Secondary 5 school leavers and adult learners;
6. Extend the Non-means Tested Loan Scheme; and
7. Set up a website for continuing education.

During the years 2000 to 2001, the government allocated more than HKD100 million to continue and expand the Youth Pre-employment Training Programme. The government set aside some HKD20 million to train up 1,000 information technology assistants through courses run by the Vocational Training Council (VTC) and the Employees Retraining Board. The VTC received funding to provide 1,500 additional

places for its Certificate in Vocational Studies and Foundation Diploma courses. In terms of programmes, the government joined with the FCE in launching “Project Springboard”, extended the scope of the Non-means Tested Loan Scheme and set up a website on continuing education courses available in Hong Kong (HKU SPACE website (2012) and survey 2009/2010; Lo, 2010).

In 2002, the Government allocated HKD5 billion to establish the Continuing Education Fund (CEF) which serves at encouraging a continuous enhancement of the labour force’s knowledge and skills. In this regard, the FCE played an important role by suggesting various recommendations to the government to expand the application eligibility and sector coverage of the CEF. As a matter of fact, since 2003, degree holders have become eligible to apply for CEF support and since 2004 more industrial sectors have been included in the CEF (Zhang, 2010).

In order to encourage and promote lifelong learning, in 2004 the Executive Council in Hong Kong approved the establishment of the QF, which articulates academic, vocational and continuing education and associated quality assurance mechanisms. The government also expanded the Student Financial Assistance Scheme to subsidize students pursuing self-financed sub-degree programmes offered by the continuing education sector. In support of government initiatives, the FCE recommended various financial assistance schemes to the government. The maximum amount for tax deduction for expenses for self-education was raised from HKD30,000 to HKD40,000 in 2001-02 and increased further to HKD60,000 in 2007-08 (Zhang, 2010; Poon-McBrayer, 2010).

Among policy practices adopted by the government, it is worth quoting the Manpower Supply and Demand Projection which aims at providing large-scale overall manpower projections, conducted for the first time in 1990. The main goal of the projection was to get a desirable educational mix for a projected population in five years useful for educational planning and policy decisions. Since then, this projection has become a regular practice of the government to match education and manpower needs. It has been used to implement a series of lifelong learning initiatives in the following years (Lo, 2010).

As underlined by Tam (2012) in her analysis of the professional and vocational education (PVE) system in Hong Kong, several trends are emerging and are expected to prevail and impact the sector in years and decades to come. Even though Tam (2012) refers specifically to the PVE sectors, her conclusion can be addressed to the general lifelong learning and continuing education system too. These emerging trends can be summarized as follows:

1. The increasing emphasis on education rather than occupational training in PVE;
2. The undefined demarcation between university education and vocational education;
3. The focus on learning outcomes and their assessment;
4. Increased accountability on the part of providers for the quality and standards of their offerings;
5. The rise of industry-specific qualifications frameworks through a process of accreditation;
6. The need to make learning attainments transferable across systems or sectors.

### 3.2.3 The Role of the FCE

It is important to underline that a central role in the implementation of lifelong learning policies has been played by the FCE established in 1994. FCE, with its 14 members<sup>3</sup>, plays a crucial role in Hong Kong's education and human capital development. FCE has been very active in raising community awareness of the need for lifelong learning, and in reflecting how this need can be met through the joint efforts of the government, industry, the community, and continuing education providers. Further, FCE has proactively participated in the consultation and development process of Hong Kong's education policies, advising and making recommendations to the government itself.<sup>4</sup>

The FCE contributes greatly to increase the higher education participation rate of the relevant age group (17 to 20 years old) from 30 per cent in 2000 to 53 per cent in 2004 and then to 67 per cent in 2008 to 2009. These results have been achieved thanks to the strong commitment made by the FCE member institutions to introduce the self-financing Associate Degree, Higher Diploma and equivalent level programmes. Over the years, the FCE has responded to the government's initiative to broaden the variety of opportunities for post-secondary and tertiary education (HKU SPACE website, 2012).

## 3.3 Evaluation of Lifelong Learning Policy Initiatives

Hong Kong's educational development has been keeping pace with global trends. The expansion of its primary education started in the mid-1960s in response to UNESCO's literacy campaign, followed by the expansion of secondary education in the 1970s and the 1980s, and then, the expansion of tertiary education in the 1980s and the 1990s. The current education reform, as underlined before, can be viewed as part of the reform movements that follow the globalization process and the need to build a knowledge-based economy and society.

For most policy makers not only in Hong Kong, education is seen as a major state planning apparatus serving national economic goals. This idea is closely related to the rising influence of neo-liberal beliefs according to which the most effective way to govern a state is to follow market rules. Liberal principles and rationales have been used for the organization of the western capitalist societies and their social, political and economic reproduction. This includes education serving as a major state planning apparatus. In this regard, Hong Kong represents a particularly appropriate example as it is considered the freest economy in the world. As a matter of fact, educational planning and policy decisions have been very much influenced by economic considerations, and the promotion of lifelong learning is also included in this policy strategy framework (Lo, 2010).

Lo also underlined that the rapid economic growth of Hong Kong in the past decades took place in parallel with the rapid expansion of its education system. However, there is not an obvious indication that Hong Kong's economic success is a direct result of its education system. Further, some of Lo's findings show several limitations of an education guided exclusively by economic principles. First of all, education might be too narrow even to satisfy economic needs, due to the fact that there are many other

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<sup>3</sup> The University of Hong Kong, the Hong Kong Baptist University, Hong Kong College of Technology, Caritas Adult & Higher Education Service, the Chinese University of Hong Kong, Lingnan University, the Hong Kong Polytechnic University, Vocational Training Council, City University of Hong Kong, the Open University of Hong Kong, Hong Kong Institute of Technology, the Hong Kong University of Science and Technology, the Hong Kong Institute of Education, and Po Leung Kuk (Associate member). HKU SPACE website, 2012

<sup>4</sup> For example, in 1999, the Education and Manpower Bureau (EMB) published the Education Blueprint for the 21 century: Review of academic system – aims of Education for public consultation. FCE addressed this issue through its position paper called Lifelong Learning in Hong Kong: The way forward into the 21 Century. Refer to Zhang W. (2010), p. 32.

factors, such as social capital and cultural capital contributing to economic competitiveness. Secondly, an education system concentrating too much on imparting knowledge and skills needed by employers is unlikely to serve its economic purpose due to the fact that employers themselves also require from employees qualities associated with intellectual abilities, personal attributes and moral strength. Thirdly, marketization of education may lead to erosion of teacher professionalism, which will, in the long term, undermine the quality of education.

A further consideration for the evaluation of government policy initiatives is building a regional education hub and developing an education industry. As underlined by Cribbin (2010, 2011) this policy still appears not to be fully successful. Rationales and intentions behind this move and its implications are not always clear. The education hub policy was generated from the university funding body and makes sense in the context of that sector. The permitted scale, a 20 per cent quota of funded overseas students, is not excessive in comparison to practices in other countries, while the financial incentives are not pronounced. On the other hand, the lifelong learning sector, which would be prepared to react more entrepreneurially in promoting the hub concept both onshore and offshore, has not really been taken into account by government strategies, probably due to a lower estimation of the sector. Comparing Hong Kong's hub project with its neighbours such as Singapore, Hong Kong can be seen as a latecomer which has to face strong competition to achieve its goal of asserting its brain power in the region (Cheung and Ravinder, 2003; Mok and Yu, 2011).

Although the idea of transforming Hong Kong into an education hub has been underlined and pursued with high motivation, its policy strategies and implementation in this sense could be considered ambivalent. The government approach of *laissez-faire* or positive non-intervention caused a lack of debate or consultation as well as few public resources and funding, especially at the beginning. In the face of this attitude, it can be asserted that the government's support on this policy would be better seen as exhortatory rather than concrete. However, the success of the sector in meeting government targets for the doubling of the post-secondary opportunities has made the government more aware. The introduction of the Qualifications Framework and the quality assurance mechanisms – the reformed HKCAAVQ, the Joint Quality Review Committee (JQRC), and the UGC Quality Assurance – indicates that both marketization and regulation resulted in more controls (Cribbin, 2010, 2011).

Another important element in the evaluation of policy initiatives is related to the tradition of the elitist colonial model in Hong Kong. The education system of Hong Kong is indeed highly selective and competitive. Before 1978 when the move to mass education started, access to secondary schools and universities sponsored by government aid was very limited.<sup>5</sup> After 1978 the education policy has changed and free access to compulsory school education for nine years is guaranteed to all while the provision of senior secondary places is sufficient.

Since the early 1990s, the number of degree places has increased as well: in 1990 the rate related to students admitted to university was 7 per cent while in 1995 it jumped to 18 per cent. Despite this trend, access to traditional and prestigious schools as well as popular degree programmes remains difficult. Further, public examinations such as the Hong Kong School Certificate Education Examination (HKCEE) and the Hong Kong Advanced Level Examination (HKALE), continue to play a crucial role in the selection process and therefore in the occupations success. The education system is described by the EDB as stagnant in the industrial age (EC, 1999). In the policy document adopted in 2000, the EC underlined how Hong Kong is transforming itself into an information society and, therefore, a knowledge-based

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<sup>5</sup> About half of the primary graduates could enter government-aided secondary schools, and among the rest only those who could afford higher school fees sent their children to private secondary schools. Only 2% of the age-appropriate group was admitted to university degree programmes in 1975. Poon & Wong (2008), p. 35.



economy which needs talented people “who are good learners, articulate, creative, adaptive”, critical and capable of lifelong learning (EC, 2000; Poon and Wong, 2008; Mok, 2003).

Reforms started at the end of the 1990s have addressed these issues. Initiatives have been launched to reduce examination pressure which has traditionally been used to screen students at both the school and university levels. Furthermore, educational reforms have tried to create more space for students to develop their potential by introducing fundamental changes in the academic structure, the curriculum and the assessment. The traditional elite schools began to be criticized as the cause of engendering elitism, creating inequality and inequity in issues related to school admissions and keen competition among students and between schools (Poon and Wong, 2008). For example, the first Chief Executive of the HKSAR, Tung Chee Hwa, himself criticized elite schools, underlining that Hong Kong could no longer sustain its competitive edge and transform from a service-based to a knowledge based economy if the colonial elitist education system was to continue.<sup>6</sup>

Poon and Wong (2008) argue that the elite schools have played a significant role in the transmission of knowledge and thereby accumulation of cultural capital in Hong Kong throughout their long history. In their view, thanks to public examinations and elite schools, the Hong Kong education system has been able to absorb the most brilliant students and subsequently has contributed to flourish in a climate of academic excellence. Elite schools have been able to maintain academic standards for local schools and to act at the same time as exemplary schools. Therefore, it is reasonable to let them preserve their own traditions because if elite schools are dumbed down in the name of equality and equity, the cultural capital of Hong Kong, quality of education, might be diminished.

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<sup>6</sup> Refer to the Tung Chee Hwa speeches quoted by Lo (2010), pp. 112-113.

# Chapter 4

## *Lifelong Learning Education and Key Competencies for Employment in Hong Kong*

### Introduction

This section describes the existing lifelong learning education and training system which covers learners, programmes and funding. It gives an overview on the role played by the government, education providers, the private sector and other players in the development of the lifelong learning sector. Particular attention is given to the establishment of the qualification framework as well as the definition of employability skills and competences; and how they have been categorized by the scheme of the Specific Competency Standards (SCS).

### 4.1 Key government Roles and Provisions for Lifelong Learning and Employability

#### 4.1.1 The Role of the Government and Educational Reforms for Lifelong Learning

The Hong Kong lifelong learning system consists of the interconnection of the conventional education and continuing education subsystems, which are integrated under a common qualifications framework. The two subsystems appear to be fully articulated one with the other in offering both award and non-award bearing programmes, on top of the universal and compulsory primary and secondary education system (HKU SPACE website, 2012). The lifelong learning sector has been also described by Cribbin (2011) as the “fourth estate”, after primary, secondary and tertiary education, characterized by a strong private component.

The education policy defined by Tung Chee Hwa at the end of the nineties followed a typical neo-liberal approach in promoting lifelong education. As underlined by Lo (2010), among Tung’s major lifelong-education policy measures adopted were:

1. The expansion of Non-means Tested Loan Scheme which aims at including about 80,000 students on self-financing courses in government-funded tertiary and post-secondary institutions;
2. The enlargement – to 60 per cent within 10 years – of senior secondary school leavers receiving tertiary education through the introduction of sub-degree and associate degree programmes;
3. The development of a lifelong learning ranking while analyzing the implications of establishing a qualifications framework;

4. The funding of HKD5 billion to set up a Continuing Education Fund to subsidize continuing education and training programmes;
5. The increase of second and third year places in local universities to provide further opportunities for associate degree graduates from 2005 to 2007.

The main objective of these policies is to put lifelong learning as the central theme of education reform (Tung, 1999; 2000; 2001; 2005).

As part of the radical Hong Kong education reforms for promoting success in the global knowledge-based economy, a new structure was introduced in the education system from 2009. It is specifically the so called “3+3+4” new school system which refers to secondary and higher education. In order to support this structure change, it is necessary to have a wider provision of post-secondary level vocational and educational programmes as well as an enhancement of the general system of continuing education. These changes need to be supported by the enhancement of personal development education. As the EC also recommended in 2000, future developments require the provision of “a broad senior curriculum to enable students to acquire experience in various key learning areas, construct a broad knowledge base and enhance their ability to analyse problems” (EC, 2000; Leung and McGrath, 2010).

Over the years, several educational measures were implemented to enhance economic competitiveness through education in order to ensure that the education system would deliver the expected economic objectives. Some of the most high-profile policy support measures refer to the enhancement of specific key competencies for learners and teachers, while ensuring quality assessment for education providers.

In terms of institutions, one of the major objectives of education reform is to improve quality through enhancing accountability – accountability transparency also represents one of the most important liberal education policies. This reform policy was implemented through the approval of the Education Amendment Ordinance by the Legislative Council in July 2004. As described by Lo (2010), the key elements of school-based management include several features: the development of formal procedures to set school goals and the evaluation progress; the provision of documents to delineate the schools’ profiles, which include plans and budgets as well as the evaluation of school progress; the draft of written constitutions for the school management committees; the participation of teachers, parents and alumni in school management, development, planning, evaluation and decision making; and the development of formal procedures and resources for staff appraisal and staff development according to teachers’ needs.

Another theme for education reform refers to the enhancement of transparency of school performance. In this regard the government introduced the Territory-wide System Assessment (TSA) – which was also one of the main policies indicated in the EC Report 2000 (EC, 2000; HKEEA website, 2012). It consists of three main subjects: Chinese language, English language and mathematics. It is administered at primary three, primary six and secondary three once a year at all primary and secondary schools in Hong Kong. Its main purpose is to provide the government and school management with information on school performance in certain key learning areas for general school improvement (Lo, 2010).

#### 4.1.2 Providers and the Private Sector

There are two private universities in Hong Kong, the Open University and the Shue Yan. Both of them recruit full-time students, even if the Open University initially concentrated on part-time students. On the other hand, public universities also offer self-financed continuing education units with a wide range of lifelong learning provision – which, by government decision, are self funded and not sponsored by public funds (Cribbin, 2011).



The self-financed continuing education units are derived from the British extracurricular tradition. The University of Hong Kong's Department of Extra-Mural Studies was established in 1956 and became a School of the University in 1992. The University of Hong Kong School of Professional and Continuing Education (or HKU SPACE) – which represents one of the focal centres in providing lifelong learning opportunities – was also established in 1956 and up to 1995 relied on monetary subsidies from HKU to fund its operation. Only after 1996, but especially from 1999 onwards, did the school adopt an independent commercial mode of operation, without receiving financial subsidies (Zhang, 2010).

The initial focus of these units provides general interest courses and some more professional ones. They also supported continuing education courses outside the universities, mostly on a part-time basis. During the 1980 to 2000 period, the move from a manufacturing based economy to a service based economy required a larger provision of degree level opportunities together with an upgrading of skills. By the end of the eighties, these units were already able to meet the growing need for studying up to degree level as well as for continuing professional education (Cribbin, 2011).

Education at the sub-degree level – which includes programmes such as higher diplomas and associate degrees – are provided by the Vocational Training Council (VTC), community colleges, the continuing education sections of local institutions, as well as private institutions and organizations. The VTC could be considered an “almost-public” organization in Cribbin's words (2011). It is a government-subsidized operation on a large scale. At the beginning, it was established to support the development of expertise for the manufacturing industry. Later, it was transformed to meet the skills needs of the service industries at the basic level. It is supported financially with an extensive range of centres. The VTC offerings cover a wide range of trades and industries, including construction, logistics, engineering, tourism, food catering, design and multimedia production, management and commerce, as well as car repairing, mechanics, beauty, and hairdressing. All these offerings are available at the certificate, diploma, higher diploma and even degree level subject to entry qualifications and requirements for student enrolment (Tam, 2012).

In addition to the VTC, several other organizations should be mentioned. One is the Caritas, a Roman Catholic organization that provides adult continuing education opportunities from basic to degree level. Others include a range of private company provisions some structured as not for profit and some for profit. They vary from local institutions to subsidiaries of major international commercial education chains, at large and small scale.<sup>7</sup>

### 4.1.3 Intake and Provision of Lifelong Learning

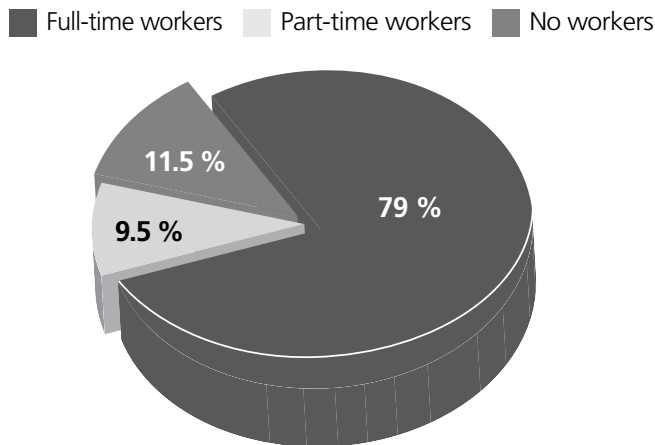
The scale of the whole lifelong learning sector is difficult to determine and estimates can vary according to the different elements taken into account. According to the Survey on the Demand for Continuing Education in Hong Kong 2011/2012, carried out by HKU SPACE, the overall continuing education participation rate among Hong Kong citizens (aged 18 to 64, non-full time students) was 27.5 per cent in 2011 with an estimated number of adult learners of 1.46 million. In terms of gender, among the total adult learners 43.2 per cent were male and 56.8 per cent were female with the latter showing a larger percentage of participation. Referring to work status, full-time workers were more active in pursuing continuing education than part-time workers and non-workers. Among all adult learners, 79 per cent were full-time workers. Together with part-time labour, workers represented about 88.5 per cent of the learner population. The so called no-workers group refers in particular to housewives (5.9 per cent), the unemployed (3.2 per cent) and retired (2.7 per cent).

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<sup>7</sup> Examples of local institutions include the Hong Kong Management Association, which operates on a large scale and offers its own and overseas collaborative operations. Overseas groups such as Kaplan and the Raffles Group from Singapore. Cribbin (2011), p. 146.



Figure 2: Participation Rates in Lifelong Learning in Hong Kong (2011)

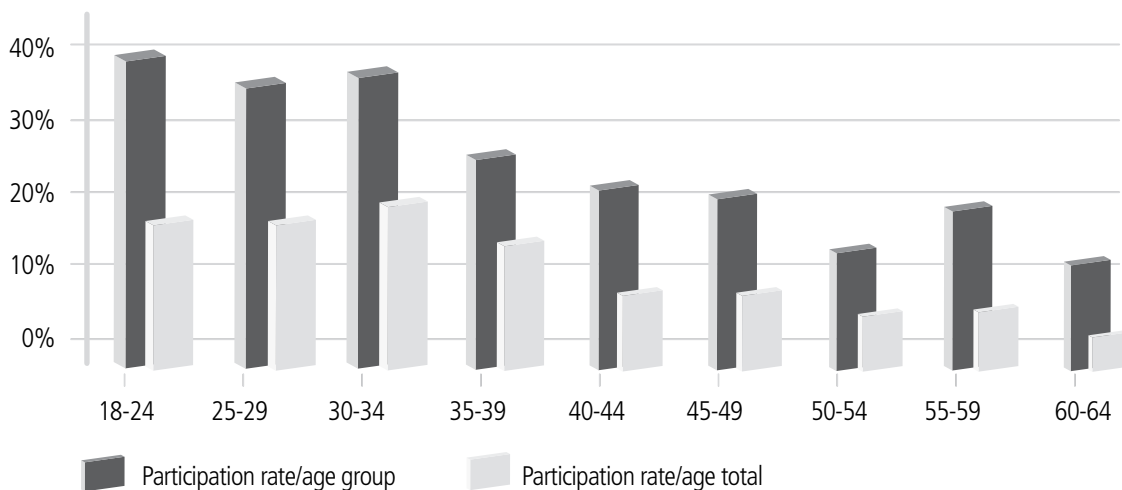


Source: HKU SPACE Survey 2011/2012.

In relation to monthly income, in 2011 the working groups with higher monthly incomes participated more actively in further studies. The participation rates stayed at more than 40 per cent for the HKD30,001 to 50,000 and HKD20,001 to 25,000 salary groups, which were the two most active groups in undertaking continuing education courses (HKU SPACE, 2011/2012).

The survey (HKU SPACE, 2011/2012) revealed that younger age groups appeared to be more active in continuing education: for example, the age cohort 18 to 24 had the highest participation rate (40.3 per cent) among all age groups. The participation rate remained 21 per cent for the 45 to 49 age group as the previous survey (2009/2010) showed. The participation rate decreased gradually from the youngest cohort to the oldest one, the 60 to 64 age group, with a rate of 11.8 per cent.

Figure 3: Participation Rate by Age Groups (2011)



Source: HKU SPACE Survey 2011/2012.

In terms of programmes and academic level pursued in 2011, non-award bearing courses (65.5 per cent) were the most popular followed by the category of certificate, diploma, and higher diploma programmes (23.5 per cent), bachelor degree (5.1 per cent) and postgraduate (5.9 per cent). The top ten pursued subjects are explained in Table 16:

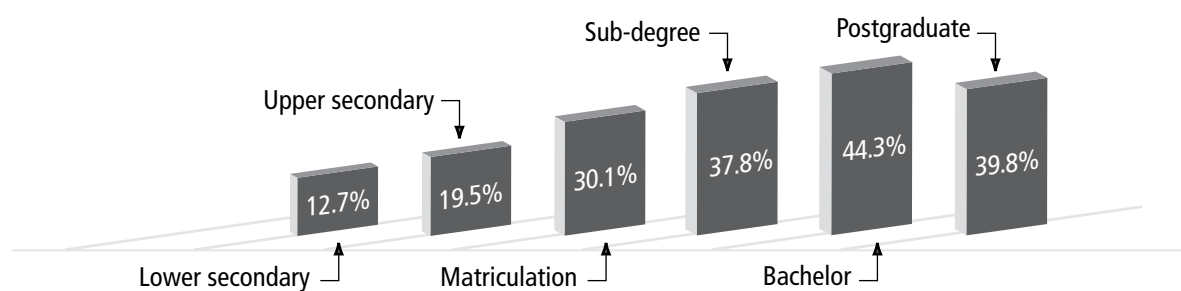
*Table 16: Most Popular Subjects (2011)*

Subjects	2011
1. Languages (including translation)	20.0%
2. Arts / music / crafts / design / dance / performing arts	10.8%
3. Business management	8.8%
4. Education and educational administration	7.3%
5. Accounting	6.6%
6. Banking, finance, insurance and investment	4.9%
6. Medical science (including Chinese medicine)	4.9%
7. Computer	4.6%
7. Engineering	4.6%
8. Sports	3.7%

Source: HKU SPACE Survey, 2011/2012.

Looking at participation rates and educational attainment, those with greater achievements were also the most active pursuing continuing education. According to the data released by the HKU SPACE Survey (2011/2012), in 2011 12.7 per cent of adult learners belonging to lower secondary or below, participate in continuing education as do 19.5 per cent of upper secondary level, 30.1 per cent of matriculation level, 37.8 per cent of sub-degree level, 44.3 per cent of bachelor level and 39.8 per cent of postgraduate level.

*Figure 4: Educational Attainment of Adult Learners (2011)*



Source: HKU SPACE Survey 2011/2012.

In terms of personal expenditure, the annual average for further studies was HKD10,764. The estimated total expenditure on tuition fees amounted to HKD15.7 billion in 2011. About 18 per cent of the respondents to the survey (HKU SPACE 2011/2012) spent between HKD3,000 and 5,999 for their further studies. The second largest group (16.7 per cent) spent between HKD6,000 and 9,999, while the third group (13.6 per cent) spent below HKD 999.

In terms of funding, in 2011, nearly 30 per cent of adult learners were sponsored by the government, their employers, family or friends. Among all sponsorship recipients, the government represented the main sponsor with over 60 per cent, while employers contributed 48.3 per cent and family and friends 7.9 per cent. In absolute terms, 18 per cent of adult learners were funded through various government-sponsored schemes such as the CEF. Employers sponsored around 14.4 per cent of the adult learners while family or friends sponsored about 2.4 per cent (HKU SPACE, 2011/2012).

Compared to the previous years, the participation rate in 2011 was 27.5 per cent and was more or less the same as 2009, which showed an increase of 2.7 per cent compared with the rate in 2007. (HKU SPACE, 2009/2010 and 2011/2012). In 1991 (Chan and Holford, 1994), the overall percentage was lower with 22.53 per cent; and in 2001 it further decreased to 21.7 per cent (HKU SPACE, 2001).

In terms of funding, data showed a moderate increase of nine per cent of estimated total yearly expenditure, from HKD14.4 billion in 2009 to HKD15.7 billion in 2011 (HKU SPACE, 2009/2010 and 2011/2012). It is worth noting that in 1991 the volume of trade in continuing education was estimate to be in the order of HKD 2.6 billion (Chan and Holford, 1994). After 10 years, in 2001, it reached HKD14.7 billion. Although this value refers to the estimated volume of trade rather than the annual expenditure on continuing education – (and is not directly comparable to the data of 2009 and 2011) it shows the dramatic increase of the sector in the last two decades. (HKU SPACE, 2001)

Further, the demand for non-award bearing courses has remained the highest among all programmes for the last four years (2007 to 2011). However, looking at the previous decades, it is interesting to note that in 1991, 60 per cent of courses were short-term and only the 23 per cent which lasted more than 100 hours usually awarded a qualification such as a certificate, a diploma or a degree (Chan and Holford, 1994). Already in 2001, 29.6 per cent attended short courses while 32.4 per cent took certificate/diploma courses. This data shows that Hong Kongers tend to pursue more award-bearing courses than before, seeing them as more useful for their career development, at the expense of short courses which were mainly taken for interest and personal development (HKU SPACE, 2001).

It is significant at this point to reflect on the estimated projection of the higher education population. The new structure “3+3+4” introduced since 2009 – which mainly involved secondary and higher education – has put pressure on the provision of post-secondary level vocational and education programmes while contributing to the general enhancement of the system of continuing education.

The community college sector now comprises some 20 institutions with a full-time student population of about 28,000. This data shows a strong improvement in available opportunities for post-secondary education even if government strategies during these years have not been developed in a clear manner. While in 2012, there will be some 80,000 school leavers, it is anticipated that by 2020 this number will have dropped to 50,000. The private sector and the lifelong learning sector will therefore have to expand in the short term to meet current needs, but they will face contraction in the medium term as demand drops considerably due to demographic change (Cribbin 2011).

## 4.2 Identification of Key Competencies for the Hong Kong Job Market

### 4.2.1 The Qualifications Framework

Attention should be given to the establishment of a system of lifelong learning to meet the challenges and demand of a knowledge-based economy for advanced knowledge, skills and competences. In order to fill the gap between the need for and access to new knowledge in the workplace, many countries seek to maximize their human resources by increasing training opportunities. The main strategy is to establish structures that aim at offering a unified system for standards and recognition of qualifications and, in turn, learning pathways for continuing education. Some countries – like Malaysia, El Salvador, Finland, Jamaica, Mexico, Singapore and Uruguay – have primarily adopted vocational qualifications frameworks while some others – like the United Kingdom, Australia, New Zealand and South Africa – have developed comprehensive qualifications frameworks embracing both vocational and academic sectors (Poon-McBrayer, 2010) and Hong Kong is no exception.

As previously underlined, the 1990s comprehensive education reform included a complete reorganization of the lifelong learning system. In order to develop the continuing education sector as the prime catalyst to promote lifelong learning, the EC (2000) proposed the establishment of a comprehensive QF, covering both vocational and academic sectors:

*To ensure sustainable manpower development amidst the rapidly changing world, we need to facilitate articulation among academic, vocational and continuing education through the establishment of a comprehensive and voluntary network of learning pathways – the QF. By encouraging and promoting lifelong learning, the framework will enable individuals to pursue their goals according to their own road-maps (QF website, 2012).*

In February 2004, the Executive Council endorsed the establishment of a seven-level cross-sectoral QF and its associated quality assurance mechanism. The QF aims at clearly defining the standards of different qualifications, ensuring their quality and delineating the links between different levels of qualifications. The QF could be defined as a hierarchy that orders and supports qualifications of academic, vocational and continuing education. In order to strengthen the industries' leading role in the development of vocational training and to enhance its effectiveness, the Specification of Competency Standards (SCSs) were developed by the respective industries. Together with SCSs the setting of the quality assurance mechanism was also developed to guarantee an extensive acceptance of the qualifications discussed by various education and training bodies (Poon-McBrayer, 2010).

Industries play a crucial role in QF's implementation and the development of the SCSs. The EDB assists various industries to set up their Industry Training Advisory Committees (ITACs),<sup>8</sup> which consist of a platform for employers, employees, professional bodies and other stakeholders to exchange their views on manpower development and upgrading, and to work with the EDB to take forward the QF.

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<sup>8</sup> Up to now, ITACs have been formed for eighteen industries, namely Automotive, Beauty, Banking, Chinese Catering, Elderly Care Service, Electrical & Mechanical Services, Hairdressing, Import & Export, Information & Communications Technology, Insurance, Jewellery, Logistics, Manufacturing Technology (Tooling, Metals & Plastics), Printing & Publishing, Property Management, Retail, Testing, Inspection & Certification and Watch & Clock. Refer to QF website, 2012.

*The terms of reference of the ITACs include three main issues:*

1. The development of the SCS, its maintenance and update as well as the formulation of a Recognition of Prior Learning (RPL) mechanism for the industry;
2. The promotion of the QF within the industry;
3. The strengthening of a closer collaboration between the Secretary for Education and the Committee to discuss and advise on such other matters relevant to the QF (QF website, 2012)

When the industry-wide consultation on the draft of the SCSs is done, training providers develop appropriate training programmes accordingly. The programmes and related qualifications would then be recognized under the QF if they are quality assured by the Hong Kong Council for Accreditation of Academic and Vocational Qualifications (HKCAAVQ).<sup>9</sup> Further, under the QF, qualifications are not only confined to academic and training attainment. Individual industries are in charge of developing a so called Recognition of Prior Learning (RPL) mechanism to recognize existing workers' skills, knowledge and work experience. This mechanism is indeed useful for all employees who after obtaining their qualifications may pursue further studies at different levels for higher and wider specializations.

In addition to this mechanism there is the Credit Accumulation and Transfer (CAT) system which provides the flexibility needed to outfit individual circumstances. Further, it helps to avoid or at least minimize duplication in training and therefore learners can systematically accumulate learning and training credits acquired from various courses and convert them into a recognized qualification. The development of the QF helps to better define CAT between sectors and training providers thanks to the creation of a unified platform and common benchmarks. Generally speaking, the QF plays a crucial role within the framework of secondary education. The SCSs developed by industries, in fact, would support the Applied Learning Courses under the new academic structure for senior secondary education, providing diversified learning experience and choices to students and enabling them to master the basic skills required by various industries (QF website, 2012).

## 4.2.2 Competency Standards

Referring to lifelong learning and competencies, a special consideration has been given to the development of the SCSs. In Hong Kong, qualifications recognized under the QF are outcome-based and are not restricted to academic attainment. In the case of the academic sector, the outcome standard of qualifications refers mainly to the knowledge and skills a person possesses and these standards are usually set by scholars. In the vocational sector the outcome standards of qualifications are set by individual industries which, in order to identify the specific outcome standards required for different levels of qualifications, need to develop SCSs. The SCS for an industry mainly includes the competency standards required at various levels which correspond to the industry targets for the skills and knowledge necessary to perform a certain job. The competency standards are then grouped together to form a qualification at a particular level while the evaluation guidelines for the outcome standards are being drafted (QF website, 2012).

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<sup>9</sup> The Hong Kong Council for Accreditation of Academic and Vocational Qualifications (HKCAAVQ), formerly named as Hong Kong Council for Academic Accreditation (HKCAA), is a statutory body established under the HKCAAVQ Ordinance, Cap. 1150. With the need to expand the Council's scope of services to cover accreditation of vocational qualifications underpinning the implementation of the Qualifications Framework (QF), the said Ordinance came into effect on 1 October 2007 through legislative amendment of the HKCAA Ordinance. Since then, the Council was renamed as HKCAAVQ. Thanks to the Accreditation of Academic and Vocational Qualifications (AAVQ) Ordinance, Cap. 592, which were fully operative starting 5 May 2008, the HKCAAVQ is empowered to be the Accreditation Authority to undertake the quality assurance for the development of the QF. It is entrusted with the responsibility of assuring the quality of qualifications and their associated learning programmes and providers recognized under the QF. Furthermore, HKCAAVQ also takes up its statutory role as the Qualifications Register (QR) Authority to administer the QR. Refer to QF website, and to the EDB - HKCAAVQ website itself for more detailed information, 2012.

The development of SCSs has been crucial for the implementation of the QF and its associated quality assurance mechanism in Hong Kong. Industries play a decisive role in the process through participation in the Industry Training Advisory Committees (ITACs) which are in charge of developing, maintaining and updating the SCSs. In order to guarantee continuous relevance of an SCS, the ITAC review and update the SCS regularly according to the latest manpower requirements while, on an annual basis, supplemental corrections to the competency standards are also made. The SCS, furthermore, are designed in a flexible way so that they can match easily both small and large companies and the full range of education and training needs of the industry (QF website, 2012).

The competency standards applicable to an industry are presented as “units of competency” in its SCS and each of them comprises eight basic items: name, code, level, credit, competency, range, assessment criteria and remarks. When the SCSs have been selected, training providers are able to design specific training programmes, making learners achieve the specified competency standards. Further, thanks to the role played by the industry in the development of the competency standards, training programmes are designed to be strictly related to the requirements of the industry ensuring trainees possess skills that can be objectively measured (QF website, 2012).

This mechanism theoretically gives more flexibility to training providers, employers and learners. It facilitates employers to identify suitable employees and at the same time reduce new recruits’ adaptation period and its related costs. Learners, on the other hand, are free to acquire any units of competency specified in the SCS according to their own needs, accumulating credits to obtain various qualifications at different levels. Since SCS-based programmes are developed with units of competency, learners have their qualifications accumulated and move along the different levels of progression which are clearly defined in progression pathways whereby trainees may draw up their own career development plans. In addition, employers may provide tailor-made in-service training to individual employees, or use the SCSs as a criterion to identify personnel with suitable skills and knowledge for recruitment or promotional purposes. In the long term, SCSs and the close links among training and industries would help to reduce unemployment while ensuring an effective placement of training resources are available (QF website, 2012).

### 4.2.3 Key Competencies for Employment

#### 1. Language skill

In order to maintain Hong Kong’s international position, its education system is mandated to “produce sufficient well educated people able to communicate in English and Chinese” (EC, 1990; Lo, 2010). The main objective of government policies is reinforcing students’ language proficiency in order to make them biliterate (i.e. master written Chinese and English) and trilingual (i.e. speak fluent Cantonese, Mandarin and English). As Tung (1999) underlined: “It is the SAR Government’s goal to train our people to be truly biliterate and trilingual” (Lo, 2010).

This policy also applies to teachers. In terms of key competencies, it is worth quoting the Language Proficiency Assessment for Teachers (LPAT). As underlined by the Fourth EC Report in 1990:

*Hong Kong is an international business, financial and trading centre. English therefore has an important place in the economic life of our community. To ensure that all teachers achieve a necessary standard of language ability, we have established language benchmarks for those teaching English in junior secondary schools and Putonghua in primary schools (Tung, 1999; Lo, 2010).*

The LPAT was introduced in 2000, for English Language and Mandarin teachers. All in-service language teachers had to either pass LPAT or complete it by 2006 while all new teachers, from 2004, are required to have met the minimum requirement points before they start teaching (Lo, 2010).

Besides the LPAT policy measure, the government launched the Workplace English Campaign in 2000 to improve public awareness of the importance of having a good command of English in the workplace. The campaign promotes a high standard of English in writing and speaking to be achieved by the employees of different industries. Working people are also entitled to apply for a refund for completed English Language courses when they pass tests (Lo, 2010).

## 2. Other competencies

Education institutions try to educate students and more generally speaking, learners, on the importance of developing both specific key competencies and positive attitudes to learning. The term specific key competencies refer generally to those associated with a particular job which includes relevant knowledge or technical skills. The positive attitude to learning is instead associated with personal skills or personal qualities needed to support lifelong learning. Those competencies can be further divided into cognitive or intellectual competencies and personal attributes.

Specific key competencies are usually required when entering the job market or to pass exams at secondary or postsecondary education. In this regard the findings of Leung and McGrath (2010) regarding competencies needed to enter in a college or in a workplace are interesting. Their research undertakes a careful review of the vocational education curriculum offered at one Hong Kong institution. Through this analysis personal development opportunities related to the improvement of employability and broader personal development are explored. Their findings are described in the following table and represent an interesting example.

*Table 17: Competency Requirements for Colleges and the Workplace*

	Competency at College Level Required	Competency Required in Selection
1	Communication skills	Communication
2	Managing information	Customer focus
3	Using numbers	Business understanding
4	Creative thinking	Personal effectiveness
5	Problem solving	Creativity
6	Positive attitude	Service mindset
7	Positive behaviour	Working experience
8	Responsibility	Language proficiency
9	Learn continuously	Outgoing and friendly
10	Work safely	Analytical power
11	Work with others	Interpersonal skills



	Competency at College Level Required	Competency Required in Selection
12	Participate in projects and tasks	Good team spirit
13	Interpersonal skills	Knowledge
14	Social skills	Independence
15	Language	Professionalism proficiency
16	Self-improvement	Proactively
17	Time management	Willingness to learn
18	Presentation skills	Networking
19	Survival skills	Leadership
20	Handling stress	Problem solving
21	Implementing change	Negotiation

Source: Leung and McGrath, 2010, p. 105.

Employers sometimes require specified expertise in certain areas and would look to vocational education to fulfil such needs. For example, at the professional level, on top of undergraduate courses, such as law, accountancy and financial management, a certification and a concrete professional practice are usually required before obtaining a professional qualification. The same is true for professions such as accountant, financial analyst or solicitor, where specific courses at school are required (Lo, 2010).

Besides specific key competencies, learners need to develop a range of abilities that may be classified as personal qualities distinguished as cognitive or intellectual competencies and personal attributes. Cognitive competencies include the ability to analyse complex issues; identify the core of a problem as well as the means to solve it; synthesizing and integrating elements; clarifying values and making effective use of numerical and other information. They also include the ability to work co-operatively and constructively with others as well as to communicate clearly both orally and in writing (Lo, 2010).

Another key competence that has been underlined in Hong Kong education policy documents for the enhancement of curriculum at all levels (primary, secondary and higher education) is the need to improve learners' creativity. Rote learning is a feature that characterizes the education system of Hong Kong and students are generally criticized as lacking in creativity (Poon and Wong, 2008). Personal attributes on the other hand, refer to qualities like motivation, commitment, character, initiative, leadership, enthusiasm, ambition, honesty, reliability, integrity and so on. The personal and above all the moral dimension of individuals are issues becoming more and more important in job performance. These qualities are also needed to confront ethical issues which are more prevalent than ever and are becoming crucial in the education discourse too (Lo, 2010).

In the vocational context, the so-called generic (foundation) competencies have been developed. They refer to those skills and knowledge that are shared across different industries and trades and are relevant to most people in the workplace. They are complementary to the industry-specific competencies which



specify specialized skills and knowledge specific to an industry or profession. Their focus is on meeting workplace requirements rather than addressing the general education needs of learners (QF website). The Specification of Generic (Foundation) Competencies (SGC) covers four strands of foundation skills, namely, English, Chinese, numeracy and information technology. The SGC sets out the foundation competencies from QF Level 1 to QF Level 4.

For each strand, the SGC comprises three parts: a Function Map which gives an overview of the basic functional areas of the strand; a Summary Table of Generic Competencies which lists all competencies at each level; and the Units of Competency (UoC) section which provides full details of each competency unit in terms of performance criteria, range of application, assessment guidelines, etc. (QF website, 2012).

# Chapter 5

## *Factors of Lifelong Learning Participation*

### Introduction

This section underlines the major factors that influence participation in lifelong learning. The main reasons for pursuing continuing education are underscored together with factors that influence adult learners' choice of continuing education institutions. Reference is made to channels for obtaining continuing education market information while deterrents for not pursuing continuing education are shown in detail. The second part of this section refers to online learning which is attracting a great deal of attention. Online learners' profiles are described, in terms of gender, work, age and educational attainment. Reasons for not pursuing online education are also described.

### 5.1 Major Factors that Influence Participation in Lifelong Learning for Enhancing Learners' Employability

According to a HKU SPACE report (2011/2012), more lifelong learners indicated a strong interest in pursuing continuing education for "personal interest" (51 per cent). The second to the fifth motivations were related to the job itself, as for example the second "improvement in work capabilities" (34.2 per cent), or the third "learning new skills" (16 per cent). Table 18 describes in detail the top ten reasons for participating in continuing education.

*Table 18: Top Ten Reasons for Participating in Continuing Education (2011)*

	Reasons	%		Reasons	%
1	For personal interest	51.0%	6	For change of job	7.5%
2	For improvement in work capabilities	34.2%	7	Social trend	7.5%
3	For learning new skills	16.3%	8	For enriching social life	4.9%
4	Requested by employer	14.3%	9	For higher salaries	3.9%
5	For promotion	8.0%	10	Have time to study	3.2%

Source: HKU SPACE Survey 2011/2012.

It is interesting to note that in the previous HKU SPACE Survey (2009/2010), about 64 per cent indicated that studying is necessary at times of economic recession, and 70 per cent underlined how further studies can improve work competitiveness, useful during difficult economic conditions. The 70 per cent suggests that continuing education courses are particularly important at times of economic revival.

A further comparison with the 1991 survey (Chan and Holford, 1994) shows that the stronger motivations in pursuing continuing education were related to self-development (73.38 per cent), to improve job skills (70.50 per cent), to fulfil interest (70.50 per cent), promotion prospects (45.32 per cent), salary increase (35.25 per cent), to obtain qualifications (34.53 per cent), to change jobs (23.74 per cent) and peer-group encouragement (14.39 per cent). The first three factors appear to be much more relevant than the others. In fact, promotion, salary increase and upgrading academic or professional qualification, though considered important by one third of the respondents, did not represent the main factors in influencing people to attend continuing education classes.

According to the 2011/2012 survey, in terms of factors that influence adult learners' choice of a continuing education institution, "level of course of fees" was the first concern indicated by a the largest group of learners with a percentage of 41.5 per cent. The interviewed were asked to quote the three most important factors that affect their choices. The results are summarized in Table 19.

*Table 19: Factors for Choosing Continuing Education Institutions (2011)*

	Reasons	%		Reasons	%
1	Level of course fees	41.5%	6	Appraisal of courses offered	19.6%
2	Appropriateness/practicability of courses	32.3%	7	Recognition of qualification	19.5%
3	Location of teaching and learning venue	31.1%	8	Quality of lecturers/tutors	15.6%
4	Class commencing time	29.5%	9	Have course fee subsidies	2.7%
5	Reputation of the institution	24.3%	10	Obtain academic qualifications within a short period of time	2.5%

Source: HKU SPACE Survey 2011/2012.

Referring to channels for obtaining continuing education market information, "internet and email" was the most popular with a percentage of 57.5 per cent in 2011. It is followed by "referral by relatives and friends" with 47.8 per cent and in the third place was "newspaper and magazine advertisements" with 25 per cent. Other channels were "course pamphlets/school prospectus" (13.8 per cent), "association/society organizations" (11.4 per cent), "education/curriculum institutions" (10.9 per cent), "TV/radio" (4.6 per cent), "referral by employer" (4.1 per cent).

Deterrents to participating in continuing education are explained in Table 20. They include "no free time" (49.7 per cent), "not necessary to further studies" (20.5 per cent) and "take care of children and family" (13.9 per cent).

Table 20: Reasons for not Pursuing Continuing Education (2011)

	Reasons	%		Reasons	%
1	No free time	49.7%	6	No appropriate courses/programmes	15.1%
2	Not necessary to take courses	20.5%	7	Aged/ Not in good health	9.5%
3	Take care children/family	13.9%	8	Not enough money to pay for course fee/course fees too expensive	8.2%
4	Work (e.g. overtime, on shift duty, on business trip)	9.9%	9	No special reason	8.2%
5	No interest in taking courses	10.0%			

Source: HKU SPACE Survey 2011/2012.

Compared with the results of the 1991 survey (Chan and Holford, 1994), the major deterrents in pursuing continuing education are indicated as no time (71.69 per cent); and need to take care of the family (45.23 per cent). The results also indicated inadequacy on the part of continuing education providers to provide course information (45.23 per cent), and inconvenient times (49.23 per cent) and place (40.00 per cent). Course fees didn't appear to be a major deterrent even if 23.08 per cent didn't have money to attend and 19.38 per cent considered the fees too high.

Many people regarded continuing education courses as useful but not suitable for them (36.31 per cent). The deterrents for the group who didn't attend any continuing education courses are still related to course schedule and geographical location, and also to cost and self-confidence factors. For housewives, the time problem was the most serious (82.46 per cent) while for older age groups many felt they were too old to study (69.39 per cent). Blue-collar workers, who had an extremely low participation rate (11.27 per cent) considered no time (80.28 per cent) and inconvenient meeting places (57.75 per cent) as major factors for not pursuing continuing education; 53.52 per cent of them stated that they were not interested in attending continuing education. These data show that continuing education at that time for some sectors of the population was not an important part of their culture (Chan and Holford, 1994).

## 5.2 The Increasing Role of Online Learning

Particular attention needs to be given to online learning which is attracting a great deal of attention among adult learners. According to the HKU SPACE Survey (2011/2012), about 44 per cent of those interviewed looked at online learning with a positive attitude when planning to pursue continuing education, while more than half, 51.5 per cent, had a negative attitude. Among those who were willing to try online learning, 45 per cent were male and 43.1 per cent female. Among the age groups, the 40 to 49 cohort was the one showing the highest tendency towards online learning with a percentage of 47.5 per cent. Referring to the expansion of online learning it is worth considering the results of the survey conducted in 2001 (HKU SPACE, 2001) when only the 5.4 per cent of the respondents chose "distance learning – via internet" as a preferred mode of study. In the same year, another survey conducted among higher education students revealed an even lower figure of 0.8 per cent of respondents who perceived online learning as a major mode of programme delivery (HKU SPACE, 2001).

Full-time workers showed a slightly stronger interest to use online learning (45.6 per cent) compared to part-time workers (42.3 per cent) and the non-working group (40.7 per cent). In terms of educational attainment, those with matriculation showed a stronger tendency to use online learning (55.9 per cent), followed by the sub-degree group (45.9 per cent), the upper secondary (45.5 per cent), postgraduate (42.9 per cent), bachelor (42.3 per cent) and the last group of lower secondary or below (37.5 per cent).

Interest in participating in online learning increased gradually with the rise of monthly income, so the highest level is showed by the HKD30,001 to 50,000 group with 51.0 per cent, followed by HKD6,001 to 10,000 (47.7 per cent) and HKD10,001 to 15,000 (47.2 per cent).

Among those who perceived online learning as a suitable mode for pursuing continuing education, the top benefits for choosing it were "flexible learning time (42.9 per cent) and "flexible learning place (22.5 per cent). Those were followed by benefits more related to the connectivity of online learning, such as "download reference materials" (20.6 per cent), "lecturers answer question online" (19.7 per cent) and "surfing learning websites online" (15.3 per cent). Others benefits were "online video teaching" (11.1 per cent), "download course notes (10.3 per cent), "submit assignment online (10.2 per cent), and "student online forum discussion" (8.2 per cent).

Referring to deterrents, those who perceived online learning in a negative way corresponded to 56 per cent. Their reasons are shown in Table 21.

*Table 21: Deterrents to Using Online Learning (2011)*

	<b>Reasons</b>	<b>%</b>
1	Face-to-face teaching/ discussion is better	56.1%
2	Not use/ seldom use computer to go online	16.1%
3	Online learning needs to be more self-disciplined	11.9%
9	Don't know how to use computer to go online	9.6%
10	No time	8.3%
11	Do not want to use computer which is tiring	8.3%
12	Online learning has low level of recognition	7.0%
13	Online learning is boring	6.2%

Source: HKU SPACE Survey 2011/2012.

# Conclusion

## *Strengths, Limitations and Consequences of the Hong Kong Case*

Although the range of different approaches and perspectives in the interpretation of the ideological implications of lifelong learning – seen as neo-liberalism, neo-progressivism or as a concept that contains competing ideologies – the common observation that emerges is that lifelong learning in Hong Kong is economically focused and financially oriented. The policies are justified in economic terms, and the end product is also economically and financially focused on increased employment and increased self-financing of learning. The major target is, in fact, competitiveness in the global market while the major means is to increase individual responsibility both from the demand side and from the provider side. For example, Lee (2007) quoting Medel-Anonuevo et al. (2001) says: “By promoting an individual agency in determining the learning agenda, the welfare state tries to abdicate its responsibility to provide economic opportunities”. In the case of Hong Kong, Kennedy and Sweeting (2003) criticized the proposal for education reform in Hong Kong as trying to make continuing education self-financing rather than reliant on government subsidy.

As one of the world’s leading international financial centres, Hong Kong has a major capitalist service economy characterized by low taxation and free trade. The economy of Hong Kong is governed under positive non-interventionism with a laissez-faire approach that follows a neo-liberal economic model. From these assumptions it can be easily understood how educational planning and policy decisions have been very much influenced by economic considerations. The government has strongly debated on the intervention strategy in education policies. The government’s active role in the financing and regulating of education services implies that a balance between political mechanisms and individual decisions has been found (Lo, 2010).

In this discourse, the principles of inclusiveness and access have to be considered and the pursuit of equity represents a crucial factor in justifying the intervention. One of the government’s principal objectives is to increase participation of lower socio-economic groups in higher education. Therefore, those who are intellectually capable should be encouraged to carry on studying regardless of their family background: so subsidy should be available for all. What the public is most concerned about is income-related equity due to the fact that the lowest-income families will find it difficult to pay high education fees. This forces the younger generation to enter the labour market early without adequate skills training or qualifications. From this point of view, lifelong learning and education need to be financially supported. Moreover, this can help minimize intergenerational poverty by helping young people to enhance their employability, while at the same time promoting social mobility (Chan, 2010).

Referring to the lifelong learning sector and in particular to postsecondary education, we underline how it has been developed mainly within a market framework. The sector has been lightly regulated up to now especially when compared to the government funded sector. This is changing. The Hong Kong Government is playing a more active role to ensure a level playing field by legislating for comparable standards between the private sector and the self-funded self-accredited sector (principally the university continuing education units). The government aim of regulation is clear, even if it has been sometimes belated in terms of the very significant developments that have taken place in Hong Kong society.

Although this policy strategy change towards intervention has led to some tension, as Cribbin (2010, 2011) has underlined, the process is moving forward and some important steps have been achieved with the following policies:

1. The Non-Local Higher and Professional Education (Regulation) Ordinance (1998), which is mainly a consumer protection measure that treats private and self-accrediting institutions separately;
2. Guidelines for Associate Degrees and Higher Diplomas (first promulgated in 2001, while the joint common descriptors came out in 2009) – applied retrospectively and largely drafted by the lifelong learning sector;
3. The Hong Kong QF and Qualifications Register (QR) which is emerging as a principal lever;
4. The Education Ordinance and the Post-Secondary Colleges Ordinance as longstanding items of legislation. The amount of regulation is still emerging but is most focused where government provides support. Self-funding institutions, on the other hand, may need to reach an acceptable adjustment with government on this issue of regulation or risk less agreeable measures being introduced later.

The analysis of Lo (2010) on current Hong Kong education policies is quite useful to establish to what extent education planning and policy decisions should be guided by economic considerations. One of the basic rationales behind investment in education – which refers to human capital theory frequently quoted in policy addresses of the Hong Kong Government – is that education increases earnings by enlarging the capability or productivity of individuals. However, the cost and benefits of education consist of a massive range of inter-related variables. Education may have contributed to economic growth, but it is not a guarantee for economic return. As Lo (2010) says “over emphasis on economic values of education and indiscriminate application of human capital theory by politicians in educational planning and policy decision could be misleading or raising false hope.”

Looking at Hong Kong’s economic competitiveness, we can assert that it is partly due to its free trade policy which is a heritage of the British colonial rule. Following Lo’s (2010) discourse, this feature can be taken as a kind of cultural capital which differentiates Hong Kong from other Asian countries with which it is competing. Further, the competitiveness of Hong Kong provides an opportunity to take advantage of the booming Chinese economy. Therefore, to enhance competitiveness, it is not sufficient to take into consideration only economic factors: social and cultural capital have to be considered as major criteria to increase competitiveness.

Further, referring to cultural capital, another element underlined by Poon and Wong (2008) should be taken into account in the analysis of strong and weak points in the educational policies of Hong Kong. This is the position of elite schools which have played a significant role in the transmission of knowledge and thereby accumulation of cultural capital. Although the traditional elite schools were criticized by the HKSAR Government after 1997 as the causes of engendering elitism and creating inequality and inequity, on the other hand, as suggested by Poon and Wong (2008), the elite schools have been able to absorb the most brilliant students and subsequently have supported the emergence of a climate of academic excellence. In their view, it is legitimate that they should be given the right to preserve their own traditions. If the elite schools are dumbed down in the name of equality and equity, the cultural capital of Hong Kong will be diminished.



When key competencies are considered, a key element should also be taken into account: in addition to the intellectual effectiveness of the person, personal attributes should be valued. Two terms have been adopted to clarify this issue: “outer life” which mainly refers to employment or income generation and “inner life” that addresses personal growth, creativity, independent thought and evaluation. The lack of moral content is a known weak point of liberalism, as Lo (2010) underlines in the following way:

*Any effort to define a “good” education seems not to meet the wishes and interests of individuals concerned. Usually, liberal models tend to take individual interests as given without being concerned on the formative development of individuals as a matter of public policy. Therefore, an economic-oriented education evolving from liberal ideologies tends to be inadequate when it tries to address issues related to the all-rounded individuals’ formation.*

Education discourse cannot avoid moral and spiritual issues and discussion of personal qualities such as honesty, integrity and consideration for others. In job performance, the need to face ethical issues is becoming more and more important. For example, companies and professional bodies need to have a code of ethics as one of the principal criteria for judging an occupation to be a profession. In scientific research areas such as medicine and genetics, professionals have to handle complex moral issues and new ethical problems.

Further, lifelong learning policies and policy-related documents are full of references to the values of economic globalization, knowledge economy, the significance of individual responsibility, the focus on learners’ need, and the provision of programmes and strategies. As underlined by Lee (2007), a missing link in many countries’ lifelong learning discourse is its significance for enhancing humanitarian values and the ideals of democracy and citizenship education on an individual level. A significant goal of lifelong learning education should also include the development of active citizenship, by providing learning facilities that could be accessible for every member of the community. In addition to the need of having economic goals in lifelong learning, an equally fundamental concern should be the development of an equitable and democratic environment that ensures learning for all and the right of access to learning.

In conclusion, the case of Hong Kong offers various elements for further reflection and for the development of future policies both within and outside Hong Kong’s borders. Although there are still different issues to work on, some major results have been achieved which play a crucial role in the reinforcement of the relation between lifelong learning education and employability. An example is the establishment of a QF flexible enough to create a platform where both academic and vocational competencies can be handled; SCSs closely linked to the industrial sector; and a formal schooling system at primary, secondary and higher education level which has been able to strongly enhance its education path in the last decade. These achievements contribute greatly to a more flexible market where employer’s needs can match learners’ expectations.

The QF initiative highlights how countries have been trying for some time to reform their qualifications systems to make lifelong learning possible and that’s the reason why they have been both criticized and supported. Nonetheless, they are still commonly regarded as essential tools for quality assurance by allowing a close monitoring of all qualifications and by providing a basis for comparison due to their transparency. Therefore, the QFs are to bring trust and confidence in qualifications for all users.

Generally speaking, the Hong Kong experience – which follows the Australian pattern of QFs – is considered to be positive. As Poon-McBrayer (2012) suggests, what can be learnt from its experience is that governments need to be much better connected with industry employees at the early stage of



developing the QF. The Hong Kong Government for example, succeeded in linking the learning needs of low-level workers when designing the QF, but it lacked an adequate understanding of their needs and concerns. This gap of understanding has ultimately resulted in numerous negotiations with the stakeholders as well as policies and practices that have damaged the very quality that will bring long-term benefits to all stakeholders. Therefore, a closer collaboration among policy makers, training providers, industries, and employers is fundamental to the success of adult and continuing education. Policy makers must see that qualifications recognized by a trusted framework benefit both the labour market and the lifelong learning system.

To pursue a comprehensive development of the education system and to satisfy the needs of learners and employers while enhancing employability, education planning and policy decision-making need to focus on economic considerations. However, other dimensions such as those mentioned above, which include for example moral, spiritual and ethical issues, as well as the development of active citizenship, should also be considered of equal importance. Education policy has to follow market rules but to fully meet employment needs the role of the public and the private sector should be balanced fairly.

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*Education Policies to make the Economy Work* was the second case study report to be developed as part of a UNESCO research project on Lifelong Learning and Employment Prospects/Employability in the Asia-Pacific, initiated by the Asia and Pacific Programme of Education for All (APPEAL), UNESCO Bangkok. The project aims to support the formulation of policies that can promote lifelong learning (LLL) as well as strategies and programmes to enhance the employability and employment prospects of working-age individuals living in Asia and the Pacific. With the insights gained from a comprehensive and comparative understanding of LLL, and with a particular focus on policy initiatives in context, we can devise concrete and relevant policy recommendations to implement effective LLL policies to enhance the employability of all citizens throughout the Asia-Pacific region.



United Nations  
Educational, Scientific and  
Cultural Organization

UNESCO Bangkok

Asia and Pacific Regional Bureau for Education

Mom Luang Pin Malakul Centenary Building  
920 Sukhumvit Road, Prakanong, Klongtoey  
Bangkok 10110, Thailand

Email: [appeal.bgk@unesco.org](mailto:appeal.bgk@unesco.org)

Website: [www.unesco.org/bangkok/education/appeal](http://www.unesco.org/bangkok/education/appeal)

Tel: +66-2-3910577 Fax: +66-2-3910866

