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List of abbreviations

AILA	International Association of Applied Linguistics
CLIL	Content and Language Integrated Learning
CMI	Chinese medium instruction
ED	Education Department
EMI	English medium instruction
EU	European Union
FL	Foreign language
HK	Hong Kong
HKSAR	Hong Kong Special Administrative Region
L1	First language
L2	Second language
LPAT	Language Proficiency Assessment for Teachers
MOI	Medium of Instruction
OECD	Organisation for Economic Co-operation and Development
PISA	Programme for International Student Assessment
PRC	People's Republic of China
SAR	Special Administrative Region
SSPA	Secondary School Places Allocation
UNESCO	United Nations Educational, Scientific & Cultural Organization

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1. Introduction

The aim of this paper is to take a clear, unclouded look at immersion education in Hong Kong in comparison with immersion models that can be found in Europe. Hong Kong's long-standing English-medium policy is a valuable knowledge resource which European countries looking to offer CLIL – content and language integrated learning – programmes to their students can utilise for their benefit.

The CLIL type education has become very popular even before researchers could garner empirical data in order to formulate frameworks for implementation of CLIL in practice and teacher education. It has been practised without much regulation, and today researchers like Baetens Beardsmore, Coyle, Dalton-Puffer, Frigols Martin, Langé, Lasagabaster, Mehisto, Marsh, Smit and Wolff among many others are working to deliver a much-needed theoretical framework which can be used to improve CLIL education.

Chapter 2. of this thesis is concerned with definition of terms relevant for this paper. The terms 'Medium of Instruction' and 'CLIL' are discussed. The definitions for 'Medium of Instruction' and 'CLIL' are somewhat unclear in the current literature, as there is no one authoritative framework for either MOI – Medium of Instruction – or CLIL, from which both forms of education would benefit. I also examine the ways in which the English language is nowadays used in schools and the society in some former British colonies, where immersion education is very popular and perceived as a privilege, sometimes at the cost of the students' first language.

In chapter 3., I discuss the definition of 'immersion education'. The commonalities and differences between EMI – English-medium Instruction – and CLIL are reviewed. For comparison between EMI and CLIL, I first have to establish whether they can be termed 'immersion education' as defined by Johnson and Swain (1997).

Chapter 4. is concerned with the historical backgrounds of CLIL in Europe and EMI in Hong Kong. It is important to show the growth of foreign language education,

especially in Hong Kong, which has had a long history of English-medium in class. The juxtaposition of Hong Kong's long history of EMI and the somewhat shorter, but eventful history of CLIL is enlightening, as it shows that some mechanisms in policy making and the demand for foreign language education go similar ways, especially when seen against the backdrop of the rise of English through globalisation.

Chapter 5. of this thesis once again takes up the issues that have arisen in earlier chapters and points out the similarities of issues that occur both in European CLIL and Hong Kong EMI. Two of the most pressing issues are looked at in detail – the need for frameworks for curriculum planning and for teacher education. The importance of these issues becomes apparent when one reviews the use of L2 in immersion education as it is practised nowadays. The research questions will be reviewed in more detail in the next section.

1.1. Research questions

Nowadays it has become increasingly important to speak at least one foreign language. In Europe, the EU has introduced the MT+2 model (mother tongue plus two additional languages) (cf. Commission of the European Communities 2003), while in Hong Kong, English has always been the language of commerce, trade and social advancement. Immersion education appears to be an excellent method to promote additive bilingualism. The focus of this paper is on the field of immersion education in Hong Kong and Europe and the similar issues inherent to both models.

English has been taught in Hong Kong for a long time. What started as a means to supply the colony with workers who could speak English to the colonisers soon turned into an opportunity for upward mobility for the people of Hong Kong. The demand for English immersion in Hong Kong schools has become even stronger with the rise of English as the international business and trade lingua franca. The need for English has been so strong as to surpass in importance every argument for comprehensive mother tongue education for a very long time. The call for full

immersion and increased exposure to English is the familiar argument that seems to prevail over any objection insisting on the importance of the mother tongue for learning, the development of cognitive skills and language scaffolding (cf. Gibbons, P.: 2002). The education policy has changed since the return of Hong Kong to the People's Republic of China in the school year 1998, aiming toward more Chinese in Hong Kong's classrooms. This has been met with outrage by parents and the economy. After 15 years of division in Hong Kong's schools between English-medium and Chinese-medium streams, the policy is yet again aimed at introducing more English in all schools. Not even the emergence of Putonghua as the new 'useful' language in Hong Kong has been able to challenge the popularity of English. Hong Kong now has to work on introducing a solid language policy which will allow the students to balance content learning with language acquisition.

The question as to how best to combine content and language learning has gained prominence in Europe. Language immersion became widely popular after immersion models were successfully implemented in Canada. Immersion models in Europe were at first used in border areas where two languages are the norm, in privileged schools and in efforts to revive minority languages. Only recently has immersion become more widely available and popular. The research in all matters CLIL has been slower than the growth of its popularity, resulting in a research gap which has yet to be filled. CLIL research in Europe also turns out to be very much EMI research, as the usefulness and popularity of English has not gone unnoticed by European policy makers. As CLIL classes are becoming more numerous, the need for research increases.

It is the aim of this paper to point out some issues that concern both EMI in Hong Kong and CLIL in Europe. Right now, there are few programmes offering languages across the curriculum which take in consideration the dual-focused nature of immersion education. My first research question aims to find out whether such curricula are needed:

1. Do CLIL and EMI programmes need curricula which accommodate the dual focus of immersion education?

Immersion programmes aim to offer content and language learning at the same time. Now that immersion education is finding its way into mainstream education, it is important to determine whether immersion programmes require curricula that are separate and/or different from those for mainstream L1 education and which take in account that teaching through L2 differs significantly from teaching through L1, maintain the balance between language and content and uphold the dual-focus of immersion education. At the same time, curricula need to determine attainable language and content goals for immersion classes.

The second issue with which this thesis is concerned is that of teacher education for immersion programmes:

2. Special and/or additional qualifications for teachers teaching content through L2 in EMI or CLIL – should they exist?

CLIL programmes face a lack of integration into current education policies. There are few CLIL teaching materials and few countries have opportunities or a binding framework for CLIL teacher education or qualification. Likewise, despite the long time during which English has been used as a Medium of Instruction in Hong Kong, teaching through a foreign language is only now becoming relevant topic for researchers in Hong Kong. The changes in MOI policies and the discrepancy between the *de iure* regulation and the *de facto* teaching practices make it difficult for researchers to formulate frameworks for teaching. EMI and CLIL both face the concern that additional training for teachers in order to teach in a foreign language would be cost-intensive and would depend on approval by policy makers. The thesis aims to determine whether opportunities for additional teacher training for immersion education should be implemented.

1.2. Technical terms and abbreviations

The term ‘Chinese medium instruction’ will sometimes be abbreviated as CMI, as ‘English medium instruction’ will be abbreviated as EMI, and ‘Medium of Instruction’ as MOI. The ‘Chinese’ mentioned in the text is always meant to be

understood as the Hong Kong local variety Cantonese, while Putonghua and Mandarin are never referred to as 'Chinese', although in principle they are languages which are spoken in the People's Republic of China and could be called 'Chinese'. For the purposes of this text, only Cantonese will be referred to as Chinese. People's Republic of China may be abbreviated to 'PR China' or 'PRC', while 'SAR Hong Kong', 'Hong Kong' and 'HKSAR' always refer to the area which is today known as Special Administrative Region of the People's Republic of China Hong Kong.

The European umbrella term for foreign language medium programmes 'Content and language integrated learning' will be abbreviated as CLIL. As "an additional language is often a learner's 'foreign language', but [...] may also be a second language or some form of heritage or community language" (Coyle *et al* 2010: 1), for the purposes of this text, the term CLIL will be used for all these interchangeably. The terms 'Europe' and 'EU' are used interchangeably.

The abbreviation L1 is used for the terms 'mother tongue' and 'first language' which are used interchangeably. The abbreviation L2 is used for 'second language' and/or 'foreign language'. The term 'foreign language' is referred to as FL. For the purposes of this text, both 'second language' and 'foreign language' will be used interchangeably, although 'foreign language' occurs more frequently. This is because English is *de facto* a foreign language in Hong Kong, but *de iure* it is supposed to be (or to become) a second language for the Hong Kong students.

In section 2.1., the concept 'Medium of Instruction' is described. The concept 'immersion' is discussed in section 3.1. The latter is used for education models in which a foreign language is used to teach content. Both Hong Kong EMI and European CLIL are, for the purposes of this text, subsumed under the term 'immersion', although there are differences in the amount of exposure and immersion in both models. Both models will, throughout the text, also be referred to as 'languages across the curriculum'.

1.3. Research design and methodology

While in Europe there is no unified policy concerning teaching through foreign languages, CLIL (an umbrella term for L2-medium models) is gaining momentum and popularity (cf. Marsh *et al* (eds.) 2002). It seems worthwhile to look at Hong Kong, where English as a Medium of Instruction has been in use for a very long time.

The aim of this thesis is to look at two types of immersion education – EMI in Hong Kong and CLIL in Europe – and to identify similar issues that can be found in both immersion models. To this end, I will analyse EMI and CLIL along the criteria established by Johnson & Swain (1997) for identifying immersion programmes. This will serve to establish whether both programmes in question can be compared at all.

While the study is concerned with education and schooling in Hong Kong and Europe in its entirety, it mostly centres on secondary schools, as they have proven to be the ground on which the language in education policies have had most impact (cf. Eurydice 2006) and (Kan *et al* 2011). For a long time, the secondary schools in Hong Kong have been the point of transition from one Medium of Instruction to another – Chinese to English and back to Chinese, as younger students are taught in their first language most of the time, while tertiary-level education was conducted only in English. Changes in the educational system concerning the MOI have taken place only recently in Hong Kong (cf. Evans 2009).

I aim to describe and then compare the status quo in secondary immersion education in schools in Hong Kong and Europe. My focus will be on curriculum planning in connection with the implementation of teaching of content through L2 and on the training that future teachers and teachers in service receive in order to teach through L2.

The study is based on data found in secondary sources and studies that have been conducted on the topic of the Medium of Instruction in Hong Kong and Europe, as

well as on policy documents. It spans more than a century of English as a Medium of Instruction in Hong Kong's education system (cf. Evans 2011) as well as the somewhat shorter CLIL history in European countries since roughly the 1990s, as the term CLIL exists since 1994 (cf. Coyle 2010).

Identifying and pointing out the issues which both have to face might help European CLIL programmes take a shorter route around difficulties that Hong Kong has faced in its past and is now working to overcome, toward even more effective ways of offering immersion education to students.

2. Definition of relevant terms

In the following chapter, I will try to formulate a working definition of the terms 'Medium of Instruction' and CLIL for this paper. Especially the term 'Medium of Instruction' is almost as difficult to define as the very broad term 'language' itself. There are many points of view regarding this topic and a distinct unwillingness to settle down on one definition. It is important to point out that while it is true that defining a term that encompasses as much as 'Medium of Instruction' does is difficult, it is just as crucial for policy makers to determine how their 'Medium of Instruction' will function in practice.

2.1. Medium of Instruction

'Medium of Instruction' as a technical term in education is used when the language of instruction in class is not that of the mainstream society. Non-language content subjects are taught through an L2 (Baetens Beardsmore 2013: 457).

The UNESCO Education Position Paper also provides a definition for 'Medium of Instruction':

The language of instruction in school is the medium of communication for the transmission of knowledge. This is different from language teaching itself where the grammar, vocabulary, and the written and the oral forms of a language constitute a specific curriculum for the acquisition of a second language other than the mother tongue. (UNESCO 2003: 16)

Teaching content through L2 has been practised for a much longer time than is reflected in the volume of research about it. Students in monolingual education systems have been taught through an L2 with varying degrees of success. Researchers took an interest in education through L2 only after it became apparent that studying languages as a subject did not achieve the desired degrees of second language proficiency. The time spent on L2 as a subject in the syllabus was either not long enough, or was not spent in such a way that it was contributive to language acquisition. Baetens Beardsmore (2013) claims that:

[t]he majority of children receiving education in a monolingual school environment, levels of attainment in a second or foreign language are still poor and not commensurate with the time and effort devoted to language in the **syllabus**. (Baetens Beardsmore 2013: 458, original emphasis)

Many MOI programmes are modelled on the 1970s model that was implemented in Canada where English-speaking children were immersed in French in order to become better equipped for the Canadian job market. This was an early immersion model in which children were immersed exclusively in French from a very young age, gradually switching to English-medium instruction as they progressed through their education, until approximately half of the curriculum was taught in French and half in English (Johnson & Swain 1997b: 2-3).

Some MOI programmes have appropriated the label 'immersion', but have been used to immerse students with minority backgrounds in the majority language. These programmes have not been very successful as children who were immersed in the language of their host community did not have an established knowledge of their L1 and therefore did not achieve satisfactory results in language and content acquisition (cf. Hernandez-Chavez 1984).

MOI programmes aim for increased language proficiency while maintaining achievement in content subjects. A successfully implemented MOI programme will achieve these goals. The exposure to the language increases when more classes are taught through an L2. The success can be explained by the nature of the language used in content class as it is more authentic than classes in which the language is taught as a subject in the sense that in content class it serves a communicative purpose; i.e. when using the language in class, students get immediate results and can evaluate the success of their language use. Teachers and students alike use the language in class to achieve linguistic communicative goals and get a response to their actions (Baetens Beardsmore 2013: 460). The popularity of such programmes is easily explained in the view that bilingualism is a cognitive advantage (cf. Cummins 2001c) and that learners profit from bilingualism because it makes them more employable (Niemeier 1999: 182).

The English language in Hong Kong has been used in Hong Kong's schools and

society for more than 100 years, in which it has progressed from being the language of the coloniser to the means of distinction from Hong Kong's surroundings for some and the means of social advancement for all in the Special Administrative Region which has been returned to the PRC only some fifteen years ago. (Evans 2008b: 385).

Hong Kong's homogenously Chinese-speaking population has embraced English as their right and has reacted emotionally to the Firm Guidance policy of 1997 which made the use of Chinese as the MOI in schools obligatory. Schools protested and private EMI schools were overrun with requests for admission (Tse *et al* 2001: 11-12). The newly revised policy has been made more lenient toward the use of English in class as policy makers are afraid of declining levels of English proficiency in the populace and decreased interest in learning the language (cf. Lau 2009).

Hong Kong has long sought to balance the need for English in its service-based economy and its high status with the Chinese L1 of its students who were not able to follow lessons in the full-immersion EMI classrooms. With the change of MOI, the *de facto* status of languages in class also became the *de iure* status as previously supposedly EMI classes were conducted in a mixture of English and Chinese, which was deemed detrimental to students' acquisition of English and named one of the main causes for low English proficiency in Hong Kong students (Low & Lu 2006: 182). However, with the universities in Hong Kong still being EMI, the need for English did not fade, especially since students in CMI schools are faring worse at the university entrance exams, which is blamed on decreased exposition to the English language in schools (cf. Tsui 2007b).

Earlier EMI models were *de iure* late, full immersion classes where students would start full immersion EMI in junior high school, having previously been taught through CMI with English as a language subject from primary school onwards. With its new policy of allowing up to 25% of classes to be held in English in CMI schools, Hong Kong has shed the former full immersion model for a partial immersion one (Li & Majhanovich 2010: 25). The partial immersion model of L2 classes in a majority Chinese culture makes the Hong Kong MOI model appear like a CLIL model.

It should be taken into account that Hong Kong is a former British colony and as such carries a heritage of colonial EMI which it shares with many other former colonies around the world. Choi (2010) claims that:

[f]or many non-Western societies, decolonization in the post-war era entails, among other things, the rebuilding of national identity and confidence, and language reform naturally plays an important part in it. However, in Hong Kong, as in other former British colonies, English still remains the ‘power language,’ the usage of which signifies social and political power and status. (Pennycook 1995 in (Choi 2010: 236)

In the following sections, I will discuss the relevance of EMI in former British colonies and the impact it has had on their school system and society.

2.2. Relevance of EMI in former British colonies

The influence of English as well as the benefits and drawbacks of using it as a Medium of Instruction in schools is not a unique Hong Kong issue. It is an issue all former British colonies have to deal with in many ways. Many potentially difficult topics concerning English in the former colonies have sprung up not only from the practicality of English as an emerging world lingua franca in many areas like commerce, internet and diplomacy, but also from the leftover prestige which clings to English having been the language of the upper classes, the bureaucracy and the administration. The usefulness of being able to communicate in English globally is undisputed, but the prestige of the English language on a smaller scale (e.g. as a prerequisite for employment in lucrative jobs or as an official language within one country’s administration) in many former colonies seems often to be retained by a privileged few who have an interest in creating an artificial barrier, a veritable ‘glass ceiling’ between the “haves and have-nots” (Kan & Adamson 2010: 163), thus further perpetuating social inequality. As Muthwii & Kioko 2001 put it:

[t]here is a discrepancy between the assumed norms and the actual language behaviour (especially in the school system) [that] pose[s] various challenges to those involved in language education. (Muthwii & Kioko 2001: 206)

Despite all the drawbacks that immersion programmes that are implemented at the cost of the students' L1 have on their cognitive development and content acquisition, there is a demand for English-language education in many countries that have been under the British colonial rule. A study by the UNESCO shows that:

In regions where the language of the learner is not the official or national language of the country, bilingual and multilingual education can make mother tongue instruction possible while providing at the same time the acquisition of languages used in larger areas of the country and the world. This additive approach to bilingualism is different from the so called subtractive bilingualism which aims to move children on to a second language as a language of instruction. (UNESCO 2003: 18)

As every former British colony is different from another in many ways, there is little use in comparison between those countries, but it is interesting to point out how some of them are dealing with English as a Medium of Instruction within their curricula.

In the following paragraphs, I will narrow down the descriptions of MOI in former colonies to only a few examples, as it would by far surpass the scope of this paper to include all of them. Nevertheless, I find it important to add these, because while Hong Kong might possibly be one of the most prominent examples of what former colonies have to deal with concerning their MOI, it is not the only one.

2.2.1. Asia

The British Empire has had a long-standing interest in Asian trade, and the British influence was manifest in the foundation of the East India Company in the 17th century. The East India Company dominated the Indian trade and expanded farther into the East with the opium trade with China in the 18th century (which famously ended with the Opium Wars and the acquisition of Hong Kong) as well as the later colonisation of Java, Burma, Singapore etc. in the early 19th century (Ploetz 2001: 1186-1888; 1201-1215).

2.2.1.1. India

India is a country where approximately 200 languages are spoken. Hindi and English are used as official languages on federal level in most states. Fifteen more indigenous languages are used as official state languages, depending on the area. In education, 33 languages are used as Medium of Instruction across India, with several more made available for study in the curriculum. Most Indians who have been to school for at least four years are bilingual, if not trilingual. For most regions where Hindi is not the mother tongue, this means that people first learn the language which is spoken at home, followed by English as the second and Hindi as the third language. The percentage of schools where English is taught as first, second or third language in middle and secondary education is more than 90% (Annamalai 2004: 176-177).

Not unlike in Hong Kong, English has been made Medium of Instruction by the colonisers. At first, they sought to create middlemen who would act as intermediaries between the colonising elite and the colonised. As it became apparent that English was a means of social advancement, the demand for English increased. By means of downward filtration, the knowledge of English was passed on from the British to upper-caste Indians and eventually on to the lower castes. The colonisers tried to pass on some of their own culture and ideals of Enlightenment on to the colonised. This, however, was met with modest success, as English was mostly used for economic advancement (Annamalai 2004: 179-182).

Secondary and tertiary education in India gradually became almost entirely English-medium. Even after India's independence, English remained popular as Medium of Instruction, because "English-medium education continued to provide students with better educational and economic opportunities" (Annamalai 2004: 183).

Post-colonial India, led by Gandhi and Jawaharlal Nehru, who both received their tertiary education in Great Britain, continued to use English as Medium of Instruction. It was and still is claimed that with the multitude of languages used throughout India, English is the outsider language which no-one can claim as their mother tongue and therefore is neutral (Mahboob & Ahmar 2004: 1003). Higher

education across India remains English-medium, helping the elites to maintain their status. The process of downward filtration of knowledge continues. Admittedly, it is not always easy to provide mother tongue education for everyone without disadvantaging anyone, especially in Indian cities, where there is a large influx of people coming from many different ethnic and language backgrounds (Gupta 1997: 500-501).

There have been attempts by the government to change Medium of Instruction to indigenous languages at tertiary level, policies which have been formulated as to push the responsibility for the Medium of Instruction as far away as possible while indirectly putting the blame on schools and universities for failing to implement them. Vaguely formulated time frames, the lack of textbooks and translation of technical terms into vernaculars as well as a lack of teacher training in languages other than English have slowed down the implementation. Stronger attempts by way of legislation to change the Medium of Instruction from English to a vernacular have been met with animosity from the population, even with legal challenges, e.g. in Tamil Nadu, where the fear of overly strong Hindi influence is stronger than the perception of disadvantages of studying in an L2 (Annamalai 2004: 185-188).

2.2.1.2. Malaysia

Today's Malaysia is a country with a majority Malay population with noticeable minorities of Chinese and Tamil speakers. After independence from the British Empire in 1957, it was decided that Malay was to be used as the new official language, which then was actually put into effect in 1967 with the rise of Malay nationalists. Before that, English had been the official language, while Malay, Tamil and Chinese were considered vernaculars. The state language policy moved toward a Malay hegemony (Khemlani *et al* 2008: 126-129).

In 1970, a language policy which put great emphasis on the Malay language and culture was decided on. Malay was to replace English in schools, as well as at university level. The primary and secondary school examinations were to take place in Malay, and finally, the prerequisite to enter tertiary education, government jobs

and teacher training was a credit in Malay (Khemlani *et al* 2008: 126-129). While these measures were made in order to empower the Malays, the effect turned out to be quite the opposite of the policy makers' intentions. The language had not been developed so far as to have a vocabulary fit to express scientific ideas, and many English constructs were used, which did not improve understanding or clarity (Khemlani *et al* 2008: 130-131). The translation of course books and papers into Malay took a long time (*ibid*). Sargunan & Nambiar (1994) describe an instance in which law students, educated in Malay throughout their entire schooling actually prefer to conduct their education in English, because the textbooks are in English and studying in Malay would require additional translation work (Sargunan & Nambiar 1994: 106). Gill reports of the bifurcation of higher education – law students who have completed their degree in state universities normally did well in civil service, where the knowledge of Malay is required, while graduates of private English-medium universities did rather well in the private sector, where a working knowledge of English is required (Gil 2003: 146-147).

While the change to mother tongue education may not be detrimental to students' success but instead rather beneficial, the way in which the Medium of Instruction was changed seemed to drive the Malays into monolingualism. In addition, the colonial history did not endear the English language to the people, which made it difficult to manage the delay in the translation of books, which were still in English. Through the exclusion of other languages from the schools system in favour of Malay, ethnic Malays, so Musa (2001: 6, quoted in Khemlani *et al* 2008: 133) became monolingual, which put them at a disadvantage in comparison with the minorities in the country – the Chinese and Tamil speakers – who tended to be multilingual because they had to study in the majority language (Musa 2001: 6, quoted in Khemlani *et al* 2008: 133).

Khemlani *et al* (2008: 133-134) conclude that

[s]uch a bleak scenario could have been averted if the nationalists had understood the cognitive and social advantages of bilingualism. Their failure has resulted in depriving Malay graduates of their rightful place in the global economy and employment market.

This shows a different picture from that which can be seen in Hong Kong, where people generally tend to view English positively. Hong Kong nevertheless still has problems producing competent bilinguals. The English-medium dilemma in Malaysia continues, as it is in the country's interest to produce competent multilingual professionals. Nevertheless, in 2009, the Malay government has announced that by 2012, it will phase out a project in which English has been used as a Medium of Instruction in mathematics and science classes (cf. de Lotbinière 2009) and also (Pitman *et al* 2010: 5).

2.2.2. Africa

The British Empire's interest in Africa started in the mid-17th century with slaving expeditions by the Royal African Company which transported slaves from Africa to the Americas and the Caribbean to replace a dwindling native workforce (Ploetz 2001: 1128-1131). British interests in Africa clashed several times with Dutch interests, to which, among other things, an interesting pattern of colonial residue languages in Africa nowadays is owed (cf. Bowerman 2004).

2.2.2.1. Kenya

English was brought to Kenya by English-speaking settlers. At first it was not taught to the indigenous population, because – as seen in other colonial settings – keeping the indigenous population away from the language of power was perceived as a way of “retaining cheap labour” (Muthwii & Kioko 2001: 202) and holding the native population “down to a subordinate position socially, economically and politically” (ibid). The language was introduced in schools only in the early 20th century. After the Second World War, the English language became even more important and those wishing to participate in politics were required to know it; English became, even more than before, the language of upward mobility in Kenya. After Kenya's independence in 1963, the colonial language was at odds with local

vernaculars and Kiswahili and the tolerance for non-British variants of English increased (Muthwii & Kioko 2001: 204). Garcia points out that:

Kenya, with over forty different indigenous languages, the majority belonging to the Bantu family, developed a language education policy that uses “the language of the catchment area” (the school's neighbourhood) as a Medium of Instruction in the first three years of primary education, when English, which is studied as a subject from the beginning, becomes the sole Medium of Instruction. (Garcia 2009: 228)

So far, nothing suggests that there are efforts on the side of policy makers to install an indigenous language as a MOI in secondary schools in Kenya. The language issue is not addressed “except to advocate the status quo” and “insist on an exoglossic norm” (Muthwii & Kioko 2001: 208). The authors draw attention to the fact that despite policy makers’ proclamation that the language being used as MOI in class is the British English (Received Pronunciation) variety, research shows that “there are certain formal aspects of English which distinguish the Kenyan English from standard [...] varieties of English” (Zuengler 1982: 115) and this is the variety that is being used in schools and universities as MOI (cf. Muthwii & Kioko 2001).

2.2.3 EMI in former British colonies – summary

Although I have discussed only a few of the former British colonies, the issues mentioned here are common to most of them. India, Malaysia and Kenya are only a few of many countries left determine the best possible MOI in the wake of decolonisation. Studies from researchers in South Africa like Uys *et al* (2007), Brock-Utne *et al* (2010); from Singapore like Pakir (2004); studies from Tanzania by Brock-Utne, (2010), Rubagumya (1990), Bamgbose’s (1984) study about Nigeria, and many other countries show that the presence of a language that has become a world lingua franca causes issues which have to be taken into account when planning language policies for schools and universities.

After independence, former British colonies have come to understand English as their heritage and an advantage in the world market. The language becomes an asset locally and internationally, and a tool of social advancement (Annamalai 2004:

179-182). Policy makers are pressed to introduce an increased amount of L2 in the local school curriculum to the point that full immersion schools are the most popular form of education despite the drawbacks inherent to a curriculum entirely in L2. However, putting English above all in the curriculum leads to neglect of content subjects and even the L1 (cf. Cummins & Swain 1986).

The knowledge of English is used to distinguish those who speak the language and those who not, which then in turn leads to elite building. The elites are, of course, not interested in sharing their status with those who do not have it, so changes in policy toward models that benefit learners are slow and have to satisfy policy makers, the economy and the society (cf Kan & Adamson 2010).

Another issue that is found in many, if not all former British colonies is the use of exoglossic norms, native-speaker models that are far removed from the students' everyday language use. Kirkpatrick (2007) calls for policy makers and the society in general to let go of unrealistic expectations in language acquisition and to define attainable goals for themselves (cf. Kirkpatrick, 2007).

These are just some of the issues that former British colonies have to face in respect to their shared language. To overcome them, they need to reflect on the value of their respective L1 for education and society. It is also important to reconsider the value of English, whether a native-speaker norm must be achieved at all costs and whether the use of a nativised variety in schools is a realistic and useful option for former British colonies.

2.3. CLIL

Content and Language Integrated Learning (CLIL) is a term that encompasses the multitude of foreign/second language programmes offered by schools and universities in Europe. Marsh points out that:

[t]he term Content and Language Integrated Learning (CLIL) was adopted by European experts in 1996 as a generic 'umbrella' term to refer to diverse methodologies which lead to dual-focused education where attention is given to both topic and language of instruction. It is used to describe any educational situation in which an additional [...] language is used for the teaching and learning of subjects other than the language itself. (Marsh 2006: 29)

According to Dalton-Puffer, CLIL "refers to educational settings where a language other than the students' mother tongue is used as Medium of Instruction" (Dalton-Puffer 2007: 1). The term CLIL – Content and Language Integrated Learning –, adopted in Europe in 1994 (cf. Marsh *et al* 2001) is used within:

[t]he European context to describe and further design good practice as achieved in different types of school environment where teaching and learning takes place in an additional language" (Coyle *et al* 2010: 3).

It has become a term most commonly associated with immersion programmes in European secondary and tertiary education. Not unlike in Hong Kong, where English is the only L2 option for immersion classes, most European institutions involved in CLIL offer English as their MOI, with French and German being second and third respectively (Eurydice 2006: 17). Although English is the most common vehicular language, Anderson (2008) and (2009) reports of increasing signs of CLIL being adopted for languages other than English.

The main goal of CLIL classes is – as the name says – Content and Language Integrated Learning. The idea behind CLIL is that if the content is taught through an L2, the language learning will come naturally, as the learners' attention is diverted from the forms of the language to the "things accomplished and meanings conveyed through language" (Dalton-Puffer 2011: 195). CLIL is a late immersion programme, as it usually starts in secondary education, especially if the CLIL MOI is a foreign language and not a minority or heritage language. (Eurydice 2006: 20). CLIL classes are classes where content subjects are taught through L2, while the rest of the subjects are taught through the students' L1. It allows for a gradual shift and, in the best of cases, will result in the students' increased proficiency in the L2:

[A]chieving this twofold aim calls for the development of a special approach to teaching that the non-language subject is not taught *in* a foreign language but *with* and *through* a foreign language. (Eurydice 2006: 6, original emphasis)

There are multiple uses for CLIL programmes in respect to language learning: strengthening of bilingualism, increasing potential mobility of citizens in multilingual economic units such as the EU, upholding the status of minority languages and the languages of the neighbouring states, as well as reviving endangered languages such as Welsh (Eurydice 2006: 16-17).

Owing to the number of languages spread over a relatively small area, European schools and universities should be able to offer immersion programmes in a wide range of languages, for example courses in languages of local minorities or those of neighbouring countries. The benefit of these should be obvious – lowering of linguistic and cultural barriers within a society as well as contributing to understanding across immediate borders, increased tolerance and economic benefits. Despite these advantages, the majority of all immersion programmes in Europe are offered in English and other high prestige languages like French and German (Eurydice 2006: 18-19). This is an indicator of the policy-driven nature of CLIL programmes: there are still few opportunities to learn through languages that are not as highly regarded as English, because they are perceived as less ‘useful’.

Apart from integrating content and language, CLIL programmes are said to have a positive effect on cognitive processes in students, as the CLIL approach requires the students to develop new ways to understand content and solve problems in another language. Cummins claims that:

[t]here is also evidence that exposure to an immersion or bilingual education program, in addition to promoting high levels of functional bilingualism, might positively affect some cognitive processes. (Cummins 2001c: 30)

The focus on cognitive processes is supported by research in the neurosciences. This approach – the use of technology, e.g. functional magnetic resonance imaging – has helped gain further insight into the workings of a multilingual brain (cf. Marsh & Hill 2009). For an approach that is as new as CLIL and has not yet had the time to

establish good practice standards, the research results from the neurosciences are an additional means to establish solid methodological approaches, something that is urgently needed in CLIL (cf. OECD 2007).

CLIL has faced a number of challenges throughout its brief history, two of them being curriculum development and teacher education. The integrative nature of CLIL programmes affords the teachers to be able to teach two subjects at once – a content subject and a language. Initiatives for teacher education before service and in-service have developed only recently, as the integrative approach needs innovative teaching practice which diverges from traditional teacher training as it has been done until now (Marsh & Langé 2013: 148). Researchers such as Marsh *et al* (2010) are working on a common framework for a CLIL teacher education which is supposed to serve as a non-prescriptive guide for professional education of CLIL teachers. While teacher training is, albeit slowly, coming along, the curricula for CLIL in class vary widely. Teaching materials are rare and teachers are left to their own devices when it comes to designing a CLIL curriculum for their CLIL classes (Ziegelwanger 2007: 306).

One of the sources of information for the concept of CLIL can be found at the CLIL Compendium online, which offers a definition of CLIL in which it is divided into dimensions which are meant as an explanation of the concept for teachers. There are five dimensions which are “based on issues relating to culture, environment, language, content and learning” (cf. CLIL Compendium 2004). The dimensions are idealised in the sense that in the case of implementation in CLIL programmes, “it is likely that a school will wish to achieve successful outcomes in relation to more than one dimension at the same time” (ibid). The dimensions of CLIL are subdivided into several points which can serve as a pointer to possible foci for CLIL programmes, as can be seen in the following list:

1. The Culture Dimension [...]

- A. Build intercultural knowledge & understanding
- B. Develop intercultural communication skills
- C. Learn about specific neighbouring countries/regions and/or minority groups
- D. Introduce the wider cultural context

2. The Environment Dimension [...]
 - A. Prepare for internationalisation, specifically EU integration
 - B. Access International Certification
 - C. Enhance school profile
 3. The Language Dimension [...]
 - A. Improve overall target language competence
 - B. Develop oral communication skills
 - C. Deepen awareness of both mother tongue and target language
 - D. Develop plurilingual interests and attitudes
 - E. Introduce a target language
 4. The Content Dimension [...]
 - A. Provide opportunities to study content through different perspectives
 - B. Access subject-specific target language terminology
 - C. Prepare for future studies and/or working life
 5. The Learning Dimension [...]
 - A. Complement individual learning strategies
 - B. Diversify methods & forms of classroom practice
 - C. Increase learner motivation
- (CLIL Compendium 2004)

The definitions and explanations of the concept serve as an introduction to the concept, and the project rationale proposes that it “aims to be comprehensive but not exhaustive” (CLIL Compendium 2004).

This type of immersion education is popular because it promises good and inexpensive results in efficient language learning. It is a “new sports car in the [...] education system that [...] educationalists want to possess” (Ziegelwanger 2007: 292). Marsh and Langé (2013) claim that CLIL takes the sole responsibility for language learning off the educators’ shoulders and at the same time makes content and language acquisition visible and understandable to stakeholders, who in turn are more willing to take seriously a construct as popular as CLIL and act on its behalf in their function as decision makers and gatekeepers (Marsh & Langé 2013: 148). While the latter might be true, there is evidence that although CLIL is a popular concept, the burden of curriculum planning and composition of course materials often falls to the teachers offering CLIL programmes (Coonan 2007: 628).

CLIL is a popular and way to include language immersion in content subjects and develop additional cognitive skills, but as this field of research is still young, the

base from which curriculum planning and teacher training for this area can build is still limited.

3. Commonalities and differences between MOI (EMI) and CLIL

In this section, I will examine the differences and commonalities between EMI (Hong Kong) and CLIL (Europe). This will show whether both concepts have similar points and issues, and whether they can be compared in order to use each other's experience and research results to solve the issues both have.

3.1. Benefits and drawbacks of immersion

The goals of immersion are language acquisition, the students' improved cognitive development and educational advantage which allow the multilingual individual to choose between his or her languages and ultimately make him or her more adaptable and employable. The UNESCO resolution (1953) as well as Cummins & Swain (1986) point out that the use of the mother tongue is beneficial to the students because content is easiest acquired in the first language.

Gupta (1997) points out that using the mother tongue may be beneficial for the students, but in some circumstances there is little choice for the teachers than to teach in a language that is known to all: "it is not practicable to expect that every language group, however small, can be provided for [...]" (Gupta 1997: 498). Of course, there have also been findings to the contrary:

It has been recommended that education should be provided in mother tongue, "even where the mother tongue or first language is not the national or official language and even where the first language has no other function in the larger society." (Eastman 1983: 83, quoted in (Yan, J. X. 2001: 1-2)

Gupta makes a difference between educationalists' decisions in a city and those in the country. To demonstrate further, she sketches an imaginary mega-city, in which the language background of its denizens is much more varied than that of the people living in linguistically homogenous communities in the country (Gupta 1997: 499). In India, where students in one class may come from as many different language backgrounds as there are students, English presents itself as a good choice

of MOI, for it enjoys high prestige among prospective employers and can also – since it is the language of the former colonial power – be perceived as fairly neutral in comparison to other Indian languages:

In a regional setting, the status of Hindi vs. Dravidian languages of South India in post-colonial India [...] has been a cause of strife [...] As a result of this politicization of local languages, English, because of its 'foreignness', has been preferred as a neutral language and gained local acceptance. (Mahboob & Ahmar, 2004, p. 1003)

This reasoning need not necessarily be true of every large city. Hong Kong, for all its size, has a staggering percentage of 90,8 per cent of Cantonese speakers and can thus be viewed as linguistically homogenous (Lee & Leung 2012: 11). A large number of people migrating to Hong Kong originate from the Chinese mainland. They bring their own language with them, which happens to be Cantonese as well. Using English as a Medium of Instruction in Hong Kong does not come from conciliatory motives, since most students are native Cantonese speakers.

There are instances, as summarised by Johnson & Swain (1997a), where immersion education can be beneficial, as well as those where it is not very helpful:

Under conditions favourable to immersion, claims based on research have gone beyond additive bilingualism to include cognitive, cultural, and psychological advantages. Under less favourable conditions, doubts have arisen concerning the potential of immersion programs to achieve full additive bilingualism. (Johnson & Swain 1997b: 15)

It is in the hands of policy makers, educationalists and researchers as well as stakeholders like parents and the proponents of economy to determine ways in which immersion education can be implemented to the benefit of those who are enrolled in this type of education.

3.2. Immersion education

Teaching and learning in a language which is not that of the local community is not a singular phenomenon that only occurs in Hong Kong, nor is it an invention of post-

colonial societies. An attempt to gain educational advantage through additive bilingualism is a goal many immersion programmes around the world share.

In their book *Immersion Education: International Perspectives* (1997a), Johnson and Swain offer a valuable account of some of these immersion programmes. They also propose a list of criteria which could be used to identify an immersion model or to determine whether a model of education already in use is an immersion education model or not. Right at the start, they clarify that immersion education is not equal to bilingual education, but rather that it is a “category within bilingual education” (Johnson & Swain 1997b: 1).

As claimed by (Lewis 1976, quoted in Johnson & Swain 1997b: 1) immersion education is by no means an invention of the 20th Century. Teaching and learning in a FL was not implemented primarily for the benefit of the students, but rather because:

[u]ntil the rise of nationalism, few languages other than those of the great empires, religions, and civilizations were considered competent or worthy to carry the content of a formal curriculum. (Johnson & Swain 1997b: 1)

After the de-colonisation, when the newly independent countries that emerged from Spanish, British, French and Portuguese colonies could not reach an agreement on their national language, they would use the language left behind by the colonisers, which had two great advantages: it was mostly a prestigious language, and it was perceived as ‘neutral’ (ibid). Johnson and Swain (1997b: 4-6) name several reasons for the implementation of immersion programmes: Immersion in a FL, which serves many purposes, e.g. economic imperatives, as seen in the Japanese and Mandarin immersion programmes in Australia. There are immersion programmes in a minority language for students coming from majority language backgrounds. Immersion programmes can be implemented to promote additive bilingualism, e.g. a Swedish immersion programme in Finland. Immersion serves to support language revival, e.g. the Ukrainian and Cree immersion programmes in Canada, and immersion in a language of power, where the use of L2 is perceived as so great that it is preferred above the L1 for educational purposes, e.g. in Singapore and Hong Kong (Johnson & Swain 1997b: 4-6).

3.2.1. Core features of an immersion programme

Johnson & Swain identify eight “core features of a prototypical immersion program” (1997b: 6-8). These defining features, as they claim, would be found in programmes that

[i]n terms of social context, curriculum, pedagogy, and teachers’ and students’ characteristics, implements each of these features to the fullest. [...] By matching programs against these features, bilingual educators can determine, trivially, the extent to which their program is an immersion program as defined here, and less trivially the kinds of opportunities, constraints, and problems a program that matches these criteria might face as a consequence. (Johnson & Swain 1997b: 6)

The eight core features are as follows:

1. The L2 is the Medium of Instruction
 2. The immersion curriculum parallels the local L1 curriculum
 3. Overt support exists for the L1
 4. The program aims for additive bilingualism
 5. Exposure to the L2 is largely confined to the classroom
 6. Students enter with similar (and limited) levels of L2 proficiency.
 7. The teachers are bilingual
 8. The classroom culture is that of the local L1 community
- Johnson & Swain (1997b: 6-8)

Johnson and Swain also identify some variable features of immersion programmes, which can, but need not be part of the programme and vary from one immersion programme to another:

1. Level within the educational system at which immersion is introduced
 2. Extent of immersion
 3. The ratio of L1 to L2 at different stages within the immersion program
 4. Continuity across levels within education systems
 5. Bridging support
 6. Resources
 7. Commitment
 8. Attitudes toward the culture of the target language.
 9. Status of the L2
 10. What counts as success in an immersion program
- Johnson & Swain (1997b: 8-11)

To determine whether the Hong Kong school system is in fact immersion education, one has to look at whether the Hong Kong immersion programme manifests all the

core features. For the purposes of this thesis, only the core features of immersion programmes will be discussed, because while the variable features are important for individual programmes in which they occur, as they carry implications for administration and planning, pedagogy and the results of an individual programme, they may not be important for another programme, which would make comparison difficult (Johnson & Swain 1997b: 8).

Johnson explores the Hong Kong school system and its gradual shift from a universal late immersion programme to one that suits the needs of the students better, in which the number of English-medium schools is reduced and “the schools that claim to be English-medium actually are [English-medium]” (Johnson 1997: 167-168).

3.3. English-medium instruction in Hong Kong – an immersion programme?

The easiest way to determine whether Hong Kong has adopted an immersion programme according to Johnson and Swain (1997b: 6-8) for their schools is to look at its proposed core features and decide whether they apply to Hong Kong’s education system. This however, is only a general overview, because this model has clearly been made to work on a smaller scale and cannot readily be used to determine whether a whole education system can be called an immersion programme. Nevertheless, I believe that the features of the Johnson and Swain model can be useful in determining whether the English-medium instruction in Hong Kong is an immersion programme.

1. The L2 is the Medium of Instruction

Officially, English is the Medium of Instruction. It used to be reserved for a small elite needed to run the administration for the colonisers, while expatriates did not usually learn Chinese. When demand for English-medium education rose, the education system did not have a policy concerning the Medium of Instruction, and the government delegated its choice to the schools. The schools were pressured

into offering an increasing number of English-medium programmes which were English-medium only in name (Johnson 1997: 172-173). It can be said that the *de iure* MOI was English and *de facto* it was, in great parts, Chinese, which may change with the new policy Fine-tuning which allows for some English-medium lessons in otherwise CMI schools (cf. Kan *et al* 2011).

2. The immersion curriculum parallels the local L1 curriculum

Given the status of English as the almost universal language of education in Hong Kong's secondary schools before the Firm Guidance (1998), the majority of schools had only one curriculum, which was the "local curriculum", and was delivered to the students in a mixture of Chinese and English. This way, one cannot really speak of two parallel curricula but of only one curriculum that was valid for all students.

3. Overt support exists for the L1

From junior secondary school onwards, Chinese language and history were taught in Chinese, while all other subjects were taught through English. The reform that came with the change of administration and the return of Hong Kong to China was supposed to help maintain the students' Chinese-language development and their academic record in Chinese, while at the same time promoting English, though "not at the expense of academic achievement in and through Chinese" (Johnson 1997: 174). The policy Fine-tuning promises overt support for Chinese while not failing to mention that it wishes to strengthen English in the population (cf. Kan *et al* 2011).

4. The program aims for additive bilingualism

Schools in Hong Kong are primarily teaching their students English in order to provide the economy with enough English speakers. Since the change of sovereignty, Putonghua has become increasingly important and there is a certain pressure on Hong Kong to encourage the learning of Putonghua, not only because Putonghua is supposed to be the great national language of PRC, but also because it is becoming an important lingua franca in the region. The Hong Kong model was meant to produce bilingual graduates, but does not longer aim only for additive bilingualism (cf. Li, D. C. S. 2009):

[b]eing able to speak English and Putonghua/Mandarin fluently will be an important asset for anyone preparing for a professional career in the multilingual workplace. This is why English and Putonghua figure so prominently in the SAR's language-in-education policy of 'biliteracy and trilingualism' (Li, D. C. S. 2009: 76).

After having finished school in Hong Kong, students are supposed to be able to speak Cantonese, English and Putonghua and write in English and Modern Standard Chinese. This programme certainly aims for additive bilingualism, although it has been criticised for pursuing somewhat unattainable goals like native-speaker models at the cost of all other subjects, among them the mother tongue (Kirkpatrick 2007: 377).

5. Exposure to the L2 is largely confined to the classroom

English has been brought to Hong Kong by colonisers and has proven useful, but its linguistic distance from Chinese and its origins have not made it entirely at home in Hong Kong. While an increasing number of people in Hong Kong consider themselves bilingual and are, by learning Putonghua, moving towards trilingualism, they still do not start out with English as a household language. As Johnson puts it, "[b]ecause of the ubiquity of Cantonese in Hong Kong Chinese community, the vast majority of Hong Kong children grow up with little or no contact with English outside the classroom" (Johnson 1997: 173). Therefore it can be said that the English language in Hong Kong is confined to the classroom.

6. Students enter with similar (and limited) levels of L2 proficiency.

Since the exposure to L2 is largely confined to the classroom and most Hong Kong children grow up with Cantonese as their first language (ibid), it can be concluded that their knowledge of English is limited. Most primary schools use Chinese as their Medium of Instruction, English is taught as a language subject rather than being used to teach. The policy makers and proponents of economy bemoan the low levels of English in schools and the society alike (Balla & Pennington 1996: 57). For this reason, the levels of L2 proficiency in schools can be assumed to be limited for the majority of students when they enter an EMI programme.

7. The teachers are bilingual

Teachers in Hong Kong are bilingual in the sense that they have been educated at English-medium universities and have completed their studies in English. Hong Kong teachers in general find teaching in English as easy as teaching in Chinese and sometimes prefer to teach in English, because they had been taught in English as well and suspect that there were no satisfactory textbooks in Chinese (Tung P 1989: 59-60). This might have changed since the takeover, as there has been time to translate old textbooks into Chinese or write new ones. At the same time, many studies document that the teaching in supposedly English-medium classes tends to shift to Chinese to varying degrees in order to make the students understand and participate in class activities (cf. Shek *et al* 1991) and (cf. Johnson 1983). Native English speakers are employed in order to aid with teaching of English (Forrester & Lok 2008: 4). Nowadays, teachers' L2 proficiency is tested through the *Language Proficiency Assessment for Teachers* (LPAT) (cf. Education Bureau 2012). It can be said that teachers in Hong Kong generally fulfil this criterion, except perhaps for native speaker English teachers who are employed under the NET scheme.

8. The classroom culture is that of the local L1 community

Hong Kong has developed a sense of its own identity during the colonisation and has a culture which is clearly distinguishable from the cultures of the colonisers, but also somewhat different from that of mainland China. While this may change with the influx of Chinese from the PRC, so far the culture of HKSAR remains distinguishable from that of its neighbours and colonisers. As found before by Shek *et al* (1991) and Johnson (1983), the main language actually spoken in class seems to be Chinese. Therefore, and also because Hong Kong schools all embrace EMI as their MOI at least partially and English in the classroom is not restricted to elite schools, it can be concluded that the classroom culture in Hong Kong is generally that of the local L1 community.

3.3.1. Is Hong Kong EMI immersion – outcome

From the facts gathered in previous sections, it is fairly safe to say that Hong Kong English-medium schools were *de iure* immersion programmes. The same still holds true for the Hong Kong secondary schools in the English-medium stream since 1997 (cf. Evans 2009). The policy Fine-tuning expands the immersion time in CMI secondary schools to up to 1/4 of the curriculum (cf. Li & Majhanovich 2010). This changes Hong Kong's immersion model from a full immersion model to a partial immersion model (cf. Johnson & Swain 1997b).

3.4. CLIL – an immersion programme?

Determining whether CLIL is in fact an immersion programme is not as straightforward as in the case of Hong Kong/EMI, because, as already determined in section 2.3., CLIL is an umbrella term encompassing the many foreign and second language programmes offered in European schools and universities. What follows is a theoretical model assuming an ideal secondary education CLIL programme, which I have aligned with the Johnson & Swain's (1997b: 6-8) list of core features of an immersion model for comparison.

1. The L2 is the Medium of Instruction

CLIL programmes are held in languages that are not the learners' L1.

CLIL refers to situations where subjects or parts of subjects are taught through a foreign language with dual-focused aims, namely the learning of content and the simultaneous learning of a foreign language. (Marsh *et al* 2002: 15)

This does not say anything about how L2 is used in class and how immersion time is spent in practice. Nevertheless, there is a clear intention to use L2 to teach content to students and therefore it can be concluded that the MOI in CLIL programmes in general is L2.

2. The immersion curriculum parallels the local L1 curriculum

It is the aim of CLIL programmes to teach subjects through other languages. The students are supposed to acquire additional cognitive skills and the same amount of content as their counterparts in non-CLIL programmes. This issue has been researched from the linguistic point of view, but there has been a lack of longitudinal research for both the content and the language acquisition. It can be concluded that in principle CLIL is intended to develop language skills and follow the local L1 curriculum, but that there is need for further research to confirm whether the principles translate to good practice (Coyle *et al* 2010: 165).

3. Overt support exists for the L1

As CLIL models mostly are not meant as full immersion models, the subjects not taught in L2 are presumably taught in L1, thus ensuring support for L1. Most CLIL programmes start with secondary education (Eurydice 2006: 20), among other things in order to ensure that the students have sufficient knowledge of their L1 before they start studying in another language (cf. Hernandez-Chavez 1984).

4. The program aims for additive bilingualism

CLIL programmes in Europe aim for additive bi- or multilingualism. Eurydice claims that, depending on the country, CLIL programmes attach importance to:

- preparing pupils for life in a more internationalised society and offering them better job prospects on the labour market [...]
- conveying to pupils values of tolerance and respect vis-à-vis other cultures, through use of the CLIL target language [...]
- enabling pupils to develop:
 - language skills which emphasise effective communication, motivating pupils to learn languages by using them for real practical purposes
 - subject-related knowledge and learning ability, stimulating the assimilation of subject matter by means of a different and innovative approach.

(Eurydice 2006: 22)

Eurydice's data supports the claim that CLIL programmes in Europe generally aim for additive bilingualism. It is also important to add that CLIL programmes have

driven research from being focused only on the acquisition of language and content to research of the development of additional cognitive and problem-solving skills which emerge through learning through L2 (cf. Mehisto *et al* 2008).

5. Exposure to the L2 is largely confined to the classroom

Depending on the form of CLIL, the exposure to the L2 can be confined to the classroom, as in areas where the general populace is largely monolingual. In areas where CLIL is used to teach minority or regional languages, this may not be the case as the L2 may be the household language for some of the students and may be spoken widely in the area. Lasagabaster and Sierra argue this to be one of the greatest obstacles to declaring CLIL programmes immersion (Lasagabaster & Sierra 2009: 369). However, for the majority of CLIL programmes it can be said that the exposure to the L2 is confined to the classroom, especially since most of the CLIL programmes that are being implemented in parts of Europe in which English is not the mainstream language are English-medium (Eurydice 2006: 17-8).

6. Students enter with similar (and limited) levels of L2 proficiency

In areas where the CLIL language is a minority or regional language, the L2 proficiency levels may not be the same as in places in which the language levels reached are owed only to previous instruction in schools. In general, CLIL programmes “endeavour to develop the language skills of students who have had traditional foreign language teaching throughout their primary education” (Lasagabaster & Sierra 2009: 371), so it can be said that most enter CLIL programmes with similar, limited levels of L2 proficiency.

7. The teachers are bilingual

While the students’ language proficiency may vary, and despite the lack of uniform qualifications and recruitment criteria throughout Europe, Eurydice has found out that in most parts of Europe, teachers are required to be proficient in the L2 in order to teach content subjects in that language. Some countries require the teachers to be qualified in teaching both the content subject and L2, some require a

diploma testifying to knowledge of both L1 and L2, and for some a certificate of L2 proficiency is needed (Eurydice 2006: 42-44). L2 proficiency is a criterion that teachers aiming to teach CLIL classes have to fulfil.

8. The classroom culture is that of the local L1 community

Unlike Hong Kong, European countries do not look back on a history of colonisation. The languages taught as L2 in European classrooms have found their respective niches because of their usefulness or because they are minority or regional languages. With the desired increase of linguistic diversity in Europe and an increasingly multilingual society owed to migration (Coyle *et al* 2010: 157), the outcome (albeit perhaps in a far future) could well be that defining a community language is neither easy nor straightforward. So far, in most countries in which CLIL is implemented not for the advancement of minority or regional languages (cf. Lasagabaster & Sierra 2009) but for additive bilingualism in a largely monolingual society, the classroom culture is that of the local L1 society.

3.4.1. Is CLIL immersion – outcome

While it is not as simple to determine as in the case of Hong Kong's EMI whether CLIL is an immersion programme or not, it can be said, with reservations, that CLIL in its most basic form can be termed immersion. Lasagabaster & Sierra (2009) and Ting (2011) argue that, in their opinion, CLIL which involves regional and/or minority languages cannot be called immersion because the language is not clearly enough an L2 for the students. However, Lasagabaster and Sierra (2009) use their own model which does not entirely correspond to Johnson & Swain's (1997b) list of core features of an immersion programme. When using the latter, I must conclude that CLIL is, in most cases, a late immersion model and therefore comparable to the Hong Kong EMI model.

4. The historical backgrounds of CLIL and EMI

In this chapter, I will look at the historical backgrounds of CLIL in Europe and EMI in Hong Kong. While the history of CLIL in Europe has been far shorter than that of EMI in Hong Kong, it has been eventful because of the speed with which the practical use of CLIL has outgrown the research, which now has to catch up to supply theoretical grounding for CLIL curricula and teacher training respectively. Hong Kong's EMI has progressed from the language of the colonising force to a coveted commodity and a means of social advancement in Hong Kong society, through several policy changes and a discussion of the worth of L1 versus L2 education.

4.1 The historical background of CLIL

The history of Content and Language Integrated Learning (CLIL) programmes in Europe has been much shorter than that of EMI programmes in Hong Kong. The provision of immersion type teaching through L2 was practised in Europe before the 1990s, but only in 1994 was the term coined by researchers at the University of Jyväskylä in Finland and the European Platform for Dutch Education and CLIL became widely used in Europe by 1996 (cf. Fortanet-Gómez & Ruiz-Garrido 2009).

Before it became known as CLIL, teaching of certain subjects within the curriculum in foreign, regional or minority languages was mostly only offered in parts of Europe that were “linguistically distinctive”, such as border areas, or in big cities (Eurydice 2006: 7). The aim of such programmes was to help students acquire near native-like proficiency in languages.

The Canadian model has been particularly influential in the field of foreign language teaching through immersion. Here, from the 1970s on, English-speaking families in Quebec aimed to offer their children more immersion in the French language, as to better equip them to live and work within a French-speaking community. The

success of the programme was so impressive that it gave rise to further research into immersion models. While by no means entirely transferable, it helped shape the beginnings of immersion programmes in Europe (Johnson & Swain 1997b: 2-3).

Studies show that immersion education in which L2 is integrated with content can achieve better levels of L2 knowledge than those where L2 is studied only as a subject (cf. Genesee 1994). Many researchers warn that the unique quality of CLIL provision is rooted in its sociolinguistic and sociocultural context and cannot be simply transferred to other models (cf. Gallardo del Puerto *et al* 2009). However the comparison of commonalities and differences in section 3 of this thesis shows that most basic factors are shared between CLIL and other forms of immersion education, such as EMI in Hong Kong.

As discussed in section 3.4., most types of CLIL provision can be called immersion programmes. Immersion can be ‘early’ or ‘late’, ‘partial’ or ‘total’, depending on the students’ ages and the extent of the immersion. It can be immersion in a language of power for minority students or vice versa, immersion in a minority language (Johnson & Swain 1997b: 8-12). What we used to see in Hong Kong is normally termed ‘late total immersion’, while now the majority of lessons is held in Chinese with policy makers considering to allow some lessons to be held in English and generally leaning towards allowing more EMI in classes (Kan & Adamson 2010: 2-3).

The CLIL concept is supposed to lead to more than increased language proficiency – it is supposed to equally stress both the content and the language in which it is taught. This approach requires new concepts in teaching:

[a]chieving this twofold aim calls for the development of a special approach to teaching that the non-language subject is not taught in a foreign language but with and through a foreign language. This implies a more integrated approach to both teaching and learning, requiring that teachers should devote special thought to not just to how languages should be taught, but to the educational process in general. (Eurydice 2006: 7)

CLIL is lauded as a simple way of increasing the exposure to a foreign language in situations that require genuine interaction. It does not require the schools to provide for more time for language lessons and theoretically it does not require

additional staff, either. According to Pérez Cañado (2012), there have been two main reasons for the growth of CLIL in Europe: „reactive reasons” and “proactive responses” (Pérez Cañado 2012: 315). Reactive reasons were those that aided the strengthening of foreign language competence where this was needed and proactive responses were supposed to create an environment conducive to Europe’s push for multilingualism (Pérez Cañado 2012: 315-316). It is the fourth general objective of the European Union White Paper of 1995 that all EU citizens should be proficient in three Community languages (European Union 1995: 47), and CLIL is supposed to aid in achieving this goal by providing an efficient way to increase immersion time.

By 1996, first bilingual programmes were launched in Germany and the UK, and in 1998, there were bilingual programmes in The Netherlands and Finland as well. This was followed by dissertations such as *Vreemde taal als instructietaal* by Rymenans & Decoo (1998) (PhD, University of Antwerp, Belgium) in 1998 and *The International University Curriculum – challenges in English-medium engineering education* by Klaassen (2002) (PhD, University of Delft, Netherlands) (CLIL Compendium 2004). The AILA (International Association of Applied Linguistics) Special Interest Group which is concerned with CLIL issues and research was established in 2000 (cf. Dalton-Puffer, Nikula, & Smit 2011).

In 2001, the CLIL Compendium was launched, an online resource which aims to provide information, links and references about CLIL. Their understanding of CLIL includes the division of the term into five dimensions: the Culture Dimension, the Environment Dimension, the Language Dimension, the Content Dimension, the Learning Dimension (CLIL Compendium 2004). The aim of this project is to serve as “a foundation by which to build greater understanding of the potential of CLIL” (CLIL Compendium 2004).

In 2002, the CLIL/EMILE report was published, which provides an extensive overview of language teaching and learning across Europe with focus on immersion education. The report discusses the implementation of language teaching through content and content teaching through language, the importance of achieving the

European goal of citizens being able to speak their mother tongue and two additional languages and the threat to the L1 through foreign languages, which can be averted through conscious curriculum planning which includes both strengthening of L1 and conscious limitation of L2 instruction in class (Marsh *et al* 2002: 9-11).

The CLIL Consortium was established in 2003. Its experts include, among others, researchers David Marsh, Hugo Baetens Beardsmore, Dieter Wolff, Peeter Mehisto, Do Coyle, Gisella Langé and María Jesús Frigols. The CLIL Consortium offers services such as expert studies and consultation on matters such as PISA, the Programme for International Student Assessment (OECD), the evaluation of projects in regional bilingual education and CLIL evaluation, consultancies and professional development (cf. The CLIL Consortium 2012).

David Marsh, Peeter Mehisto, Dieter Wolff and María Jesús Frigols Martín are also involved with the *European Framework for CLIL Teacher Education* (2010) which aims to provide a comprehensive framework for the professional development of educationalists wishing to teach through foreign languages. It “aims to provide a set of principles and ideas for designing CLIL professional development curricula” (Marsh *et al* 2010: 3) and to “serve as a tool for reflection” (ibid), but is not meant as a prescriptive template.

Taking a look into the future, Coyle (2010) foresees the growth of English, as already predicted by Graddol (2006). Although English is not as widely spoken as L1 as it is as a second or foreign language, the need for English will continue to grow and immersion programmes are expected to offer English in order to produce employable citizens (Coyle 2010: 155). At the same time, governments of Anglophone countries acknowledge that only English may not be enough for their countries (cf. Commission of the European Communities 2003), and the Eurydice report (2006:17) also identifies a number of languages other than English that are used as immersion languages across Europe, albeit in smaller numbers.

Increasing migration in and outside of Europe invites multilingualism in some communities and offers a threat of isolation for those who cannot adapt. *The CCN*

Foresight Think Tank Report. Talking the Future 2010–2020. Languages in Education emphasises the importance of lifelong learning, which is in many ways connected to the knowledge of languages, which in turn increases the importance of languages in education (Asikainen *et al* 2010: 4). As languages in the curriculum become ever more important, the development of linguistic teacher competences should become one of the focal points of policy planning in the future:

As educational practice builds on social connectivity, the development of communication competences becomes a shared responsibility across all disciplines. This requires re-drawing curricular parameters of teacher education so that every teacher supports language learning with respect to first, second, foreign, heritage, minority, regional, subject-specific, and digital languages. (Asikainen *et al* 2010: 4)

The ideal, multilingual teacher who can teach content in several languages can only be exist if there is a framework which can support the education of such teachers; these teacher can only provide the best CLIL programmes if there is a supportive curriculum as well as support mechanisms for them. These issues will be discussed more closely in section 5.

4.2. The historical background of English in Hong Kong

In this chapter I will provide the background which is needed to understand the way in which the MOI policy has been implemented in Hong Kong, along with a timeline. This chapter shows how the English language was implanted into Hong Kong – at first it was solely meant to be a tool of colonisation, but later proved to be a means of distinction from the former motherland and the Taiwanese Nationalists, as well as an economic asset on the global market. The language, most interestingly, while having been brought by a colonising force, was embraced by the pragmatic, mercantile society as an asset. While English was convenient and offered many advantages, the school system did not take into account the difficulties that are inherent to studying in a foreign language. I will also try to estimate the current value and the status of English in Hong Kong, ending with the current status quo of MOI policy in Hong Kong.

The following chapter will include a summary of the main events concerning the position of the English language in Hong Kong and its use in the former colony. This occurs simultaneously with the background of the growing influence of the English language globally as well as the rise of Putonghua as the local lingua franca in East Asia.

4.2.1. The British Empire

Hong Kong, as shown in section 2.2., is not a solitary phenomenon: a former British colony which still has to deal with the consequences of language and education policies inherited from the British Empire. Many other Asian countries, notably Malaysia, Singapore and India, and also African countries like Kenya and South Africa, still must devise strategies to satisfy the demand for English while at the same time providing the best education possible. The language situation in Hong Kong however is made even more interesting by Hong Kong's return to PR China and the precarious balance between English, Putonghua and Cantonese that can now be found in Hong Kong.

4.2.1.1. Early colonial Hong Kong

The first Opium War, a conflict between the British Empire and China, ended with the handover of Hong Kong to the British in 1842. Hong Kong became a British colony. With the new colonial rule, Hong Kong was to serve as a gateway for trade in South East Asia for the British Empire – the new administration needed an English-speaking Chinese elite which could act as interpreters and a link between the colonial administration (or themselves be the colonial administration) and the Chinese-speaking masses (cf. Pennycook 1998). As Tsui writes:

The aim, as blatantly stated by E. R. Belilios, a member of the Education Commission, was to anglicize the Chinese so that they could act as intermediaries between the colonial government and the locals. (Tsui 2004: 104)

As Sweeting (1996, quoted in Kan & Adamson 2010: 169) puts it, the era between 1860-1950 could well be described as the time of “colonial élitism”, as opposed to the “tentative vernacularisation” that came after. While it was undoubtedly the aim of the colonial administration to have an educated elite, which could serve as a bridge between the colonised and the coloniser, the English language proved to be useful as a means of economic and social advancement within the Hong Kong society:

Colonialism brought the English language to prominence, being perceived as a key to economic prosperity and driving a wedge between the haves and have-nots [...]” (Kan & Adamson 2010: 167)

A short time after 1842, the English language proved useful for upward mobility and trade, and the ‘market’ saw an increasing need for schools that offered English-medium instruction. English was the language of the colonialist force and thus not popular as such, but nevertheless perceived as advantageous and therefore desirable. During the governorship of Sir John Pope Hennesy, “the adoption of an English-oriented policy resulted in a steady increase of enrolments in the government Anglo-Chinese stream and a concomitant decline in the Chinese-medium stream.” (Evans 2008a: 49) There were also an increasing number of schools run by Christian missions. By the end of the 19th century, as Evans notes:

The expansion of English-language education [...] stemmed less from the British authorities’ undoubted desire to promote English than from the demand that arose from certain sections of the Chinese community, who increasingly came to see that proficiency in English opened up the prospect of social and economic mobility in the colonial milieu. (Evans 2008a: 51)

Hennesy, then Colonial Governor (1877–1883), was very much in favour of introducing English for all Chinese students, presumably to “elevate the status of the subject peoples by encouraging indigenous representation in government and removing racially based inequalities” (Lowe and McLaughlin 1993, quoted in (Evans 2008a: 52). It is interesting to note that despite his proclaimed best intentions and his supposed empathy with the colonised, Hennesy never seemed to assume that the English language was anything but superior to any other language. Hennesy argued that, apart from being vital to administration and trade, English was also the

language Chinese parents wanted for their children He pursued his goals with great enthusiasm, but little pedagogical expertise and finesse, which brought on a conflict between him and the principal of the Central School in Hong Kong, Stewart (cf. Sweeting 1990).

The future language policy of Hong Kong was built and implemented on the conflict between Hennesy, Stewart and the Colonial Secretary in London. The teaching of and in English was to be encouraged, while the learning of Chinese was made optional against Stewart's advice, whose earlier efforts had included the promotion of vernacular mother-tongue teaching in all but one school in Hong Kong (Evans 2011: 25). All the while, the actual policy was kept vague, and the Colonial Secretary was careful not to commit to any definite course of action concerning the language policy in Hong Kong. As Evans (2008a: 61) notes: "[the metropolitan government's verdict] is significant because it represents [the] first attempt to set out its position on language policy in Hong Kong education" and also "[the] supposedly 'definitive' despatch [...] is still remarkably vague on what constituted the fundamental objective of British policy in Hong Kong" (ibid). While in this verdict of the metropolitan government in London from 1879 there seems to be an obvious preference for the English language to be used in Hong Kong state-funded schools, the authorities in fact did not seem to want to explicitly state how exactly the policy was to be carried out in practice.

That is not to say that the changes in the educational system made by the colonial government were not met with scepticism and resistance from the population before it became apparent that English would become the language of advancement and upward mobility in Hong Kong. The Governors succeeding Hennesy, Bowen (1883-85) and Robinson (1891-98) voiced opinions quite similar to Hennesy's and further supported (and endorsed) English-medium instruction for Hong Kong (Boyle 1997: 173). The years after 1879 saw a steady increase of the use of English in schools, as shown in Fig. 1.:

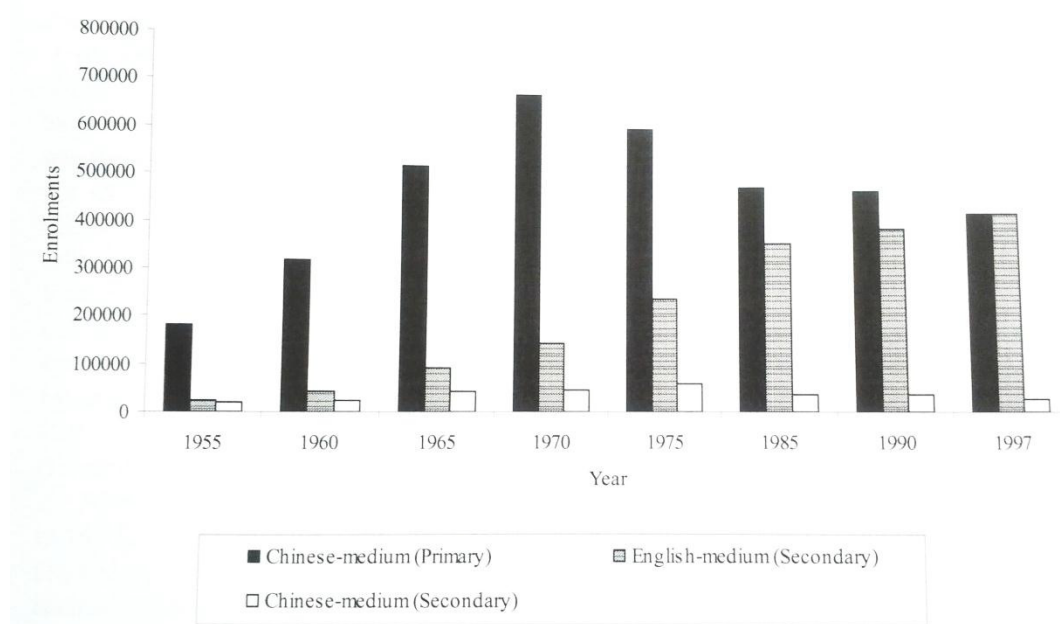


Fig. 1 Enrolments in government schools by Medium of Instruction (1855-1930) (Evans 2011: 26)

After a while, the use of English as a Medium of Instruction in the British colonies proved to be insufficient when it came to achieving certain levels of English language proficiency – several reports, notably the Committee on Education’s report in 1902, “highlighted the unsatisfactory results of English-medium education” (Evans 2011: 28). This was followed by a formation of the Colonial Office’s Advisory Committee on Native Education in British Tropical Africa in 1924, later renamed Advisory Committee on Education in the Colonies (ACEC) in 1929, whose function was to collect information und spread advice among the colonial policy-makers, who were free to follow this advice to the extent which related to the local mentalities and circumstances (Evans 2011: 28).

With the formation of the ACEC, education in the British colonies was where it had started –a framework for MOI policy makers existed, but they were still free to act independently and apply it – or not. It was accepted that mother-tongue education is beneficial to the ones receiving it, while it also seemed as if the British were intent on limiting access to English, as it would mean giving the colonised people a chance to participate in the administration, something the colonial governments had not so far included into their plans. At the same time, seeing English as a means to upward mobility, the colonised people were intent on getting an education in

and through English (even though it did not work as well as assumed), while the colonisers meant to allow access to English-medium education only to “those who have the desire and capacity for European studies” (Imperial Education Conference 1927: 46, quoted in Evans 2011: 29). The other students were supposed to be taught in their own language, the teachers to “use and encourage an indigenous language, wherever possible the mother tongue” (ibid). With English being seen as a prestigious language worth knowing, the indigenous languages suffered a decrease in value for the indigenous people. This, in return, gave rise to an increased demand for English-medium education.

In 1935, the influential and much-quoted Burney report was published, which concerned itself with education in Hong Kong. Burney was a visiting British education inspector who commented that too much emphasis in education was placed on English, while Chinese did not receive the attention it deserved. He also remarked that Chinese should be used as Medium of Instruction (Tsui 1996: 243).

The report highlighted the need in Hong Kong for a vernacular education which would ensure that the students were fluent and literate in their own first language, as to allow them to learn English to a certain extent, “limited to the satisfaction of vocational demands” (Burney 1935: 25). After Second World War, there were talks of actually implementing Chinese-medium instruction up to junior secondary level, a notion that was quickly abandoned after protests by schools (cf. Sweeting 1993).

4.2.1.2. Hong Kong between the 1950s and 1990s

During the rise of Hong Kong’s economy after WW2, the English language became more and more desirable to the people, and while educational reports and experts (Education Commission 1963, Board of Education 1973, Education Commission 1984) recommended mother-tongue instruction, other stakeholders, such as exponents of economy and parents, wished for an English-medium instruction (Evans 2011: 31).

In the 1973 Education Green Paper – a consultation document – Chinese was recommended as the language of instruction for lower secondary schools. The White Paper that followed in 1974 disregarded this recommendation and the choice of MOI was left to schools. In 1982, visiting educationalists made several recommendations on Hong Kong's educational policies. This recommendation paper, commonly referred to as the Llewellyn Report, reiterated the points already made in the Green Paper of 1973. It was pointed out that the English language enjoyed the highest priority, sometimes at the cost of all other subjects, and that the students found it difficult to reach the level of proficiency in English needed to follow the instruction in English and thus often had to resort to rote learning (Tsui 1996: 243).

The recommendations of all the panels have been more or less ignored, since the government always argued (in accordance with the opinions of the main stakeholders in society – the economy and parents) that English was a valuable asset to Hong Kong society and also that the choice of Medium of Instruction should be left to schools (Kan & Adamson 2010: 170).

The promise of economic success and social advancement which the English language carries was as strong as ever, so the colonial Hong Kong Government, bent on staying in their citizens' good graces, did not press for reform in this sector (cf. Morris & Scott 2003). The Government also allowed the establishment of Chinese-medium schools from the 1950s onwards, but these schools never received much public support before the official change of Medium of Instruction in 1997 (Kan & Adamson 2010: 169).

The founding of the English-medium Hong Kong University during the governorship of governor Lugard (1907-1912) in 1912 ensured that:

[s]econdary schools would adopt English-medium, since English-medium secondary pupils would clearly have a much better chance of gaining a place in the University and of doing better than those from Chinese-medium schools. (Boyle 1997: 174)

It also raised fears among the colonisers that an educated Chinese elite would develop a critical political voice and also, economically, become a source of serious competition for the British in Hong Kong, which, as Boyle (1997: 174) briefly mentions, did come to pass.

The founding of the Chinese University in 1963 was supposed to enhance the status of Chinese in Hong Kong's schools, yet although the Medium of Instruction at the Chinese University was Chinese, the entrance exams were held in English, so the students from English-medium schools did better at entering the Chinese University than did the students from Chinese-medium schools (Boyle 1997: 174). Students from English-medium schools presumably did well at the entrance exams, but there is no mention of how well they fared later in their studies. If current studies are any indication, they presumably had trouble adapting to the high level of Chinese at which one must operate at university (ibid).

It was a little more than ten years later, in 1974, that spoken Cantonese (with written Modern Standard Chinese) was recognised as an official language alongside English "after considerable public pressure" (Tsui 2004: 98). Cumming and Dickinson argue that:

[t]he government [...] enacted the Official Languages Ordinance, which declares the English and Chinese languages 'the official languages of Hong Kong for the purposes of communication between the Government or any public officer and members of the public'. It also declares that the 'official languages possess equal status' and, subject to the provisions of the ordinance, 'enjoy equality of use'. (Cumming & Dickinson 1996b: 41)

At the end of 1984, the Sino-British Joint Declaration was signed, which is:

[a]n Agreement between the Government of the United Kingdom of Great Britain and Northern Ireland and the Government of the People's Republic of China on the future of Hong Kong signed on 19 December 1984. (Hong Kong Government 1984)

This declaration in essence was an agreement between the two countries on the terms and conditions and also the time frame in which Hong Kong would be returned to the People's Republic of China. This gave Hong Kong a period of more than a decade to prepare for the change. It had consequences for the society, the

language it spoke and the Medium of Instruction that was used in schools and universities. Lin elaborates on the influence of this decision on the language in Hong Kong before the actual handover:

The 1980s and 1990s witnessed the increasing visibility in Hong Kong society (e.g. in movies, popular fiction, and magazines) of a Cantonese-English bilingual mode of communication (characterised by the insertion of English lexical items in an otherwise Cantonese sentence, e.g. Neih take gei fo?, meaning “You take how many subjects?”). (Lin 1996: 50)

In the year of the Sino-British Joint Declaration, 1984, the Education Commission Report No. 1 was published, the first of several such reports. Tsui argues that although Chinese was recommended as MOI:

[the Education Commission Report No. 1] 1984 paid lip service to mother tongue education but decided against the recommendation [...] that Chinese should be mandated as a Medium of Instruction on the grounds that doing so would deprive students who can benefit from English-medium education of a chance to learn through English. It resorted yet again to the familiar tack of leaving the decision up to individual schools. (Tsui 1996: 243)

Many teachers and university lecturers were using both Chinese and English in their class to supplement for lacking English skills and to help their students understand the subject matter. Needless to say, these ‘survival strategies’, employed by beleaguered teachers with insufficient resources in English were frowned upon and stereotyped as “pidgin or an interlanguage” (Lin 1996: 74). This, in fact, may simply have been a “local, pragmatic solution to the problems created by the imposition of a foreign language as a Medium of Instruction despite their having a common native language” (ibid).

Several sociolinguists in Hong Kong (Cheung 1984) (Gibbons, J. 1979 and 1987) (Luke 1984) researched Hong Kong bilingualism and bilingual practices. It did not help their cause that someone like the Hong Kong Governor would use the term ‘Chinglish’ in a derogatory way. Mixing Chinese and English was thought to result in deteriorating of both English and Chinese language skills and was therefore not permissible in schools (Lin 1996: 50).

It has to be added that not everyone saw code-mixing in class as detrimental to students' development. The people who actually taught in class and had to face students on a daily basis thought of code-mixing as a useful tool to help students understand more of the content they tried to convey.

The younger generation of teachers in particular view the mixing of codes, not as an evil necessity, but as a useful maximisation of linguistic resources in the classroom. They point out that this is further evidence of the demise of the diglossic system that has maintained English and Cantonese in complementary distribution within the community. (O'Halloran 2000: 146-147)

The notion that using both languages simultaneously was not desirable culminated in the Education Commission report No. 4 in 1990, according to which the schools should be streamed into either "Chinese-medium" or "English-medium" secondary schools, with the goal of providing 'one clear medium' for the students. (Lin 1996: 52) The streaming of the English-medium and Chinese-medium schools – starting from 1994 – brought on what would later be lamented as contributing to social elitism and division between those who speak English and those who do not.

The Education Department Commission issued a recommendation to schools that advised the schools that

[t]he use of mixed code in schools should be reduced in favour of the clear and consistent use in each class of Cantonese or English in respect of teaching, textbooks and examinations. (Education Department Commission 1990: 99)

The suggestion issued was outright ignored by most schools, which (rightly) feared that they would face opposition from parents if they officially changed their Medium of Instruction from English to Chinese, i.e. if they dared to change the label on what had to be evident to anyone involved in teaching or studying – that teaching took place in Chinese for the most part, despite the label English-medium. "A total of 272 schools did not follow the Education Department's advice on the Medium of Instruction most appropriate for their pupils" (Education Research Section 1998, quoted in O'Halloran 2000: 149).

In her response to an article written by Tickoo (1996), Amy Tsui, also in 1996, just before the return of Hong Kong to the People's Republic of China, writes about the relationship between the Hong Kong society and English. She discusses the issue of elitism and the wish to use English as a tool for social advancement, as well as the notion that the society still sees English as the language of the coloniser. In the same paper, she also deliberates on "whether educational solutions [can resolve] language conflicts or not" (Tsui 1996: 241). Tsui concludes that in order to successfully introduce mother tongue instruction to Hong Kong schools, the status of the mother tongue must be elevated in regard to English (Tsui 1996: 246-247).

Lin discusses several interesting points which contributed and still contribute to the continued popularity of English in Hong Kong and the high demand for EMI schools in the SAR. She calls the need for English in Hong Kong a myth, mostly because, as she finds out, the Hong Kong economy is highly dependent on China and not on English-speaking countries, and goes on to say:

[i]f English has been important to Hong Kong's economic success, it has only been one among many other equally or more important factors, such as the work ethic of the people, the continued development of China's economy, the opening of China's huge consumer market, and a mastery of the Chinese language. (Lin 1996: 57), original emphasis)

She concedes, however that "most of the white-collar jobs [...], especially those offered by foreign companies in the colony, have always demanded a competence in English" (ibid.) In order to strengthen Hong Kong's academic achievement and reach high academic standards, Lin proposes that schooling should be available to more students, not only the ones who are conversational in English. She adds good reasons for a change that should include the majority of students, not only those who speak English well: "In the process of indigenisation, knowledge development is advanced through the cross-fertilisation of externally appropriated knowledge and indigenous contributions and innovations." (Lin1996: 59) She deplores the "total subordination of education to commercialism" (Lin1996: 60), because the promise of a more fertile academic communication in the tertiary domain is traded for a secondary education conducted in English, which serves to provide "workforce training and credentialing for the economy" by "rote learning and copying from

textbooks” (ibid) instead of innovative minds who can think independently. Teachers were not prepared to balance content and language education, and not taught how to incorporate language in content instruction. (O'Halloran 2000: 153)

This leads to one very central question that is important not only for Hong Kong, but for all educational institutions that provide learning in a second language in spite of the majority of students (and teachers) having a common language other than the language of instruction. Is there a way to successfully combine language and content learning, and if not, which aspect of the two is more important and which one will suffer?

4.2.2. Post-colonial Hong Kong

Hong Kong's population of approximately seven million is comprised of 96% Chinese, while the rest are 2% Filipinos and 2% are other nationalities. As found in a survey from 1993, an overwhelming majority of the people spoke Cantonese at home (over 80%), while only 1.3% of the population spoke English as their first language. (Tsui 2004: 97) Since then, the number of Cantonese speakers has increased to 88.7% (Census and Statistics Department of Hong Kong SAR, 1991, 1996, 2001, 2006). In the years following, it increased even more, as shown in Fig. 2.

Table 3 Population Aged 5 and Over by Usual Language (% of total)

Usual Language	1991	1996	2001	2006
Cantonese	88.7	88.7	89.2	90.8
Putonghua	1.1	1.1	0.9	0.9
Other Chinese Dialects	7.0	5.8	5.5	4.4
English	2.2	3.1	3.2	2.8
Others	1.0	1.3	1.2	1.1
Total	100.0	100.0	100.0	100.0

Note: The figures exclude mute persons.

Fig. 2 Population by-census (Census and Statistics Department of Hong Kong SAR, 1991, 1996, 2001, 2006)

The majority of public schools in Hong Kong were English-medium up to the return of Hong Kong to People's Republic of China despite the fact that Chinese was the first language of an overwhelming majority of students. As Tsui says:

[p]rior to the implementation of the mandatory mother-tongue education policy in 1998 [...], about 94% of the students were studying in English-medium secondary schools¹, whereas only 6% were studying in Chinese-medium schools. (Tsui 2004: 98)

She also goes on to explain in her footnote (see quote above) that the figures on English-medium and Chinese-medium schools and universities are misleading – something that is found in several other surveys, e.g. Evans (2002 and 2009), Shum *et al* (2005), Low & Lu (2006), Li *et al* (2001) etc. – namely that despite the label “English-medium”, many teachers in secondary education in Hong Kong used mixed code in their lessons, where they used both Chinese and English in varying degrees to speak with their students, while they kept English as the written Medium of Instruction. (Tsui 2004: 116). Lai (1998, in O'Halloran 2000: 148) provides statistical data: “though 90.8% of the secondary schools professed to be English medium it was apparent that very few of these offered a genuine English medium instruction”. More drastically, while schools and universities claimed to be ‘English-medium’, “code switching in the lecture halls and tutorial rooms of many of the institutes has become an open secret” (Lin1996: 60). The need for schools to pretend to be English-medium in order to please the public, but nevertheless teach content to students who then were required to pass examinations “has resulted in a widening discrepancy between the professed Medium of Instruction of the secondary school and the actual practice in the classrooms” (O'Halloran 2000: 148).

The need for a new language policy that would put the mother tongue before English, or rather provide the students with the language tools needed to learn content and language at the same time, was evident, as O'Halloran notes:

The absence of a strongly directed language policy has meant that by July 1997 the vast majority of secondary schools claimed to be English medium and entered their students for public examinations assessed through English. (O'Halloran 2000: 147)

This was supposed to change with the policies that were implemented just before the return to China.

The Hong Kong government put forward a strong rationale for CMI, with implementation planned for September 1998, more or less coinciding with the return of sovereignty over Hong Kong to China. The change of sovereignty in 1997 is therefore associated with a change in language policy. (Tse 2007: 11-2)

4.2.2.1. The change of MOI 1997/8

Hong Kong remained under the British rule (with a short interval of Japanese reign during the Second World War) until 1997, when People's Republic of China regained sovereignty. Since then, Hong Kong has been named a Special Administrative Region Hong Kong (SAR).

Shortly before the handover of Hong Kong to PRC, Hong Kong's colonial government formulated a policy for Medium of Instruction in schools, which later came to be known as "Firm Guidance". This "firm guidance on the MOI to all secondary schools for adoption" (Evans 2000: 191) had been prepared during the 1990s, in the last decade of colonial rule. Four months before the handover of Hong Kong to PRC in July 1997, the colonial government proposed that the large majority of schools would be required to adopt Chinese as their Medium of Instruction, while 100 schools would be allowed to continue with their teaching in English. This time, the schools did not have the option to remain officially English-medium. Two months after the handover, the Hong Kong schools had to comply with the "the first and the most controversial educational policy in the territory, the mandatory mother-tongue education policy. (Li & Majhanovich 2010: 13)

Mandatory mother-tongue instruction was announced for all schools except for those that could prove that they met certain standards:

In order to remain in the English stream, schools had to demonstrate to the government that they fulfilled the prescribed requirements concerning students' ability, teacher capability, and schools' support strategies under English education. In the end, only 114 schools could remain in the English

stream. The remaining 346 schools had to switch to Cantonese-medium instruction. (Li & Majhanovich 2010: 13)

Since the recommendations of the Hong Kong Government's Education Panel had not translated into reality so far, i.e. the Medium of Instruction for most schools was still (officially) English with a practice of code-mixing and supplementing with Chinese in class, a Firm Guidance for secondary schools was issued. The Hong Kong Government's Panel on Education issued the following summary to its members in order to explain the reforms that were to follow.

In July 1997, after considering views from consultations, [...] the following principles and arrangements have been established for the MOI guidance for secondary schools to be issued in September 1997:

- a. All local public sector secondary schools should, on the basis of the principles in the MOI guidance, examine their own conditions to determine the MOI appropriate to the needs and ability of their students.
- b. Starting with the Secondary 1 intake of the 1998/99 school year, Chinese should be the basic MOI for all local public sector secondary schools. If a school should, after careful deliberation, intend to adopt English as MOI, the school must provide sufficient information and justification to ED to support such choice.
- c. ED will establish a vetting committee, chaired by a non-official, to consider schools' proposal to use English as MOI. The factors for consideration will be detailed in the MOI guidance. The aim is to ensure that the procedures are open, fair and transparent, with the benefit of impartial input.
- d. Mixed-code teaching should not be used in schools.
- e. At junior secondary levels, individual schools should not operate both Chinese-medium and English-medium classes at the same level.
- f. At senior secondary levels, the MOI policy may be applied with more flexibility. Exceptionally, schools meeting requirements may, with ED's agreement, use English as MOI for some subjects.
- g. At sixth form levels, schools may choose the MOI which best meets the needs of their students.
- h. For the subjects of religious studies, cultural, commercial and technical subjects, individual schools may choose the MOI which best meets their circumstances.

- i. Schools should introduce to students the English-Chinese glossaries for various subjects, reference books and learning materials regardless of the language medium.

(Panel on Education 1997)

Prior to the change of government, the language of instruction was, in principle, mostly English, which was understood to be the second language for Hong Kong students. The language was provided in two ways: English was one of the core subjects, which means that it was compulsory for all students between the ages 6 and 17. The schools could also provide their students with English-medium education, which was offered by approximately 10% of the primary and 80% of the secondary schools in Hong Kong. It is worth remembering, however, that in schools that claimed to have English-medium instruction, English in class was mixed with Chinese to varying degrees, in order to help the students understand what was taught and also to understand their textbooks, which were written in English (Cumming & Dickinson 1996b: 42). Those were the “the pragmatic strategies teachers adopted in the classroom to help their students cope with an apparently unworkable language policy” (Johnson and Lee 1987, quoted in Evans 2011: 20).

Thus a new ‘enemy’ in the classroom was identified: switching between English and Chinese in the classroom (Johnson 1998: 266). As formulated in the new Firm Guidance: “Mixed-code teaching should not be used in schools” (Panel on Education 1997).

For the past twenty years, then, there has been a wide gulf between policy and practice in the vast majority of Hong Kong’s Anglo-Chinese secondary schools, for although English has been the usual medium of blackboard work, textbooks, assignments and examinations, code switching between English and Cantonese and mixed code have been the dominant mode of oral communication. Mixed-mode teaching has thus been a compromise between English-medium instruction, which the majority of students and teachers are apparently unable to cope with, and Chinese-medium instruction, which, because of the limited opportunities it affords for socio-economic advancement, Hong Kong parents are perceived not to favour (Evans 2000: 189).

Although the change of MOI seemed popular among students, parents and educators before it was implemented, it brought on what seemed one of the most

difficult problems in Hong Kong education – the social divide between those who were allowed to join EMI-schools and those who are not. Parents feared that their children would not be able to enter university because they were not allowed to study in English, and the economy feared the decline of levels of English which were needed for Hong Kong to remain – by virtue of being able to converse English – interesting and easily accessible for foreign business, investors and trade (cf. Tung *et al* 1997, Lin 1997 and Kan & Adamson 2010).

Although the government's MOI policy was widely predicted in educational circles, and is indeed the culmination of initiatives introduced in the last decade of colonial rule, the decision to force most of the territory's Anglo-Chinese secondary schools to switch from English to Chinese has caused a storm of controversy, particularly among parents, who, in letters, columns and radio phone-ins, have expressed their outrage at a policy which they perceive to be high-handed, inconsistent and socially divisive. (Evans 2000: 185-6)

Despite studies that prove otherwise (cf. Shum *et al* 2005, Tsui 2004 and Tsui & Tollefson 2004) – i.e., show that studying in the mother tongue offers many benefits, Chinese-medium schooling has been thought of as inferior to English-medium schooling. There are voices claiming that the lessened exposure to the English language will diminish the students' interest in the language and their ultimate ability to use the language at the workplace.

[the] learning of English is yet to be improved. We believe that the EMB should consider deploying more human resources or subsidies to create an appropriate English environment for students.' Another teacher expressed that 'some students even think that as it is only necessary to master Chinese (for getting good results in public examinations, for example), they can avoid using English, which is a more difficult subject for them. They simply lack the confidence to learn English well.' This shows that CMI school administrators and teachers are very sceptical of whether students can maintain an English standard they should have. The problem of how to keep up a better English standard in students seems to be a pressing issue pending further investigation for the authority concerned. (Shum 2005: 7)

The question whether a good command of English is more important than an adequate education in all the other subjects has not been answered satisfactorily so far, but, as Shum *et al* (2005) suggest above, teaching students in their mother tongue, with added resources allotted to English teaching could help establish a

high level of mother-tongue education and at the same time secure an acceptable level of English. Peter Tung also mentions other problems inherent to teaching in Chinese in the 1990s. The teachers were not trained to teach in Chinese but in English, and many of the teachers mentioned in his survey found it easier to speak about their subject in English. Also, most of the textbooks were written in English, therefore the teachers were sceptical whether there were any good textbooks in Chinese available (Tung *et al* 1989: 59-60).

The change of MOI was not universally well-received all over Hong Kong. Lin (1996) implies that

[s]ome Hong Kong people may attempt to use English to draw a boundary between Hong Kong and China due to their Sinophobia. They stress the role of English in keeping the international status of Hong Kong, a status unique and distinct from China. [...] (Lin1996: 78)

There seemed to exist some fears of an invasion of the job market by Chinese-educated professionals if there ever were a change from the British- and English-based professional and higher education systems to Chinese-based ones. However, in using a foreign language to draw a boundary between Hong Kong and China, opponents of the Firm Guidance were actually drawing a boundary within Hong Kong, one between those who have access to English linguistic capital and those who do not.

Apart from the, as Lin(1996: 78) claims, Hong Kong “Sinophobia”, there certainly are sound reasons for former British colonies to hold on to English for a while longer – its usefulness: “While emotional attachment may be to one language, pragmatic needs motivate not only the continued use of English, but its further expansion.” (Kachru 1986: 131)

In her paper on the mother tongue instruction and the perception thereof, (cf. Wong, L. L. C. 1997) describes the reactions of the stakeholders to the Firm Guidance. The stakeholders include educators, school administrators, parents and students. She also includes a very interesting chapter for which she uses “editorials, letters to the editor and articles in discussion columns in local newspapers” (Wong,

L. L. C. 1997: 111), in which the reactions of the general public to the official change of the Medium of Instruction are revealed and discussed. She divides the arguments in the discussion into several different streams of argumentation: educational, sentimental, etc.

The lively and heated correspondence that took place in the press on the announcement of the policy indicates that schools that failed to be designated as EMI are regarded as poorer schools and the pupils that find places in EMI schools are seen as advantaged. (O'Halloran 2000: 152)

In models proposed by Kelman (2006) and Mejias & Anderson (1988) respectively, such reaction patterns are described, using the distinction "Sentimental-Instrumental", in which:

The sentimental role concerns values that are traditional and cultural, while the instrumental role has to do with economics and job-improved possibilities. While both sentimental and instrumental roles may be observed micropolitically, that is in individuals or interest groups, sentimental is more micro and instrumental more macro, in that the sentimental attachment is more about identity and the instrumental more about conformity and normative expectations. (Davies 2009: 45)

Many of the letters and articles in defence of the Chinese-medium schools were answers to letters and articles by English-medium supporters. There they stated some key points in the discussion quite bluntly, namely that studying in English did not help the students acquire English better, and only made things worse for those who were not necessarily gifted enough to study in English, but probably were perfectly capable of producing excellent results in their mother tongue. These potentially brilliant students (and also average ones) were forced to retreat to rote learning, while the teachers in English-medium schools had to explain most of the things in Chinese in any case, because otherwise the students would not be able to understand either them or their books. In comparison, Hong Kong students that were supposedly taught in English were not better in English than students in other parts of Asia (including PR China and Taiwan), who learned English as a foreign language in school. Wong (1997) quotes a passage from a newspaper:

The academic performances of the universities in the mainland and Taiwan have not been affected by the adoption of mother tongue instruction, and students learn another foreign language (not necessarily English) at the same time. (Wong, L. L. C. 1997: 116)

The shift to Chinese-medium and the subsequent discussion also prompted the use of emotionally loaded pro-Chinese arguments, which were intended to demonstrate the 'rightness' of using Chinese in schools instead of the non-native language of the colonisers. The Chinese language was supposed to bring back the national integrity and pride in customs and language that have been perceived as lost during the colonial period. It was also supposed to return the young people of Hong Kong, who were perceived as not quite Chinese but also not quite anglicised, to their original culture. The Chinese language was also supposed to unify Hong Kong with the motherland, a notion that seems to have been rather popular at the time. It is also mentioned that Chinese is a language of which one can be proud, because it is a big language, and listed as one of the UN working languages. (Wong, L. L. C. 1997: 117-121) Ironically, the people who brought forth their view that 'the youth' was not properly Chinese must have spent their whole lives under the colonial rule and presumably have also received their schooling in anglicised Hong Kong schools, yet did not seem to perceive themselves as 'not proper Chinese'. There is no mention that the "Chinese" that is listed as a UN working language may not necessarily be the domestic Cantonese that is spoken in Hong Kong, but rather Putonghua. Even the Hong Kong Government's website on official languages does not specify which variety of Chinese they mean by "the Hong Kong official language Chinese" (cf. Hong Kong Government Website 2008).

The difference between Cantonese and Mandarin/Putonghua and the emergence of Putonghua as a new, useful language in Hong Kong after the re-unification with PR China is an issue that started to gain weight after the handover, and also an important matter for education in Hong Kong. While Putonghua to the people of Hong Kong is basically a foreign language that shares many traits with English – prestige and usefulness being some of them – it has the advantage of being linguistically closer to Cantonese and sharing a similar script. It is also the lingua franca used in PRC and therefore useful, e.g., for Hong Kong students who want to

attend universities on the Chinese mainland. In future, we might see the rise of Mandarin/Putonghua, while Cantonese has to take the back seat behind the more useful, bigger languages (cf. Li, D. C. 2009). While this is, as mentioned before, a very interesting question, it will be mentioned only briefly, as it would be beyond the scope of this thesis to look into the possible emergence of Mandarin/Putonghua as the new dominant variety of Chinese in Hong Kong.

4.2.2.2. The EC Report 2005 and the Fine-tuning 2009

The Firm Guidance of 1997 was a huge step for Hong Kong toward depicting actual classroom reality through policy. The outcomes of the reform were shown in two studies, *The Report on review of Medium of Instruction for secondary schools and secondary school places allocation* (cf. Education Commission 2005a), (EC Report) and the *Fine-tuning the Medium of Instruction for Secondary Schools* (Education Bureau 2009b), Fine-tuning or FT. The HKSAR Government accepted the recommendations in the EC-Report to be implemented in 2010 and the Fine-tuning was commissioned in response to public demand. (Kan & Adamson 2010: 2)

In essence, the Commission's recommendations were:

1. uphold the existing policy on CMI for S1-S3, i.e. the mother tongue is most effective MOI for all students.
2. modify the prescribed criteria for schools wishing to adopt EMI
3. enhance English proficiency in schools by:
 - a. extending learning activities;
 - b. increasing learning resources;
 - c. providing English enhancement schemes;
 - d. enriching the language environment; and
 - e. increasing teachers' professional development

(Education Commission 2005a, quoted in Kan & Adamson 2010: 2).

As Kan *et al* point out, the overall aim to educate trilingual bilinguals and uphold mother-tongue education did not receive the same amount of attention that was given to the improvement of the proficiency through increased exposure to English in the EC Report. (Kan & Adamson 2010: 2)

The Fine-tuning that followed the EC Report in order to satisfy public demand was commissioned by the Education Bureau in 2007 and was finished in 2009. The results of the Fine-tuning were summed up as *Enriching Our Language Environment, Realizing Our Vision*. As the possibly most important outcome of the Fine-tuning, the bifurcation of schools in HKSAR will cease to exist: the schools will no longer carry the label 'CMI' or 'EMI', which, at least superficially, is supposed to remove the perceived difference between the "prestigious" EMI schools and the less desired CMI schools. (Kan & Adamson 2010: 2)

It also allows former CMI schools to use some of their lessons for English immersion (Li & Majhanovich 2010). Time will show whether Hong Kong's secondary schools will carry on with the partial immersion model which has shown good results in other places so far (cf. Baetens Beardsmore 2013) or revert back to the full immersion model of pre-Firm guidance times.

5. Appraisal of issues in CLIL (Europe) and EMI (Hong Kong)

In this chapter, I will take a closer look at the way in which CLIL in Europe and EMI in Hong Kong are handling the issues of teacher education and the definition of MOI. It is important to note that the teaching of languages is not the same as teaching of content, and that both are not the same as teaching content through foreign languages. Using foreign languages to teach content is a concept that can offer much to schools, students and teachers; it is important to keep in mind that the success of this teaching concept depends on research, reflexion and curriculum planning (ZydatiB 2002: 58).

5.1. Comparison CLIL (EU) and MOI (HK)

Ulrich Wannagat (2007) compares the workings of both CLIL as it is practised in Germany and EMI as it is practised in Hong Kong. For his comparison, Wannagat uses the *de iure* EMI stream as prescribed in Hong Kong's Firm Guidance education policy of 1997. His study is designed to „compare the processes and effects of learning in a CLIL and an EMI context” (Wannagat 2007: 664). While both programmes can be defined as late immersion, the Hong Kong model includes a complete shift to teaching through English from teaching through Chinese in secondary education, while the German model introduces teaching through L2 only in some content classes. . In Wannagat's example, an English-medium history CLIL class in North-Rhine Westphalia (Germany) is compared to a secondary high school EMI history class in Hong Kong (cf. Wannagat 2007).

The study identifies several features that can be found in both CLIL and EMI (as implemented in both countries respectively) but which are executed in different ways. He summarises these in the following table:

	CLIL Germany (NRW)	EMI Hong Kong
Type	Late partial immersion, starting at grade 7	Late full immersion, starting at grade 7

Objective	Additive bilingualism; additional subject matter skills	Additive bilingualism
School organization	CLIL stream in a regular L1 secondary school; possibility to shift back to regular L1-taught stream	Separate EMI secondary schools
L2 exposure	Medium of Instruction for 2-3 subjects (mainly history, geography and politics); in addition L2 is taught as a subject	Medium of Instruction for all subjects, except Chinese and Chinese history; in addition L2 is taught as a subject
Preparation phase	Two years of 3 additional English lessons in grade 5 & 6 (in total 7)	Three months of bridging courses in Grade 7
Student selection criteria	Good overall performance, motivation and willingness to pursue long-term goals (L2 ability is not assessed)	Good performance in L1 and L2 (85% of Grade 7 students have to be among the top 40-50% of the internal school assessment for Chinese and English)
Students' L2 proficiency	English-as-subject starting in Grade 5 (secondary 1)	English as a subject from grade 1 to 6 (primary 1-6) and throughout secondary education
Teachers	Bilingual in L1 and L2, usually qualified to teach the respective subject matter and L2 as a subject	Bilingual in L1 and L2, usually qualified to teach the subject matter only
Teacher training	Special training for CLIL programmes available	No special training for teaching through EMI
Curriculum	Parallels the L1 history curriculum with additional curricular recommendations for CLIL programmes	Curriculum for Western history without addressing the issue of teaching through L2
Course materials	Course book designed in Germany for CLIL history lessons; L1 course book is used in addition	Course book designed in Hong Kong for EMI history lessons
Classroom culture	Similar to local L1 community	Similar to local L1 community
Language environment	Dominated by L1, exposure to L2 mainly in school context	Dominated by L1, exposure to L2 mainly in school context

Fig. 3 Differences between the CLIL in Germany (NRW) and MOI in Hong Kong programmes (Wannagat 2007: 666-667)

Wannagat's model juxtaposes Hong Kong EMI with one CLIL model out of many. As this paper aims to find differences and commonalities between the general EMI (Hong Kong) and CLIL (Europe) models, this section is, on the one hand, concerned with generalisation of Wannagat's CLIL model and on the other hand with the distinction between Hong Kong's *de iure* model and its *de facto* implementation.

5.1.1. Type

Wannagat's example describes late partial immersion vs. late full immersion, both starting at grade 7.

CLIL models can be early or late immersion models which start in primary, secondary or tertiary education, but all of them are partial immersion (cf. Eurydice 2006).

In Hong Kong, primary education has traditionally been provided in Chinese; with EMI starting at junior secondary level (year 7). This model was changed with the 1997 Firm Guidance – most of secondary classes in Hong Kong are now taught through Chinese, with only about one quarter of students studying through English from grade 7 on in English-medium streams (Evans 2009: 288). Hong Kong's Policy Fine-tuning (cf. Kan *et al* 2011) brings about the end of the distinction between EMI and CMI streams in secondary schools as well as a renewed increase in the number of English-medium classes in the former CMI stream. Before the policy Fine-tuning of 2011, the Hong Kong EMI stream was *de iure* (if not *de facto*) a full immersion model (cf. Evans, 2009). The policy Fine-tuning, which ends the bifurcation of CMI and EMI streams might introduce partial immersion in CMI streams. The policy allows for more English-medium classes in Hong Kong's schools in order to increase immersion time. (Kan *et al* 2011: 9). The increased number of English-medium classes could lead to an immersion model in Hong Kong's schools that is *de facto* quite similar to CLIL models in Europe as it would be not a full but a partial immersion model.

5.1.2. Objective

The CLIL model in Wannagat's example aims for additive bilingualism and additional subject matter skills, while, in his view, the Hong Kong EMI model aims for additive bilingualism only.

It is worth keeping in mind that CLIL is an umbrella term for different models in which subjects or parts of subjects – i.e., content – are taught through a foreign language with dual-focused aims, namely “the learning of content and the simultaneous learning of a foreign language” (Marsh *et al* 2002: 15). As there are no universal guidelines for CLIL models and the goals they are supposed to aim for, every model will be slightly different from the next. Also, every researcher's focus on this will be different, as CLIL is a field that interests linguists as well as educationalists and researchers in subjects that are taught through foreign languages. All of them regard the field from their own perspective, sometimes finding that there is not enough of the one (e.g. language) and too much of the other (e.g. content) or vice versa (Dalton-Puffer 2007: 295). At the moment, more research is needed to determine the ideal balance of content and language in class.

Looking at Vygotski's theories of the learning brain (Vygotsky 1962), Krashen's theory of “comprehensible input” (1985) and Cummins's theories of the bilingual learner (cf. Cummins 2001b), it is easy to think that the aim of studying content in foreign languages is primarily the expansion of immersion time devoted to immersion in said foreign language. At the same time, as Zydatið argues, the linguistic goals are put above the content acquisition goals (Zydatið 2002: 33), while Smit and Dalton-Puffer argue that CLIL models tend to favour content (Dalton-Puffer & Smit 2007: 12).

The benefits of CLIL education however do not only include additive bilingualism, but also the development of students' cognitive abilities. The students use different cognitive processes than those used for learning through L1 (Jäppinen 2005 quoted in Pavón Vázquez & Rubio 2010: 48).

EMI models in Hong Kong seem to favour the acquisition of English above all else, and raising English standards is the goal that is put forward by policy makers,

parents, economy and students (Poon 2004: 62). This, as well as Wannagat's claim that Hong Kong's EMI model is aimed only at the development of language skills seems to be contradicted by Hong Kong's consistently strong results in studies like the OECD PISA (cf. OECD 2011: 98f).

Wannagat suggests that CLIL aims for additional subject matter skills, while EMI does not (cf. Fig. 3), but this statement cannot hold true, because although all subjects except Chinese and Chinese history are taught through English, they are not taught only to teach the students the language. It is far more logical – especially in the face of Hong Kong's higher-than-average PISA rankings – to assume that in Hong Kong schools it may be true that the knowledge of English is given priority over all subjects, but the students are nevertheless supposed to acquire additional subject matter skills, not unlike in a CLIL environment.

5.1.3 School organisation

Wannagat's example is that of a secondary school in North Rhine Westphalia in Germany, with late partial immersion in some subjects. Students can return to the L1 stream at any time. The Hong Kong EMI schools are separate from CMI schools.

CLIL models in general, as already discussed, can encompass any school type, any students' age and any educational level from primary to tertiary education. It is not easily determined whether leaving a L2 stream to return to a regular L1 stream is possible in all cases, and whether this is relevant for the L2 stream. One example would be, for instance, our own Vienna University English studies department that could be described as a late, full immersion EMI model. Students that are not able to cope with the amount of teaching in English do not have the option of switching to a L1 curriculum while remaining at the department.

Hong Kong's schools have been separated into EMI and CMI streams since the Firm Guidance (1997). Evans has found that while teachers in the EMI stream have indeed been using more English in class than recorded in EMI classes before the Firm Guidance, they have nevertheless been using Chinese for scaffolding (Evans

2009: 299), a status that is only now, tentatively, being viewed in a more positive light (cf. Swain *et al* 2011). The policy Fine-tuning however ends the bifurcation of language streams, mostly because these were perceived as socially divisive and it seemed like fewer graduates from CMI secondary schools were able to enter Hong Kong's EMI universities due to their poor English standard (cf. Lau 2009). The new policy allows schools to adopt more English classes in their curricula – which will appease the public – without expressly saying so (Kan *et al* 2011). This may lead to an increased number of EMI classes within former CMI stream schools – up to approximately 25 % of the total lesson time (Li & Majhanovich 2010: 25) –, which in turn makes the model look increasingly like a CLIL partial immersion model.

5.1.4. L2 exposure

Wannagat's example compares a CLIL model in which the L2 is used in some subjects as the MOI and a Hong Kong school where the L2 is used for all subjects except Chinese and Chinese History.

According to the Eurydice report, the teaching time dedicated to instruction in L2 varies across Europe as well as across age groups and can range from one lesson per week up to taking up half the curriculum of a school year. It can be generally said that it normally does not take up the entire curriculum. The Eurydice report is also aware of the discrepancy between the proposed time in which the L2 is used and the actual use of L2 in class, as there is "official teaching time" mentioned in the report, but there is no discussion on how much of this time the L2 is actually used in class (Eurydice 2006: 27). It is worth mentioning that some university curricula are kept entirely in the target language in order to keep the immersion time in the language as long as possible or because they are aimed at an international student audience who speak different L1s and therefore must use a lingua franca understood by all. It is questionable whether these fall under the umbrella term CLIL. Unfortunately, answering this question would go beyond the scope of this paper.

Hong Kong has long been torn between research results and reports like the influential Burney Report. (Tsui 1996: 243) which emphasise the need for students to study in their L1 and the need to appease those who point out that Hong Kong's economy, based on services and trade, has an ever-growing need for proficient English-speakers and, nowadays, also of proficient Putonghua-speakers (cf. Li D. C. 2009). The key to an English proficiency for students seems to be increased exposure to the language, which takes away from the time spent studying in the L1. With the Firm Guidance (1997) in place, most schools were required to adopt Chinese as their MOI, which led to fears that decreased exposure would weaken the students' interest in English (Poon 2004: 65). Time will show how Hong Kong will implement the new, more liberal language policy in schools and whether this will help strike a balance between meaningful acquisition of subject content and L2 skills.

5.1.5. Preparation phase

The CLIL model in Wannagat's example prescribes two years of additional L2 lessons prior to entering the CLIL stream. The Hong Kong model relies on bridging courses to achieve English proficiency needed to enter the full immersion EMI stream.

The preparation time before entering a CLIL stream varies between countries and CLIL models. It is difficult, if not impossible, to pinpoint a model that could be valid for all types of CLIL provision, especially since CLIL, being an umbrella term, encompasses such a wide variety of different models.

Hong Kong's students, according to Wannagat's study, receive a three months bridging course to improve their English skills before entering secondary schools. The MOI & SSPA Report lists support measures for students and teachers meant to help bridge the transition from CMI to MOI or partial-MOI education such as additional teachers, provision of grants and the Native-speaking English Teacher Scheme (NET) (Education Commission 2005a: 153-156). The MOI & SSPA leaflet

points out the need for strategic planning, a school environment conducive to acquisition of English and well-designed bridging programmes (Education Commission 2005b: 4).

5.1.6. Student selection criteria

Wannagat's example shows that the students taking part in the CLIL model chosen for comparison need to show a good overall record of achievement in school as well as motivation to take part in L2 education, but the L2 proficiency is not tested. The students in Hong Kong's EMI model are allowed in the EMI stream if they show satisfactory L1 and L2 performance.

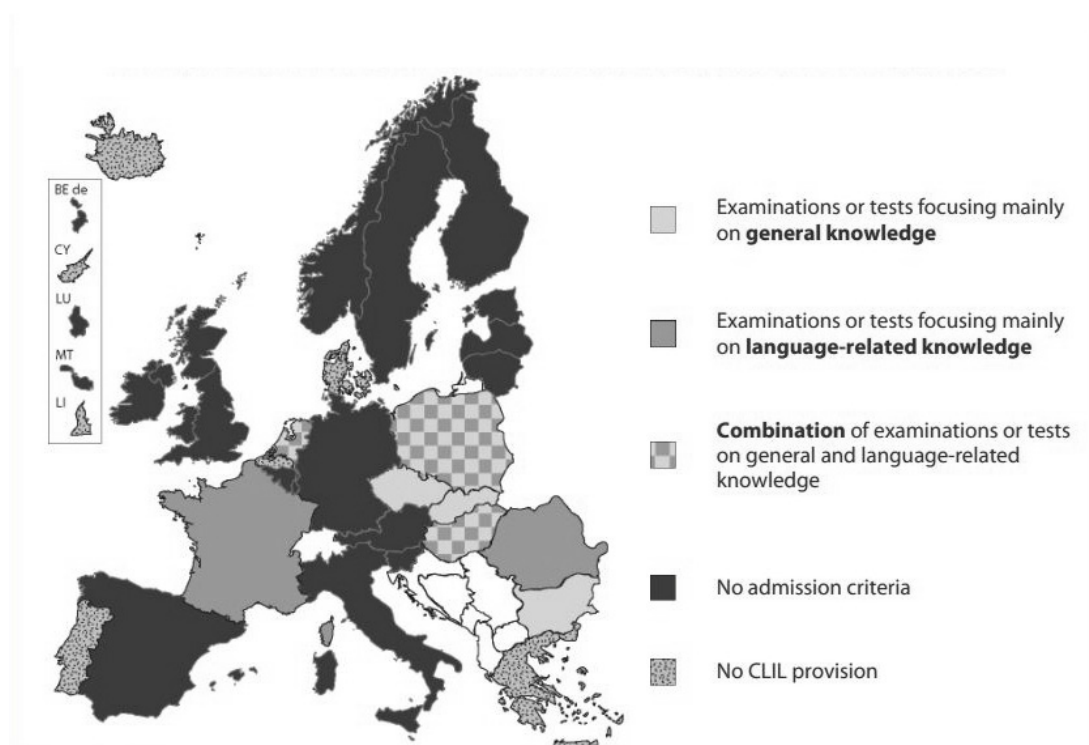


Fig. 4 Criteria governing admission to CLIL involving a foreign target language in primary education (ISCED 1) and general secondary education (ISCED 2 and 3), 2004/05 (Eurydice 2006: 21)

In general, in CLIL models are open to all pupils, when the CLIL model is “an integral part of mainstream education” (Eurydice 2006: 21). In some countries, there is a selection process for entry into CLIL streams, e.g. written or oral examination (see Fig. 4 above).

With the Firm Guidance (1997), Hong Kong's secondary schools have been divided into CMI and EMI streams. Entering an EMI stream school, of which there were limited numbers, became a matter of prestige and honour, so these schools could choose among the best students, while CMI stream schools were regarded as second-rate schools by some (Tse *et al* 2001: 11). With the policy Fine-tuning, the distinction between CMI and EMI schools has ended (cf. Kan *et al* 2011). It remains to be seen whether this mainstreaming of English-medium education will make an end to selective access to L2 education.

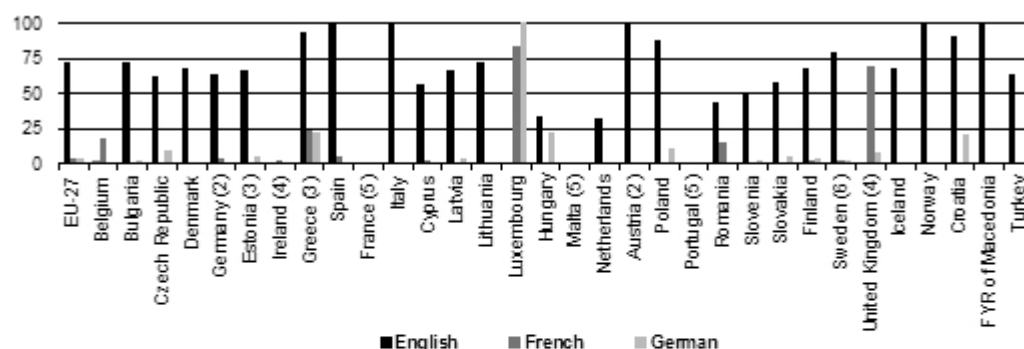
5.1.7. Students' L2 proficiency

The example shown in Fig. 4 shows that the CLIL students start studying English in Grade 5 (secondary 1), while the students in Hong Kong study English as a subject from primary 1 onward.

In an area as large and varied as the one covered by CLIL, every country must be considered separately, because language policies are issued by the countries. There can be no general statement on preparatory courses for CLIL programmes. Eurostat's figure below shows that for many pupils in Europe, the learning of foreign languages starts with primary education. This however, need not have any influence on later CLIL type provision.

It is also remarkable that many of the L2 lessons in primary schools are English language classes, with French and German coming in second.

In secondary education, "some 92.7 % of all EU-27 students [...] were studying English as a foreign language [...] compared with slightly less than one quarter studying German (23.9 %) or French (23.2 %)" (European Commission 2012), which shows that foreign languages are taught to most students in secondary schools, with a clear preference for English (see also Fig. 5 below).



(1) Refer to the internet metadata file (http://app.eurostat.ec.europa.eu/cache/ITY_SDDS/en/educ_es.ms.htm).
 (2) German, not applicable.
 (3) 2008.
 (4) English, not applicable.
 (5) Not available.
 (6) French, not applicable.
 Source: Eurostat (online data code: educ_lang), UNESCO Institute for Statistics (UIS), OECD

Fig. 5 Proportion of pupils in primary education learning foreign languages, by language 2010 (European Commission 2012)

In Hong Kong, the policy makers are committed to keeping English standards high in schools, society and workplace. English is taught as a subject in primary and secondary education, as a subject in the EMI stream, just as Chinese is taught as a subject in the CMI stream (Education and Manpower Bureau 2004: 11f). Although the MOI-related streaming of schools has been discontinued, there is no reason to assume that the mode in which lessons of English as a subject have been conducted so far – and the starting age for English lessons –will change.

5.1.8. Teachers

Teachers in Wannagat's example are bilingual in L1 and L2 and also qualified to teach both the subject matter and the L2 as subject. In Hong Kong, teachers are bilingual and qualified to teach the subject matter, but not necessarily the language.

As will be discussed in section 5.2.2, teacher qualification and evaluation in Europe is a matter of the countries in which the teachers are educated and employed. Some countries do not offer special training for CLIL, some require the teachers to

be fluent in both languages, in some the teachers, as seen in Wannagat's example above, have to be proficient in the language they are using for teaching as well as in the community language. They also have to be certified teachers for the content subject they are teaching and the L2 through which they are teaching. At the same time, there is no indication how exactly these qualifications influence the recruitment of CLIL teachers. The teachers L2 proficiency is tested individually according to the rules of the respective countries in which they are employed. (Eurydice 2006: 42).

Hong Kong's teachers, if educated in Hong Kong, invariably have some degree of English language skills, because most universities in Hong Kong are English-medium. The language skills of L2 teachers of English and Putonghua are tested by the Hong Kong Examinations and Assessment Authority in a test called the *Language Proficiency Assessment for Teachers* (LPAT). This test however only applies to language teachers and is voluntary for all subject teachers (Education Bureau 2012).

In both Europe and Hong Kong, there are voices debating the worth of increased exposure to native speaker teachers (Wolff 2009: 562) and schemes which serve to bring native teacher speakers into classes like Hong Kong's NET scheme.

5.1.9. Teacher training

Wannagat's study mentions that there is special teacher training for CLIL programmes available, while in Hong Kong there is no special training for teaching through EMI. Teacher training will be discussed in more depth in section 5.2.2.

In Europe, teacher training is generally governed regionally or nationally and differs from country to country. There is, however, a proposed framework for the professional development of CLIL teachers, *The European Framework for CLIL Teacher Education* (Marsh *et al* 2010: 3), which could help establish education schemes for registered teachers who want to teach CLIL classes and for students studying to become teachers with an additional CLIL qualification.

Hong Kong has so far relied on its EMI universities to train teachers in content subjects (including languages). With the policy Fine-tuning, there is again increased need for teachers who can teach in English, as schools seek to offer more classes in English. As a strategy to cope with curriculum requirements, the government's stance on code-mixing in class has been somewhat relaxed (Li; D. C. S. 2009: 80), and a new university course has been established, called 'Language across the Curriculum' Master of Education programme, which seeks to train content teachers who can teach in English (The University of Hong Kong Faculty of Education 2012).

5.1.10. Curriculum

Wannagat's study addresses history lessons in CLIL and EMI schools. The CLIL curriculum parallels the L1 curriculum with additions to accommodate the CLIL model. The Hong Kong EMI model has a curriculum for western history which does not take in account that the teaching takes place in a L2.

CLIL initiatives are, while popular, often school-based initiatives and thus do not effect changes to the official curriculum. This very often leads to teachers feeling being left alone to manage the added workload which comes with teaching through L2. Pavón Vázquez and Rubio call for a restructuring of the curriculum (Pavón Vázquez & Rubio 2010: 46), but a change in the curriculum of CLIL classes would make it more difficult for students who discover that they cannot study in a L2 to return to regular L1 curricula. The balancing of CLIL and L1 curricula – if they are not the same – calls for more research and evaluation.

Morris and Adamson discuss the importance of supportive environment for immersion education and "language policies that involve all teachers" (Morris 2010: 159). The curriculum policy for secondary schools in Hong Kong does not distinguish between EMI and CMI schools, which leads to the conclusion that both curricula must be the same, despite the difference in the MOI. There is no reason why this should change with the policy Fine-tuning, which ends the distinction between EMI and CMI schools (Curriculum Development Council 2009).

5.1.11. Course materials

The course materials used in this particular CLIL programme are designed for CLIL, but this is still unusual. The course materials for CLIL are only available in English. There is no mention of a framework for teachers and the language that is used in class is not defined further (Ziegelwanger 2007: 307). The EMI model in Hong Kong has course books designed for EMI classes.

Materials that are developed specifically for use in CLIL classes are still somewhat rare, and when they are developed, it is mostly for English medium CLIL. The development of such course books and curricula takes time, and since CLIL is a relatively new subject in terms of research, there is still a certain lack of teaching materials. The development of course books is at the moment in the hands of dedicated CLIL educationalists and linguists (Gierlinger 2007: 80-81).

Course material in Hong Kong has been subject to changing MOI policy in the past. Up until the Firm Guidance of 1997, course material has been in English, as was the *de iure* MOI in schools (Tung 1989: 59). Students had trouble understanding their course material and were sometimes confused by the continuous shift between the English-medium textbooks and Chinese-medium instruction (Cumming & Dickinson 1996b: 42). With the Firm Guidance, the need for Chinese textbooks increased, because most of the secondary schools were obliged to introduce Chinese as their MOI. Tung's survey among teachers shows that many were worried that they would not be enough good CMI textbooks (Tung 1989: 59-60). With the renewed change of policy towards more time dedicated to MOI in Hong Kong's CMI schools, it can be expected that there will be an increased need for more EMI textbooks. However as there has always existed an EMI stream in Hong Kong's schools, there is probably no need to write new EMI textbooks or to translate CMI textbooks to English.

5.1.12. Classroom culture

Wannagat's survey shows in the case of CLIL and EMI a classroom culture that is, to a great extent, identical to that of the local L1 community.

CLIL programmes are inclusive and not restricted to privileged groups. In mainstream education, they offer L2 immersion classes to students from the mainstream community, which means that the classroom culture is mostly that of the local L1 community (Eurydice 2006: 13f).

As Hong Kong has a 90,8 % Chinese speakers (Lee & Leung 2012: 11), it can be assumed that classroom culture is the same as the mainstream L1 culture.

It seems however much more important to discuss another point in connection with culture: the emergence of "plurilingual citizens in multilingual societies", which may lead to the fact that the local mainstream culture is not homogenous any longer and needs to be evaluated anew (Coyle 2010: 157).

5.1.13. Language environment

The Wannagat example shows that the language environment for both the CLIL class and the EMI class is dominated by L1, and that exposure to L2 is mainly in school context.

Lasagabaster and Sierra claim that CLIL programmes exposure is mainly in school context, while immersion programmes "are carried out in languages present in the students' context" (Lasagabaster & Sierra 2009: 370). This is a controversial point of view, especially in the view of the Swain and Johnson's volume *Immersion Education: International perspectives* (1997), in which there are examples of immersion models in which the students have little contact with the L2 outside of classroom (Somers & Surmont 2012: 114).

Wannagat's example only includes one CLIL model, but CLIL can go as far as to offer a second, heritage, or community language. Depending on the kind of language that

is used as MOI, the exposition time outside of classroom context is different for every programme. There are examples in which immersion programmes are situated in communities in which there is little exposure to the L2, and CLIL programmes in which the classroom language is that of parts of the local community (Maljers *et al* 2007, quoted in Somers & Surmont 2012: 114).

Some argue that immersion time for the L2 must be maximised in order to give students ample opportunity to engage in productive and receptive activities in the L2. Here, especially Hong Kong's MOI policy comes to mind, which insists on full immersion without code-mixing (Low & Lu 2006: 182). Swain *et al* (2011) however argue that the immersion time nowadays is expanded by exposition to other sources such as TV or even more, the internet (Swain *et al* 2011: 4).

5.2. CLIL and EMI issues discussed

There are several issues similar to both EMI in Hong Kong and CLIL in Europe. The field of language across the curriculum is varied and non-homogenous. Comparing CLIL and EMI as concepts is not the aim of this paper, much rather the pointing out of similar issues inherent to both systems. I have chosen two issues that are important to both EMI and CLIL – the matter of teacher education and the matter of a precise definition of the language which is used for teaching. Both are very important to the development and implementation of the concept of immersion education and languages across the curriculum.

Teachers aiming to teach content subjects through foreign languages face a multitude of challenges connected to the unique nature of this educational concept. While the implementation of languages across the curriculum has been going on for a very long time, research is only now catching up with practice and delivering valuable theoretical backing and teaching concepts. The need for special teacher education for teaching EMI and CLIL classes will be examined in the following section.

The second issue this thesis is concerned with is the need for a precise definition of the MOI used in EMI and CLIL education. In section 5.2.1., I will examine whether a precise definition of the MOI is needed for the successful integration of foreign languages in content subjects, where equal attention is paid to both content and language.

5.2.1. Planning of immersion curricula

The ways in which language is used in EMI and CLIL classes to convey content is a very important matter and yet so far they have not been clearly defined. While the issues examined in this thesis are language-centred; this does not mean that language in EMI and CLIL classes is or should be more important than content. The research question is as follows:

Do CLIL and EMI programmes need curricula which accommodate the dual focus of immersion education?

Clearly, there is no universal solution that fits all instruction models, students' age groups and medium languages.

The social situation in each country in general and decisions in educational policy in particular always have an effect, so there is no single blueprint of content and language integration that could be applied in the same way in different countries – no model is for export. (Baetens Beardsmore 1993: 39)

Similarly, there is no one didactic approach that could include all languages and the reasons why these particular languages are used as MOI – L2 English-medium instruction differs from L2 German-medium instruction, which differs from L2 Chinese-medium instruction, and all of these are different from L1 medium instruction. It is however important to create awareness that there is a need for further research into the use of languages in the classroom. This research, a framework that can help teachers decide individually how to meaningfully integrate the L2 medium in their content lessons, as well as curriculum planning, needs to include both language and content teachers. Coyle argues that a CLIL curriculum needs “collaborative planning and cross-disciplinary delivery” (Coyle 2010: 159), but

is often “left to chance or is dependent on the ‘goodwill’ of head teachers or senior management teams” (ibid).

5.2.1.1. Reasons for the use of languages across the curriculum

As touched upon in 2.4., both EMI and CLIL are policy-driven concepts, i.e., they depend on policy makers for resources and direction. Ziegelwanger argues:

Nicht fachdidaktische Überlegungen oder gar Erfordernisse, sondern fremdsprachenpolitische Entscheidungen führten zu dieser Unterrichtsform. (Ziegelwanger 2007: 293)

Aside from policy-driven reasons for languages across the curriculum, there are questions concerning the use of foreign languages as MOI that have so far been neglected; one of them being the question how an L2 is used in class.

In Hong Kong, English is used as MOI for a multitude of purposes: as a means of achieving the goal of “biliteracy and trilingualism” (Li, D. C. S. 2009: 76), having better chances to pass university entry exams and gain white-collar employment (Kan *et al* 2011: 14), as well as a matter of distinction between educated elites and the masses within Hong Kong (Kan & Adamson 2010: 163) and even for some as a way to establish a linguistic and cultural distance from mainland China (Lin 1996: 78).

CLIL programmes in Europe are also implemented for a reason: they aim for additive bilingualism (Wannagat 2007: 666), the development of cognitive skills and learning strategies which are not limited to language learning and use (Cummins 2001c: 30), and socio-political aims, e.g. empowerment of minority languages and promoting an international frame of mind in students (Eurydice 2006: 23).

It is not always easy to determine which is more important to policy makers: language or content. CLIL is often associated with language-related aims, as a model which is primarily focused on additional lesson time for languages (Eurydice 2006: 23), although CLIL programmes can be either language- or content-driven. Ideally, a CLIL programme has a dual focus which gives equal attention to content

and language acquisition. Ziegelwanger argues that in some CLIL programmes there is an emphasis on language: „hauptsächliche Schwerpunktsetzung auf die sprachlichen Chancen des Unterrichts“ (Ziegelwanger 2007: 294), while Dalton-Puffer and Smit claim that currently, most CLIL programmes in Europe are content-driven (Dalton-Puffer & Smit 2007: 12).

5.2.1.2 Which language, and when?

An important difference between a FL class and CLIL or EMI content classes is that the content of a FL class is the language itself, while in CLIL and EMI classes the language is not necessarily the content.

Zydatiś (2002) differentiates between phases of content-centred and functional-communicative language use in class. He points out that there is no indication how these phases should be balanced in the curriculum, and how much language instruction a content class should entail, as well as which parts of language instruction should be done in language class (Zydatiś 2002: 45). Dalton-Puffer goes as far as to say that in CLIL, while there is a general direction that students should immerse themselves in the L2, there is little in the way of definitions as how this immersion should look like in practice:

So gibt es bislang eher wenig Überlegungen hinsichtlich der Beschaffenheit des Sprachbades, in das die Lernenden im CLIL-Unterricht eintauchen und das ihre „allgemeine Zielsprachkompetenz“ verbessern soll. (Dalton-Puffer 2009: 5)

In Hong Kong, code-mixing and code-shifting has long been used as a survival strategy by teachers who had to use EMI but still make themselves understood to an audience of students who were not able or willing to engage in EMI (Cumming & Dickinson 1996b: 42). Code-mixing was widely practised, even after it had been declared detrimental to both the students' English proficiency and the acquisition of content, because the time spent on explanations in Chinese could not be used as immersion time for English (Johnson 1998 266). Hong Kong's Firm Guidance on language policy in schools allowed English-medium only in schools that could prove

that they were able to provide their students with English-only education and that their students could follow the lessons held only in English, outlawing code-switching and mixing in class. This approach seemed to achieve little change in EMI schools:

Although EMI teachers appear to have made a determined effort to implement the MOI policy, the findings of the present study do nevertheless indicate that classroom language practices in many reformed EMI schools fall short of the English-only immersion programme envisaged by policy makers. (Evans 2009: 305)

With the policy Fine-tuning, code-switching has been somewhat redeemed in the eyes of Hong Kong's policy makers, as shown in Swain *et al* (2011), where the benefits of the use of L1 for more efficiency, easier explanations and scaffolding are demonstrated (cf. Swain *et al* 2011).

In the paper *How to have a guilt-free life using Cantonese in the English class: A handbook for the English language teacher in Hong Kong*, Swain *et al* (2011) offer Hong Kong teachers solutions for their language-switching dilemma. Language-switching, which has been always used in Hong Kong's supposedly English-medium schools and classes, is now being introduced as an asset and a useful tool for teaching which helps teachers make themselves understood and helps avoid wasting time on roundabout explanations when everyone in class is trying to make sense of the English utterance, while a short explanation in Chinese would suffice and help activate vocabulary by way of associations in the mother tongue. Language mixing and switching is supposed to help the lessons move along. The Chinese language in class is supposed to 'scaffold' understanding and thus make it easier for the students to acquire content as well as language (Swain *et al* 2011).

Arguments for the "English-only" policy in class used to be the need for maximum exposure to English (which is supposedly minimised when Chinese is spoken) and interference with Chinese.

Maximum exposure however is useless if the students do not understand what is being said, because without comprehension they are unlikely to learn it. With the emergence of the internet, potential for immersion has increased manifold (Swain

et al 2011: 6). The interference of languages in class might be stopped by rigid policy, but the interference in the students' brains will not be prevented by policy (Swain *et al* 2011: 4).

Swain *et al* provide arguments for language-switching in class such as the importance of the language as a cognitive tool. The first language is the one in which we think best, so allowing the brain to alloy words in one language with meanings from another seems to be a good idea (2011: 6). They also challenge the notion that only a native speaker model is one worth acquiring, pointing out that multilingualism is today's norm and the teachers in Hong Kong embody attainable models for their students and should teach (in) a variety of English which is useful as a lingua franca, instead of persisting on an imported and often unattainable native speaker model (Swain *et al* 2011: 6-7).

Teaching in FL has a social, cultural, and linguistic significance; the choice of the language goes deeper than determining the most popular and useful foreign language available at the moment. It is important to determine what constitutes the MOI used in class: institutional and vernacular exchanges, teaching, talk among students – be it class-oriented or private, things that teachers say outside the curriculum content taught in class, such as discipline, directions, or private talk. Is every word that is said in class – discipline, discussions, questions, explanations of vocabulary – supposed to be included in the definition of MOI? Should L2 be used for everything, and if not, how much L1 can be used in such programmes before they cannot be defined as L2-medium or language-integrated?

Code-switching is a helpful tool, but to call a programme EMI or CLIL, some measure of L2 should be integrated in class. Costa and D'Angelo propose that at least 50 % of lesson time should be in L2, and that this time should be gradually expanded to at least 90 % and also argue that that code-switching "should occur in predictable and/or structured moments" (Costa & D'Angelo 2011: 7).

Swain *et al* offer a comprehensive model of opportunities in which code-switching can be appropriate (2011: 6f). The model is meant for English language lessons in

class, but appears to be an adaptable model for EMI content classes. In their model they suggest that Chinese could be used to:

1. “Make content comprehensible.” Teachers build from the known and use content which is already familiar to the students from their Chinese lessons; they use cross-linguistic comparisons and provide quick translations from one language to another. ((Swain *et al* 2011: 6-12);
2. “Focus on student process and product in task completion.” Task activities can be completed by using both languages. (Swain *et al* 2011: 13)

It is worth mentioning that although this thesis is focused on a two-language dualism in class, the world is moving toward increasingly multilingual class settings, where code-switching will become the norm rather than exception. This leads to a setting where “[t]he learners’ languages – first language, second language, foreign language, heritage language and so on – all connect and can be exploited as tools for learning” (Coonan 2008: 159) and

[t]he effects of code switching between languages in CLIL settings [can be used as] a positive pedagogic strategy, rather than a default position to address breakdowns in comprehension (ibid).

Valuable research has been done on classroom discourse in language class which can be used to reflect on immersion class discourse. Gil differentiates between “natural and pedagogical” interaction (Gil 2002: 273). Much of this research has been based on the premise that students should be immersed in natural interaction in language class (ibid). Walsh puts forth the idea that “good teaching” consists in equal parts of planning and improvisation, and that a balance between both is important for FL teaching (Walsh 2006: 19). Language teaching takes place between input, discourse and negotiation of meaning (Walsh 2006: 23). Johnson *et al* show that language shifts in class are also function shifts – e.g. when L2 is used for input, and L1 is used for discipline (Johnson *et al* 1985, quoted in Bruce 1990: 11).

There is no consensus on how to achieve the ideal balance between content and language in immersion education. In order to enable teachers to act in their students’ best interests and allow them to reap the benefits of immersion education, the language goals and integration in content subjects should be defined

as precisely as possible to allow teachers to plan their content and language instruction, while staying flexible enough for improvisation.

5.2.1.3. Outlook

To determine how language is to be defined in CLIL and EMI settings, Curriculum planners should take the following questions into consideration:

How is the language used in L2-teaching defined in itself and what is the final desired outcome of teaching in an L2 for every particular class and education in general?

Does the curriculum require the teachers to teach and the students to study in a certain 'native' variety; is there a codified nativised variety available which can be used instead?

Is the language used in class simplified, does it require technical terms not normally used in conversation and which level of formality should it convey?

Are immersion programmes aiming at a students' proficiency which focuses on the development of a professional vocabulary, e.g. for engineering, or are they supposed to learn a language that can serve a multitude of purposes, which are largely unpredictable? The language used in class serves many purposes – these should be clearly spelled out: social advancement, university entry, distinction, additive bilingualism, cognitive development, empowerment or an increased understanding of other nations and cultures.

The answers to these questions must come from empirical research and informed thinking about these matters, not from policy makers, and have in mind the best interests of learners. As Kirkpatrick argues, 'local institutional bilingual targets' (2007: 379) must be set and followed through. The target languages should be clearly defined within the confines of the content curriculum. The teachers should know where it is appropriate to switch codes and where it is not, and have teaching materials and methodical approaches ready for use in immersion class.

As having a native speaker of a target language in every immersion class is not realistic, the curriculum goals should be determined along the lines of the best possible attainable goal. Also, the worth of native speaker teachers is, in my opinion, somewhat exaggerated, because learners do not always aim for native-like competence. This can be seen most clearly in the teaching of English, where native speaker teachers are valued the most, while English at the same time is becoming the world's lingua franca, where speaking a functional variety that is widely understood is more important than sounding 'native-like' (cf. Seidlhofer 2011).

5.2.2. Teacher education

One of the issues examined here is teacher education in connection with immersion education and teaching in foreign languages, as it is assumed that teaching content in a foreign language needs a different concept of teaching than teaching in the first language. This concept should take into account that both content and language need to be acquired and that the teachers' proficiency should be assessed prior to teaching. The research question is formulated as follows:

Special and/or additional qualifications for teachers teaching content through L2 in EMI or CLIL – should they exist?

In the next two sections, I will discuss the current teacher education opportunities in Hong Kong and Europe respectively.

5.2.2.1. Teacher education in Hong Kong

Teacher education in Hong Kong is for the most part provided by teacher education institutions: the Hong Kong Baptist University, the Chinese University of Hong Kong, the University of Hong Kong, the Open University of Hong Kong and the Hong Kong Institute of Education (cf. The Hong Kong Teacher's Centre 2012). Most of these institutions offering teaching degrees are English-medium, as the changes of MOI in the 1997 Firm Guidance only applied to secondary education (cf. Panel on

Education 1997). Since 1998, teachers have been taught in English and are required to teach in Chinese. In order to be registered and/or permitted as a teacher in Hong Kong, graduates have to provide an “approved degree of a specified institution together with an approved teacher’s diploma, certificate, or like qualification to teach” (Current English Ordinance & Subject Legislation 2012: p. reg. 68). In short, the Hong Kong Education Bureau requires all permitted teachers in Hong Kong to be “professionally trained and degree holders” (Education Bureau 2006).

The only foreign languages in Hong Kong are English and Putonghua, with English being far more important, as seen in the Fine-tuning of Hong Kong’s education policy (Education Bureau 2009b). The Education Bureau sets language proficiency requirements in English and Putonghua for teachers of these languages (*ibid*). All other teachers may take the Language Proficiency Assessment for Teachers, which includes a test of reading, writing, speaking and listening skills as well as classroom language assessment. The latter is only assessed for English and Putonghua teachers. (Education Bureau 2012)

For students entering tertiary education (including teacher education programmes), “a pass grade in English is the minimum requirement, with many programmes requiring a higher grade” (Kan *et al* 2011: 14), with most universities being English-medium (*ibid*). The Fine-tuning of Hong Kong’s education policy has made foreign-language provision in class more desirable again, because the bifurcation of senior secondary classes into English and Chinese streams has been abandoned and the provision for more English-medium courses has been reintroduced (cf. Education Bureau 2009a). The increased exposure to English will be decided upon by schools individually (Education Bureau 2009a: 5). This means that the demand for teachers who can teach in English will grow again, while there is still need for a clearly formulated didactic framework for teaching content in foreign languages that can be taught to future teachers and provided as support for serving teachers.

The only programme currently concerned with languages across the curriculum in Hong Kong is fairly new. Since 2012, the Hong Kong University’s Faculty of

Education has been offering a 'Language across the Curriculum' Master of Education programme, which:

[i]s designed for content teachers who are directly involved in English medium (EMI) teaching as well as English language teachers who are involved in supporting EMI content teaching in their schools. It aims to provide both content and language teachers with the linguistic principles and knowledge to develop and implement language across the curriculum (LAC) initiatives in their schools to improve both English academic literacy instruction and EMI content instruction. (The University of Hong Kong Faculty of Education 2012)

This programme is a response to the Fine-tuning and the increased demand in Hong Kong for content teachers who can teach in the English language. It offers three specialist modules, one for science and mathematics teachers, one for social sciences and humanities and one for bridging pedagogy in "school-based language across the curriculum" (ibid). It is the only university programme in Hong Kong which is concerned with the special case of teacher training for immersion programmes.

The Hong Kong Education Bureau offers language support for EMI education to teachers in service. The *Development of Language Across the Curriculum for English-medium Education* (DOLACEE) project offers workshops to content teachers who wish to teach in English. The project's objective is to "provide language support to teachers across the curriculum and to help create a more English-rich environment in participating schools" (Education Bureau 2010), which is a commendable cause in itself. Unfortunately, the project's rationale above also points towards Hong Kong's propensity to aim for English at the cost of everything else, including mother tongue and content subjects.

5.2.2.2. Teacher education in Europe (CLIL)

The qualifications and recruitment criteria for CLIL teachers in the EU are not regulated centrally by the EU, but by the countries, as Europe in its entirety is an area with diverse education models and educational needs.

[t]here is no official indication of the necessary level of competence in the foreign language used as a Medium of Instruction that a CLIL teacher needs to possess in order to work in CLIL programmes [...] (Coonan 2008: 14)

It is assumed that teaching in a foreign language requires the teacher to have a good command of the Medium of Instruction. Most countries do not require a teaching degree in the MOI nor do they provide special education, in-service training and further qualification opportunities for CLIL classes. There are calls for performance language testing of teachers, which would include tests of the L2 while it used in class. This, so Ludbrook (2008), would allow testing of teachers' proficiency in real-life situations and their ability to use authentic language that serves a real communicative purpose (Ludbrook 2008: 262-263).

Much of the CLIL research is centred on acquisition of content and language as opposed to the teaching of content and language. This shifts the classroom focus from teacher-centred to student-centred learning, because the teachers must take note of whether they are understood by their students, and must adapt to the circumstances. (Ting 2011: 314)

As there is no central framework for CLIL teachers, the knowledge of the MOI is sometimes self-assessed; sometimes the teachers must take a language test or examination prior to teaching in the L2. (Eurydice 2006: 45). Teachers who feel qualified to teach in foreign languages are usually allowed to introduce teaching through L2 in their classes, as CLIL is generally perceived as a "modern, popular and encouraging innovation in teaching and learning" and schools are eager to introduce L2 in their curricula (Ziegelwanger 2007: 291).

The benefits of CLIL can only be utilised if there is a supply of quality CLIL teachers. Coyle feels that CLIL is not sustainable without attention being paid to

“implementing strategies for training the professional workforce” (Coyle 2010: 161) which will result in an increased number of multilingual teachers. She also fears that poor quality CLIL could result in students’ wasting time on useless language-learning efforts and and calls for “urgent and significant changes” in the way teachers are trained to teach through L2 (ibid).

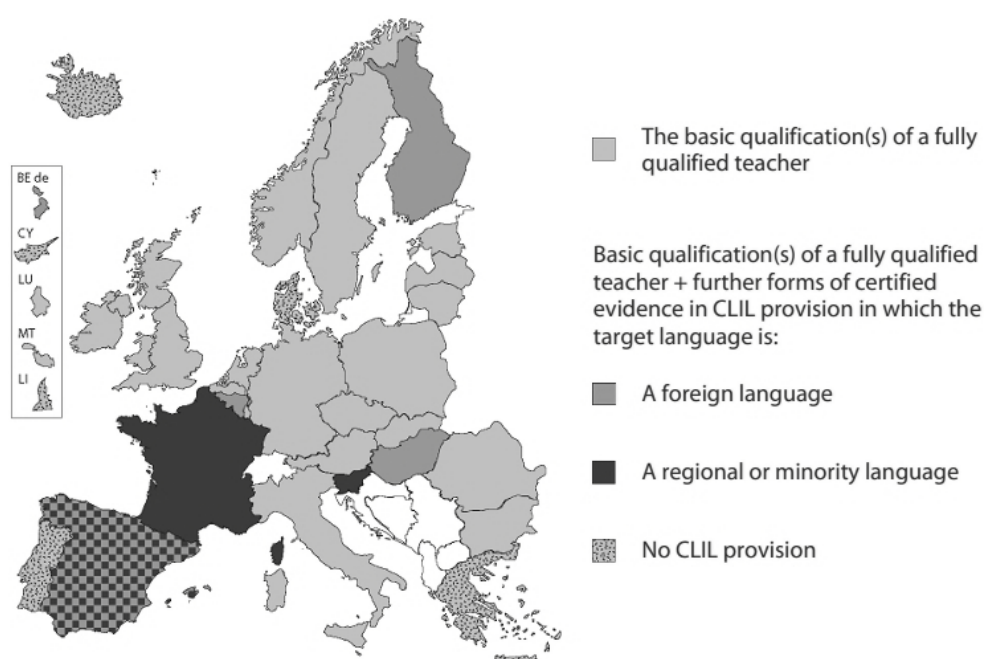


Fig. 6 Qualifications required for teaching in CLIL provision in primary education (ISCED 1) and general secondary education (ISCED 2 and 3), 2004/05 (Eurydice 2006: 42)

As seen in Fig. 4, teachers in most EU countries do not require special language training or CLIL training to teach in a foreign language, which is worrying, as Coonan states: “[C]LIL programmes are just too important, on account of the many issues they bring with them, to be left out of some kind of quality assurance control [...]” (Coonan 2008: 15)

Eurydice identifies two possible reasons for the lack of specific CLIL requirements; in some countries where minority languages are taught, bilingual education has been the norm for a long time and does not seem to require additional expansion.

In other countries, it has not been implemented long enough for the respective countries to develop an elaborate support system in teacher education (Eurydice 2006: 43).

Some countries have started programmes for teacher CLIL qualification: France, Germany and UK. However, while a CLIL qualification has some influence on employment, it is not a prerequisite for teaching CLIL classes.

There seem to be initiatives to improve CLIL teacher education. *The European Framework for CLIL Teacher Education* project is a non-prescriptive aid for teachers in CLIL class. It is intended to provide teachers with ideas how to create and implement CLIL curricula as well as how to estimate their students' competence and develop learner autonomy (Frigols Martin 2011: 402) and a proposed framework for teacher education that "aims to provide a set of principles and ideas for designing CLIL professional development curricula" (Marsh *et al* 2010: 3).

5.2.2.3. Challenges in teacher education

As seen in previous sections, teachers working in immersion programmes in both Hong Kong in Europe are required to speak the L2 through which they are teaching, and very often they are obliged to obtain certification in this language. However the opportunities to study teaching through an L2 are rare, and there seems to be a lack of awareness that teaching content in a foreign language differs from teaching in the first language. There is a need for further education of teachers who aim to teach in other languages.

[v]ery little attention has been given to the relationship between content and language in teacher education programmes [...] teachers themselves are not taught how to model and present language items essential for the appropriate discussion of subject content. (O'Halloran 2000: 153)

The lack of teaching materials, education initiatives for teachers, monitoring and assessment makes it difficult to achieve meaningful results with additional languages in teaching. The difficulties for studying through foreign languages

include students not wanting to study in and having difficulties understanding content in the L2. For teachers, it is sometimes difficult explaining content in the L2 (especially when there is no specific training for teaching through L2) and having to write their own materials for lack of existing textbooks dedicated to teaching content subjects through L2 (Deller & Price 2007, quoted in Arnold 2010: 231). Although Arnold only mentions English, it can be said that teaching content through any foreign language carries similar difficulties.

Content teachers in Hong Kong have been taught to teach in Chinese, because since the Firm Guidance (1997), most of the schools have been using CMI. Most of them are not language teachers as well as content teachers, which means that after the policy Fine-tuning (2011) takes place, which allows for more English-medium lessons within the curriculum, these teachers will require further training. As additional training requires additional financial and time resources, Hong Kong may well end up with a shortage of qualified teachers who can meaningfully implement a foreign language in their classroom. (Kan *et al* 2011: 13)

Apart from the need to teach content in a FL, teachers have to be able to speak it themselves. Eurydice lists criteria for CLIL teachers; they should:

- be a mother-tongue speaker of the target language;
 - have studied in the target language;
 - have followed in-service training in CLIL methodology;
 - have acquired some certification of their knowledge of the target language
- (Eurydice 2006: 45, Fig. 4.3)

It is a popular opinion repeatedly expressed by many policy makers that only native speakers of a particular language should teach CLIL classes in order to avoid “unnaturalness” of speaking in a foreign language to students with whom the teacher shares the L1 (cf. Smith 2005). While I agree that teacher evaluation is important for quality assurance of L2 medium programmes, it is difficult to say how models as popular as EMI or CLIL are supposed to come by as many native speaker content teachers as are needed. A native speaker teacher also does not guarantee that the students will acquire the target language better and more efficiently than with a non-native speaker teacher, as native speaker teachers carry their own

difficulties (cf. Widdowson 2003b). Instead of looking at unattainable goals, it is much more important to clearly define the level of proficiency in the target language that is needed for content teaching, train teachers to (at least) this level of proficiency and evaluate them prior to teaching. “It is important [...] to define the term ‘local institutional bilingual targets’” (Kirkpatrick 2007: 379).

Lasagabaster and Sierra, who, other than this paper, distinguish between immersion and CLIL models, claim that the objectives of immersion models are to teach the students native-like language skills, while CLIL programmes “cannot have such a far-reaching objective” (Lasagabaster & Sierra 2009: 372). Expecting that all students attending an immersion programme – be it an EMI school in Hong Kong or a CLIL class in Europe – achieve, or even want to achieve native-like proficiency in the MOI would set unattainable goals for language learners and their teachers.

Teachers need to follow their content’s subject curriculum. Content curricula that are too demanding can lead to increased attention being paid to content acquisition at the cost of immersion time and language acquisition. On the other hand, if CLIL lessons are too language-centred, the demands of the content curriculum will not be fulfilled. Dalton-Puffer argues:

At present, at least in Austria, a CLIL curriculum is defined entirely through the curricula of the content subjects, with the tacit assumption that there will be incidental language gains. (Dalton-Puffer 2007: 295)

Teaching content includes “the guided construction of knowledge” (Mercer 1995: 1). Teachers need to “guide” students in their “construction of knowledge”, adding to their knowledge in their particular domain with its particular vocabulary. This needs to happen in a foreign language, which is a challenge in itself, and adds to the demands on teacher training (ZydatiB 2002: 42-3).

There is a need for teacher education approaches that will allow teachers to integrate content and language in equal parts in their teaching, a curriculum that will ignore neither and allow the teachers to meaningfully teach through foreign languages. Teachers who have not been trained to teach content in foreign languages are likely to find it difficult to fulfil this need.

The lack of a didactic framework for languages across the curriculum puts teachers in the unenviable situation of having to balance content and language without a theoretical background. Ziegelwanger (2007) examines the problem from a point of view of history teachers teaching in English:

Aus der Praxis heraus entwickelt, fehlen dem bilingualen Geschichtsunterricht theoretische Grundlagen in Didaktik und Lerntheorie. Die Lehrkräfte sind auf sich alleine gestellt, sinnvolle Entscheidungen in diesen Bereichen zu treffen und den Unterricht eigenverantwortlich zu gestalten. Hier haben die DidaktikerInnen an den Hochschulen die PraktikerInnen bis jetzt mehr oder weniger alleine gelassen. (Ziegelwanger 2007: 306)

This entails not only the balancing content and language without a clear framework, but also, for those teaching content subjects with materials that have not been adapted for use in L2-classes, an increased workload and preparation time. There is also some anxiety that the goals of the regular L1 curriculum of the content subject may not be reached if too much time is spent on establishing satisfactory language levels in class:

“Besonders in den niedrigeren Altersstufen, in den Anfangsphasen und beim modularen bilingualen Unterricht ergibt sich das Problem der Diskrepanz zwischen inhaltlich-fachlichen und sprachlichen Kompetenzen der SchülerInnen. Die sprachliche Kompetenz [...] reicht nicht immer aus ihr inhaltlich-fachliches Wissen gleichwertig auszudrücken, beziehungsweise fremdsprachliche Materialien so zu verwerten, wie sie es in ihrer Muttersprache könnten.“ (Ziegelwanger 2007: 307)

Coyle proposes an inquiry-based approach to practice of CLIL-teaching, where teachers provide empirical data collected in classrooms, which can then be used to build a theoretical framework and help design a curriculum which has the added value of having been tested in practical situations (Coyle 2010: 44).

5.2.2.4. Outlook

It cannot be assumed that the acquisition of language in class will happen automatically and/or accidentally – Dalton-Puffer speaks of incidental language gains (Dalton-Puffer 2007: 295) – as long as the teachers simply speak the foreign

language while teaching content subjects. There is, for the most part, no or little attention paid to furthering content teachers' education (on how to teach content subjects in a foreign language) and there are few textbooks that are written with the express purpose of being used in CLIL or EMI classes.

Researchers in Europe and Hong Kong have made a promising start and are continuing research into languages across the curriculum. *The European Framework for Teacher Education* (Marsh *et al* 2010) and Hong Kong's *A Handbook for the English Language Teacher in Hong Kong* (Swain *et al* 2011) are valuable resources for teaching content through foreign languages, as they are, on the one hand, giving pointers to teacher professionalization in teaching through L2 and on the other pointing out the need to distinguish between the language as a content subject and the language as the Medium of Instruction.

Teaching through foreign languages is inevitably different for every teacher, every subject, every classroom and every country. It is important to view teaching practice from a practical and theoretical point of view as well as from viewpoints of different content subjects (Ziegelwanger 2007: 320).

As the actual teaching through foreign languages started long before research into this topic has had the chance to yield serious results, the application of "the theory of practice" (Coyle 2010: 45) seems to be a reasonable approach to solving the pressing issue of the lack of special teacher training for immersion models.

A theory of practice emerges when the teacher begins to articulate his or her implicit knowledge and understanding about teaching and learning. The teacher's implicit knowledge becomes explicit through this process – that is, the teacher is aware of his or her own knowledge [...] and can begin to actively develop this. (Coyle 2010: 45)

Ideally by comparison and further research, and a combination of theory and experience gathered in practical classroom situations, a scheme for teacher education and evaluation can be assembled.

It is important to remember that teaching through foreign languages is different for every country (Baetens Beardsmore 1993: 39). The solutions for issues in European

countries cannot be the solutions for issues in Hong Kong, but by taking note of issues elsewhere and looking at their approaches; both can learn from the other and work on their own solutions.

5.2.3. Revisiting the research questions

The first research question of this thesis was: Do CLIL and EMI programmes need curricula which accommodate the dual focus of immersion education? The answer to this question is found in the current state of affairs as it presents itself at the moment in Hong Kong and Europe.

Teaching content through L2 is a popular concept which seems to offer many benefits for students as it increases the immersion time in an L2 and at the same time offers the opportunity to practise language use with a communicative purpose (cf. Baetens Beardsmore 2013). At the moment, immersion programmes in Europe and Hong Kong are just entering mainstream education, which means that curricula yet have to be adapted to accommodate this approach. In Europe, the approach has been popular only since the 1990s (cf. Fortanet-Gómez & Ruiz-Garrido 2009), and Hong Kong has only recently re-introduced EMI in mainstream education, this time as a partial immersion model as opposed to the earlier full immersion model (cf. Kan *et al* 2011).

Adapting curricula to accommodate languages across the curriculum affords the policy makers' compliance, monetary resources and further research, as well as understanding that in order to formulate a curriculum, at least some of the questions I posed in section 5.2.2.4. should be answered, with the awareness that teaching content through L2 differs from teaching content through L1.

The second research question of my thesis was: 1. Special and/or additional qualifications for teachers teaching content through L2 in EMI or CLIL – should they exist?

Teaching differs not only from country to country but also from one classroom and subject to another. It is important to enable teachers to act flexibly according to their particular situation while keeping the curriculum in mind, and to evaluate their ability to do so.

The former can be accomplished by providing teachers with a solid education and/or in-service training, teaching materials which are tailored for teaching content through L2 and a curriculum which supports the dual-focused aims of an immersion programme. The latter can be accomplished through establishment of (attainable) language goals for future teachers and teachers in service as well as the evaluation and testing of teachers before and during service.

6. Conclusion

The aim of this thesis has been to compare two types of immersion education – CLIL programmes in Europe and Hong Kong's EMI programme in order to identify similarities between these two immersion programmes. Both programmes display a number of similar problems and issues. In my thesis, I look at the issues of curriculum planning and teacher education in Hong Kong and Europe and suggest that issues that are only now arising in CLIL could be looked at by way of comparison with Hong Kong's history of L2 immersion, and vice versa, as both models have much to gain from each other's insight and experience.

The thesis begins with the definition of terms 'Medium of Instruction', 'CLIL', and 'immersion education'. These terms are widely used in literature, and there seems to be a consensus as to what they mean in general, but the meaning and exact definitions of these terms – especially 'Medium of Instruction' – is rarely, if ever, discussed in detail as to what exactly they signify for language teaching and acquisition.

Having examined these terms, I look into whether CLIL (Europe) and MOI (Hong Kong) can be compared. For this, I have used a list of characteristics of immersion education provided by Johnson and Swain (1997a) to compare CLIL and MOI along these defining features of immersion models and have found that despite some differences, CLIL models in Europe and MOI as it is conducted in Hong Kong are indeed comparable.

Both CLIL and EMI are policy-driven models, as they depend on the goodwill of policy-makers for financing and approval and therefore need to advertise their advantages in respect to their usefulness (Marsh & Langé 2013: 148) – which is, for example, achieved by supposedly quick, efficient and inexpensive learning of high prestige languages. Both models have their advantages and drawbacks, as can be seen in Hong Kong's long time efforts to introduce full English immersion (cf. Evans 2011) and the popularity and prestige that immersion models enjoy in Europe (cf. Ziegelwanger 2007) and around the world. The popularity of immersion models

around the world is briefly discussed as English immersion models in former British colonies in Asia and Africa are described, before attention is turned to the history of CLIL in Europe and EMI in Hong Kong. For research on these topics see also Brock-Utne (2010), Muthwii & Kioko (2001), Gill (2003) and Annamalai (2004).

CLIL is a fairly new concept. It has been implemented in Europe, sometimes to give students access to their hereditary languages, or in border regions in which more than one language is spoken. There are also programmes which aim to empower speakers of minority languages and those that are aiming for additive bilingualism (cf. Eurydice 2006). Another benefit of CLIL is the development of additional cognitive skills, as by learning through an L2, students are acquiring content by adopting techniques for learning and understanding would not need to employ for studying through their L1 (cf. Cummins & Swain 1986 and Niemeier 1999). CLIL is very popular in Europe, as it seems to offer additive bilingualism at no additional monetary cost to schools, policy makers and states while at the same time expanding time which can be spent on learning foreign languages (cf. Zydatiś 2002).

Hong Kong has had a long history of teaching through English. At first a bridging language which was only taught to a select few who were then able to act as intermediaries between the colonisers and the local community, it quickly became a means of social advancement (cf. Evans 2008b). Despite warnings of several inquiring commissions that studying exclusively in L2 was detrimental to the development of L1, the students' cognitive development and the acquisition of content, an overwhelming majority of schools in Hong Kong were determined to offer full immersion schooling to as many students as possible in order to attract the best students (cf. Tsui 2004). In practice, Hong Kong's schools were very often *de iure* English-medium and *de facto* Chinese-medium (cf. Shek 1991). The return of Hong Kong to the PRC was marked by a strict new CMI policy for all but a small number of schools that could prove that their teachers were able to provide quality EMI and their students able to study through L2. The new policy was met by public outrage, but it remained in place nevertheless. The remaining EMI schools were overrun with students wanting to study through English-medium (cf. Tse 2001). The language of the new administration, Putonghua, was also introduced in Hong

Kong's official new language policy, although its influence on the school system and society has yet to show (cf. Li, D. C. S. 2009). All schools were streamed either into the EMI or CMI streams, and it became a matter of honour to attend an EMI school (cf. Evans 2000). Hong Kong's administration started monitoring and re-evaluating the Firm Guidance policy almost as soon as it was passed in 1997, and after some adjustments, a policy Fine-tuning was decided upon, which brought an end to the bifurcation of CMI and EMI streams and will allow for an increased number of EMI classes in Hong Kong's mother tongue schools (cf. Kan *et al* 2011). Time will tell how Hong Kong's schools and students will fare with the increased amount of English in their schools. This re-insertion of English into CMI schools makes the Hong Kong model quite similar to CLIL, as it is only a partial immersion instead of a full immersion model.

The thesis continues with a comparison of the CLIL and EMI models by Wannagat (2007). His model is concerned with history classes in Germany and Hong Kong. I have used his criteria for comparison between CLIL in Europe and MOI in Hong Kong in section 5.1. to assess the theoretical models CLIL and EMI.

The comparison shows that both models are comparable and quite similar in several points like L2 exposure, students' L2 proficiency, teacher training, course materials, etc. The comparison unfortunately also shows that both programmes are similar mostly in the things on which they both need to expand, among others on curricula which accommodate teaching through L2, course materials that are written for teaching in an L2 that take their intended use in consideration, teacher training that prepares teachers to convey content through a foreign language, teacher evaluation that evaluates the teachers' L2 proficiency, their ability to teach the content and finally, their ability to use L2 to teach the content.

In the final chapter, I have discussed two issues that are important to the further development of both programmes: Curriculum planning and teacher education.

The MOI in class should be used for the benefit of the students. If the MOI is an L2, it should serve to help them acquire the language, increase exposure to L2, develop further cognitive skills and to help them become aware of the plurilingual,

multicultural nature of the world around them (cf. Coyle 2010). The benefits and goals of immersion programmes for students should be clearly defined and put forward. It is important to determine which part of immersion education should be prioritised: content or language, and/or how to find a balance between the two.

This can be achieved by further research into languages across the curriculum, by following the most pressing questions that present themselves to practitioners of CLIL and EMI such as the role of code-switching and multilingualism in class, the definition of the language used in class itself and the desired outcome of teaching through L2. Furthermore, it is important to set attainable goals for immersion education. The importance of native speaker teachers, which Costa & D'Angelo (2011) advocate, as does the Hong Kong administration, as shown by the NET scheme (cf. Education and Manpower Bureau 2006) may be exaggerated in this case, as qualified content teachers who are at the same time native speakers of a desired MOI language are somewhat rare and not entirely without drawbacks (cf. Widdowson 2003). Looking into more realistic options should be considered in this case, as acquiring a native-like competence in an L2 should not be the only aim of languages across the curriculum (cf. Kirkpatrick 2007). Languages across the curriculum can be beneficial for the students, as it follows the dual-focused goals of content and language acquisition, combined with the development of cognitive skills, but it can be detrimental to their schooling and end in frustration if it is not planned out with clear language and content goals (cf. Coyle, 2010). A curriculum of an immersion programme should be planned with all of the above issues in mind.

The idea that teaching content subjects through foreign languages could require more from teachers than speaking said languages is fairly new. The popularity of the immersion concept has – at least in Europe – always been ahead of the research. Right now, teachers are very often left alone with their immersion classes and have to put in extra work if they wish to offer meaningful immersion to their students. There are few course materials that are written with the exact purpose of being used in content classes, and few training initiatives for teachers (cf. Ziegelwanger 2007). There are projects which aim to remedy this situation by offering a non-prescriptive framework for CLIL teachers, e.g. the *European*

Framework for CLIL Teacher Education. A framework for the professional development of CLIL teachers (Marsh *et al* 2010), which hopes to aid teachers and policy makers alike. In Hong Kong, *A Handbook for the English Language Teacher in Hong Kong* (Swain *et al* 2011) is a good start, as is the 'Language across the Curriculum' Master of Education programme in Hong Kong, which seeks to train content teachers who then can teach in English (cf. The University of Hong Kong Faculty of Education 2012). Neither in Europe nor in Hong Kong, however, are there compulsory educational schemes for teachers offering L2 immersion content classes. One reason for this may be that offering additional training for teachers is costly, the other reason may be that teachers who can successfully teach through L2 are still somewhat rare and a third reason could be that in order to train teachers, first there must be a curriculum for teaching through L2.

Both EMI and CLIL give reason for hope that the teaching through L2 will improve in quality as time goes by, because the current initiatives in curriculum development and teacher training through "theory of practice" (Coyle 2010: 45) are working from practice to theory to build a sound theoretical footing for a promising teaching concept which includes new language(s) in the curriculum while upholding the L1 and following the dual-focused aims of languages across the curriculum. Both Europe and Hong Kong stand to learn a lot from each other, because while they are completely different settings, they face similar problems which are inherent to the type of immersion programmes which can be found in Europe and Hong Kong.

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Summary in German

Diese Arbeit beschäftigt sich mit Gemeinsamkeiten der Konzepte des Unterrichts in Fremdsprachen „Content and Language Integrated Learning“ (CLIL) in Europa und „English Medium Instruction“ (EMI) wie es in Hong Kong praktiziert wird.

CLIL ist ein relativ neuer Überbegriff für viele Arten von Immersionsunterricht, der erst seit 1994 in Europa verwendet wird, obwohl Immersionsunterricht in vielen Formen bereits länger praktiziert wurde. EMI wird in Hong Kong nunmehr seit mehr als 100 Jahren mit wechselndem Erfolg in die Praxis umgesetzt und wurde seit jeher von zahlreichen Wechseln in der diesbezüglichen Gesetzgebung begleitet.

CLIL und EMI sind Immersionsmodelle, die in ihrem theoretischen Aufbau einige Ähnlichkeiten aufweisen. Daher begegnen sie auch ähnlichen Schwierigkeiten in der praktischen Umsetzung des Unterrichts in einer Fremdsprache.

In dieser Arbeit werden zwei vorrangige Fragestellungen behandelt, denen CLIL und EMI begegnen. Bei der ersten Fragestellung handelt es sich um die Definition eines Curriculums, in dem der Einsatz der Fremdsprache im Sachfachunterricht Beachtung findet. Der Integration der Sprache, des Sachfachs und der Entwicklung der kognitiven Fertigkeiten der Schüler soll in der Entwicklung des Curriculums Raum gegeben werden.

Die zweite Fragestellung beschäftigt sich mit der gezielten Ausbildung von Lehrern, die in einer Fremdsprache unterrichten können/sollen, und der Schaffung des Bewusstseins dass das Lehren in und durch Fremdsprachen nicht mit dem Lehren in L1 gleichzusetzen ist und daher eigene methodische Ansätze und Zugänge braucht, um den Schülern sinnvollen bilingualen Immersionsunterricht zu bieten.

Diese Arbeit soll aufzeigen, dass beide Unterrichtsmodelle aufgrund ihrer Ähnlichkeit gegenseitig auf die Problemlösungsmechanismen und wissenschaftliche Forschung des anderen zugreifen können.

Summary in English

This paper is concerned with the commonalities of the concepts of teaching through foreign languages “Content and Language Integrated Learning” (CLIL) in Europe and “English Medium Instruction” (EMI) as practised in Hong Kong

CLIL is a relatively new umbrella term for many kinds of immersion programmes. Although language immersion has been practised in schools for a long time, the term CLIL has been used in Europe only since 1994. EMI has been used in Hong Kong for over 100 years, where it has been implemented with varying degrees of success and characterised by frequent changes in Hong Kong’s Medium of Instruction policy.

CLIL and EMI are both immersion models and exhibit a number of structural similarities. Therefore they are bound to face similar issues in their implementation.

The focus of this paper will be on two important issues that CLIL and EMI have to face. The first issue is the planning of a curriculum that accommodates the dual focus of immersion education. The integration of language and content, as well as the development of additional cognitive skills should all be considered in the formulation of such a curriculum.

The second issue is that of educating teachers who are able to teach content subjects through L2, accounting for the idea that teaching content through a L2 is not the same as teaching content through L2. The latter needs its own teaching methods in order to offer meaningful immersion education to students.

This paper aims to show that both immersion models, due to their similarities, can strongly benefit from each other’s expertise and solutions.

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