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The perception and teaching of national identity and national education: Case studies of Hong Kong secondary school teachers

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Abstract

Since the resumption of sovereignty by China in 1997, national identification with China has been a priority in Hong Kong SAR government's education policy agenda. Hong Kong has seen an increase of National Education programmes which aim at cultivating a Chinese national identity based on ethnic and cultural terms. This qualitative multiple-case study research attempts to explore the perceptions and teachings of national identity and National Education of 10 purposive samples of Hong Kong secondary school teachers. The findings reveal that underlying an increasing trend of Chinese national identification, there are different emphases in teachers' perceptions on national identity in terms of ethnic, geographical, cultural, legal and civic terms. Furthermore, perceptions of teaching National Education exhibited different meanings, aims, contents, pedagogies and evaluation methods. Thus, this study argues for more relevant empirical studies on the complex, integrated and multi-layered conceptualization of perceptions and meanings on national identity and National Education by teachers. This study aims at contributing to scholarly understanding about perceptions of national identity and National Education of Hong Kong within citizenship education.

Keywords: *Hong Kong secondary school teachers, national identity, National Education, perceptions, multiple-case study research, in-depth and open-ended interviews, non-participant field observations, documents analysis, multi-layered perceptions*

1. Introduction

This study explores and investigates Hong Kong secondary school teachers' perceptions of national identity and National Education after more than 10 years of resumption of sovereignty by China in 1997.

Leung & Yuen (2009) argued that changes relating to the return of sovereignty in 1997, controversial policies in matters of civic education, and emerging concerns in matters of civic education are things which seem to interest Hong Kong's civic education academics most. National identity, as Smith (1991) argued, is also complex and not as simple as one usually thinks. Topics of National identity and National Education are usually found in General Studies, Civic Education and Liberal Studies in Hong Kong, so they are important themes of learning.

Since 1997, national identification with China has been one of the top priorities in Hong Kong SAR Government's educational policy agenda (CDC, 2002). There was a priority attached by the new administration to promote National Education (Vickers, 2005),

especially since it has been perceived that after the 1st July rally of 2003 in protesting against Hong Kong SAR government, more works on National Education should be done (Vickers, 2011).

The Hong Kong SAR government's Chief Executive announced in his Policy Address 2010 that the government will invite the Curriculum Development Council, which is a government commissioned body to give advice on curriculum development, to review and develop a subject of Moral and National Education in both primary and secondary schools starting from the school year of 2013-14. There were two pages specifically written on National Education in the Policy Address 2010 (Hong Kong SAR Chief Executive, 2010). The government will also organize more Mainland China exchange programmes so that the future generations may gain a deeper understanding of China and develop a stronger sense of Chinese national identity, as well as recognizing the common origin and close ethnic and cultural bonds between China and Hong Kong.

Later on, policy refinements stated that this subject would be implemented in all primary schools starting from 2012-13 and secondary schools in 2013-14, taking up 1 to 2 periods in each week or teaching cycle. The education officials also suggested that schools could make use of Form Teaching Period or other informal learning time to implement it. In mid-2011, the Curriculum Development Council, together with Ad Hoc Committee on Moral and National Education, put forward a consultation document on this subject (CDC, 2011).

In January 2012, the news reported that this subject would be postponed to 2015 in view of the feedback obtained from the consultation in 2011, but schools are given flexibility to introduce this subject earlier. Leung and Ngai (2011) concluded that the scope of government's National Education programmes/activities is large and there are plenty of resources to support mainland exchange programmes and to produce TV and internet programmes on themes of patriotism, new images and achievements of China.

Yet, Fairbrother (2003) found from Hong Kong students' revelation that their teachers regarded topics related to China as too sensitive and not much knowledge about China is being taught. Therefore, this study sets out to explore and investigate Hong Kong teachers' perceptions on national identity and National Education in the context of controversies arising after 1997.

2. Aims and rationales of research study

This research study aims at contributing to understanding about perceptions of national identity and National Education by Hong Kong's secondary school teachers. It is an exploratory qualitative research study which intends to uncover the rich description of perceptions and meanings by a purposive sample of Hong Kong's secondary school teachers.

This study also builds on the belief that while the educational policy may say something about education, the implementation of it in school and classroom level may differ from

the intended curriculum goals, largely because of teachers' perception and meanings may exert significant influence on the actual policy implementation.

The importance of inquiring into teachers' thinking was also shown by Fullan (1989: 42). Fullan (1989) argued that among the three dimensions necessary for achieving intended outcomes in education, i.e. introducing new materials, changing teaching styles and changing beliefs, the last is the most difficult to implement for achieving intended outcomes. Changing beliefs is understood to be requiring long-lasting efforts and beliefs are also understood to exert effects of longer duration. In other words, what teachers think and believe - the meanings that their teaching and their subject has for them, endures the longest over time. Marsh (2011) also suggested that among types of curriculum reform, i.e. procedural change, technological change and re-conceptual change, the last one is the most difficult because it equates with bold reconsideration of schools, changes in the schedule, grouping of learners, personal configurations and use of physical and virtual space. In fact, there are other dimensions which can influence teachers' beliefs in teaching (Evans, 2004), such as:

- available time;
- teaching resources;
- curriculum requirements;
- teachers and students interaction;
- relevant teaching experiences; and
- the school ethos and culture

But the above is, to a large extent, not central than that of teachers' beliefs (Evans, 2004). Teaching, after all, is a largely individualized deliberation and delivering processes, which involves selecting from one's previous knowledge, understanding and experiences available to him/her. It involves applying, implementing and evaluating the chosen teaching models and strategies based on one's own teaching orientations. Other dimensions, of course, influence the selection process too, but it is unlikely that they will fundamentally alter a teacher's understanding of what is to be taught.

Thus, a common theme running across in this research study is that perception, in its most comprehensive form, is used and influenced by different kinds of knowledge and understandings, and so studies of perceptions should be undertaken within a level of integration and complexity, with findings being triangulated, rather than a simplistic idea of perceptions lead to teaching directly. The extent and quality of teachers' meanings and understandings are important to what, why and how they teach.

3. Background of study and definitions

This study is a qualitative research study on teachers' perceptions. Perceptions studies are commonly found in citizenship studies (Davies, Gregory & Riley, 1999; Evans, 2004; Lee & Fouts, 2005). Teachers, in fact, are key players when it comes to the implementation of citizenship education in schools (Lee, 2010).

This study employs multiple-case study method (Stake, 2006) with examination of schools' National Education documents, semi-structured in-depth interviews, and non-participant field observations on schools' National Education programmes/activities as triangulated methodologies.

In Hong Kong, civic education is taken to be the equivalent of citizenship education and is commonly used interchangeably. Civic education in Hong Kong usually contains elements such as rights and responsibilities, rule of law, election and voting, and freedom, etc. Its implementation is usually not as wide as that of discussions contained in citizenship education literature. It is usually informal education such as after-class learning or extra-curricular activities rather than formal education of school subjects. Although the government issued a non-mandatory curriculum guideline on civic education in junior secondary school in 1998, civic education has remained largely as extra-curricular activities in many schools. Also, despite the government put civic education as one of four Key Learning Areas in the Education Reform 2000, and as part of the Other Learning Experiences (OLE) in the New Senior Secondary education starting from 2009/10, civic education still remains peripheral.

National identity 'may be thought of as adherence to, or identification with, a corpus of national symbols' (Heidhues, 1988: 115). It is usually conceptualized, refers to the identification of a people to their ethnic, cultural, and blood lineage terms. In summing up various scholars of national identity, Jiang (2006: 147) concluded that national identity is a 'feeling that one has towards one's imagined community, the fundamental features of which include a homeland, a common myth and historical memory, and a common, mass public culture. The consciousness of national identity makes possible or helps the arising of nationalism and nationalist movements'. He and Guo (2000) defined national identity as how one identifies with the nation he belongs to. Factors may comprise a sense of belonging, a sense of security, a feeling of national pride and the felt attachment to the nation, etc. Furthermore, the sustaining of such an identity can hinge on race, common culture, equal civic rights and shared political ideology. In citizenship education, Davies, Gregory, and Riley (1999) argued that models of citizenship which look beyond the nation state seems to speak less to them than do other characterizations. Teachers usually see citizenship as something mainly in local terms.

In the local context, although the concept of 'national identity' in Chinese may not be fully equivalent to 'national identity' in English, this variance has been minimized by stressing on the national dimension, i.e. a group of people identify with each other who share common heritage and language, mass culture, memories, myths and symbols, a common legal rights and duties, as well as living in a homeland (Smith, 1991), of the concept during the data collection process. National identity is also an elusive concept. For example, Tan (1998) argued that the label 'Chinese' is complicated in the sense that the details of Chinese culture traditions differ in one way or another depending on their living places in the world, although 'Chinese' do share certain common cultural traditions. With regard to Hong Kong's education, Lee (2010) argued that with a Chinese cultural context, teachers need to adopt a transformational approach in teacher development and/or teacher strategy development that integrates a cultural orientation with the changing educational demands and expectations.

Within Hong Kong's socio-political context, national identity had been a topic left unmentioned to most Hong Kong people in the times of a British territory (i.e. before 1997) and to those people having linkages with Taiwan (Lee, 2004) because of the apolitical orientation in the society. Schools in Hong Kong also transmitted 'a common Hong Kong culture and identity and reinforced Cantonese cultural status groups through their resistance to using Putonghua as a medium of instruction' (Postiglione, 1997: 144). But this national identity issue was raised after the signing of Sino-British Joint Declaration in 1984 with a need to prepare for citizenship after the return of sovereignty in 1997. This national identity issue has puzzled Hong Kong's community since then.

Meanwhile, 'National Education' refers to a body of educational design, curriculum and teaching practices that are conceptualized and defined by Hong Kong education officials in general, and commonly adopted by Hong Kong teachers, with an aim of cultivating a belonging of Chinese national identity among the students. Leung (2011) argued that towards Hong Kong's education, National Education is about nationalism, and it aims at enhancing students' understanding about the nation, as well as enhancing their belonging to the nation and strengthening their national identity. It is usually informal learning in nature and includes knowledge, values and attitudes. Teachers, however, do not call it as patriotic education, since there is a need to differentiate Hong Kong's National Education from the patriotic education in China, which conveys indoctrinating Chinese national identity among the students.

This qualitative multiple-case study, with a pilot study conducted in early months of 2009 and main data collection conducted in 2009-2010, inquires into the perceptions on national identity and National Education of 10 research participants. Multiple-case study provides opportunity for one aspect of a problem to be studied in some depth (Bell, 2010). These purposive sampled Hong Kong secondary school civic education teachers are responsible for National Education in their schools, which belong to different school sponsor background and subsidy types. Below is a summary of the features of 10 research participant schools.

Table 1. Features of 10 research participants' schools

Teacher	Type of school	Background of school	Region	Student achievements	Pilot /Main Study
1	Direct-subsidy	Education corporation	Kowloon	Middle & Low	Both
2	Aided	Confucius, Buddhism, Taoism	New Territories	Middle & Low	Both
3	Aided	local educational charity group	New Territories	High & Middle	Both

4	Aided	Buddhist	New Territories	High & Middle	Both
5	Direct-subsidy	Education corporation	Kowloon	Mixed	Both
6	Aided	Education corporation	Hong Kong Island	High & Middle	Both
7	Government	Government	New Territories	High & Middle	Main only
8	Direct Subsidy	'Pro-Beijing government'	Hong Kong Island	Mixed	Main only
9	Direct Subsidy	'Pro-Beijing government'	Kowloon	Mixed	Main only
10	Government	Government	Kowloon	Middle & Low	Main only

These 10 research participants have rich and informed teaching experiences. They are purposively sampled based on the researcher's previous understanding about their expertise.

The research methodologies are:

1. examination of 10 research participant schools' National Education documents (i.e. school year plans and activity plans on National Education);
2. in-depth, semi-structured and open-ended interviews on these 10 research participants; and
3. non-participant field observations on their National Education programmes/activities.

The findings from different methodologies are intended to triangulate with each other and give a thick, dense and overarching description of their perceptions on national identity and National Education.

4. Research questions

The research questions were developed based on the experiences learnt from the pilot study, as well as from reading relevant literature as indication of what would be puzzling or problematic (Stake, 1995). The followings are research questions:

Part I. Perceptions and Development of National identity

- a. How do Hong Kong secondary school teachers perceive the meanings of national identity?
- b. Based on their memories, how did they perceive their national identity before the Chinese resumption of sovereignty over Hong Kong in 1997?
- c. How do they perceive their national identity now?
- d. Based on their memories, how did their perceptions on their national identity develop since 1997?
- e. What are the significant personal, political or social events informing their national identity development since 1997?

Part II. Perceptions on Teaching of National Education

- f. What are their understandings and meanings of National Education?
- g. What do they think about National Education's aims and content should be?
- h. How do they think National Education should be taught with regard to pedagogies and the evaluation methods?

Efforts have been spent on ensuring that the above research questions were comprehensive by referring to appropriate literature. Through the pilot study which used a similar set of questions, the researcher was able to test the validity of the interview questions and make substantial improvements. Making references to questions adopted by some studies on national identities (Wong, 1997) and National Education (Leung, 2004, 2008) also help to design and structure the interview questions in the main study.

5. Limitation of this study

First, there are various forms of identities such as self (Vickers, 2005), ethnic, religious, cultural (Smith, 1991; Cogan & Derricott, 1998), familial, local, tribal, social (Heater, 2004), regional (Jackson, Gibb & White, 2006), European (Steiner, 1996), global (Dower & Williams, 2002; Clough & Holden, 1996), and gender (González & Seidler, 2008) identities. These reflect the complexities of the concept of identity. However, they are not the research focus of this study.

Second, although this study addresses perceptions of national identity and National Education, it does not intend to uncover any cause and effect relation within each sample teacher. There is no assumption of either one would cause the other one, given the complexities of human perception and actions which may require longitudinal studies to ascertain any relations between them.

This study also does not claim any representativeness. It only explores the perceptions of the sample teachers. At most, the present study offers a collection of situated case perceptions in a binding of larger research questions, and it abstains from formal projection to cases that are not examined. Although the findings from the individual cases and the commonalities across the cases are weak representations of the complete population concerned, these findings can be useful for understanding the population and unstudied individual cases (Flyvbjerg, 2001).

6. Developments of research design – pilot study and main study

Research idea and considerations

A rough idea of conducting this research study about perceptions and meanings of national identity and National Education emerged when I started teaching civic education courses in a university-level institution in Hong Kong. It is common to teach concepts and topics about identity, identification, nation, national identity, and National Education in civic education. However, national identity issue just came up in my mind.

A clear research idea emerged after conducting initial literature review with an aim of developing the aims of a pilot study, setting the research questions, working out the research design, and locating the research participants and designing the in-depth interview schedule. The literature review involved careful consideration of different types of literature, which come from academic materials (through keyword searches related to the topic of this study), curriculum or programme guidelines from government and non-governmental organizations, as well as school-based National Education documents.

The type of research methodology in both pilot and main study fall into the category of qualitative research in education. The researcher acknowledges that qualitative research just suits the type and needs of the research study here. Qualitative research is a field of inquiry with applicability crosscuts disciplines. In its own development, there are many methods and approaches that fall within qualitative research, such as interviewing, participant observation, and visual methods (Denzin & Lincoln, 1994). For the study here, interview techniques help to explore teachings' perception, while non-participant observations tells what they do.

Adopting multiple-case study research

This multiple-case study, which intends that people can learn much that is general across cases (Stake, 2006), is an exploratory work (Hakim, 2000) on teachers' perceptions. The multiple-case study method illustrates each case in richer depth and highlight cross-cases issues (Stake, 1995; 2006). Since scholarly studies about perception are primarily qualitative in nature, and the realities are complex and interconnected, case study just suits to obtain the descriptions and interpretation of each other (Stake, 1995). At the basic level, case study provides descriptive accounts of one or more cases, which is a richly detailed 'portrait' of a particular social phenomenon (Hakim, 2000).

As for generalization, the researcher here adopts the view that case study does not necessary lead to generalization, but rather to rich and intensive description of perceptions among multiple cases. Bassey (1999:12) argued that 'there were very few generalizations (in this absolute sense) about education – and even fewer, if any, that were useful to experienced teachers.' Furthermore, as Bassey (1981: 85) argues that 'an

important criteria for judging the merit of a case study is the extent to which the details are sufficient and appropriate for a teacher working in a similar situation to relate his decision making to that described in the case study. The relatability of a case study is more important than its generalizability.' Therefore, what should be judged is how the case study can relate to reader's educational or related situations (Bell, 2010).

The fieldwork for any case study research may include any type of evidence that is relevant and available (Hakim, 2000). In this study, analyses of school-based National Education documents, in-depth interviews and non-participant observation were adopted to collect data about teachers' perceptions. As Stake (1995) argued, qualitative researchers take pride in discovering and portraying the multiple views of a case.

A pilot study and the learning from it

A pilot study allows the researcher to reduce the possibility and certainty of error (Babbie, 2010), as well as addressing the concerns of case study having the problems of selective reporting and the resulting dangers of distortion (Bell, 2010).

The topic of the pilot study was about perceptions of Hong Kong secondary school teachers on their national identity and National Education with in-depth interview as the main data collection method.

As for the selection of sample, as Babbie (2010) argued, it is not essential that any pretest subjects comprise a representative sample, but at least one should use people for whom the questionnaire is relevant. Also, as Hakim (2000) argued, some degree of prior knowledge maybe necessary for suitable cases to be selected, especially if focused sampling is used. Furthermore, it is the quality and richness of the qualitative data obtained that is important, rather than the size of sample (Patton, 1990). All these considerations have ensured the validity of selecting six research participants in the pilot study.

After the pilot study, the pilot study's informants were invited to comment on the clarity, relevance, and the appropriateness of the interview questions. The researcher also checked whether the way of framing questions could solicit what are intended to ask, thus the validity of whether an item or instrument measures or describes what it is supposed to measure or describe (Bell, 2010).

The subsequent analysis of the pilot study findings was conducted in summer 2009. Their comments helped me to revise the drafting of interview questions. The findings also alerted me that, first, there should be a clearer focus of the research study. Second, the pilot study pointed to the need of using multiple data collection methods for triangulation purposes. Third, there was a need to improve my interview tactics and techniques in order to prompt the research participants to elaborate. Fourth, the purposive sampling choices should be expanded.

The main research study

The main research study was started in late 2009 and completed in late 2010. It adopted a qualitative orientation and multiple-case study research method (Stake, 2006; Naumes & Naumes, 2006) to yield qualitative findings on Hong Kong teachers' perceptions and meanings of national identity and National Education. This multiple-case study research is also subjective and interpretive which explores perceptions of the teachers. The research participants were chosen because they were significant or 'special' case for this study (Yin, 2009).

The key to an adequate sample size is to generate enough in-depth material that patterns, concepts, categories and understandings emerge from the data (Auberbach & Silverstein, 2003), rather than the sheer size of sample. It is the quality and richness of data that matters in case study research. The cases selected are similar in that they have got typical and substantive National Education in their schools. The research participants were all experienced teachers responsible for Civic Education or National Education. After explaining the study aims, they were invited to participate in the main study with informed consent.

With such design of purposive sample of research design, 10 research participant teachers have their schools' National Education documents examined and analyzed, interviewed twice by in-depth interviews, and their school-based National Education programmes/activities observed twice. All these provided triangulated data to answer the research questions.

7. Findings & Discussions

The major findings illustrate the different emphases of perceptions of national identity by 10 research participants, and the different meanings given on National Education in regard to aims, contents, teaching pedagogies and evaluation methods.

This study found that teachers have got diversified perceptions of national identity and meanings of National Education, despite the official education policy calls for a unified conception of Chinese national identity based on ethnic and cultural terms, and a patriotic favour of National Education. These diversified perceptions may have significant implications to the implementation and success of National Education.

The findings also reveal that under the official proclamation of a 'Chinese national identity', some teachers perceive their national identity as 'Chinese from Hong Kong' and some teachers have long been seeing themselves as 'Chinese', while others reported an increasing trend of identification with a Chinese national identity, mostly because of their teaching duties of National Education or the rising image and status, and economic development of China in recent decade. This may have implications for understanding the wider picture of how Hong Kong people perceive their national identity after 1997.

The personal, social, and political events have also exerted significant impacts on their perceptions of national identity, although these events are complicated and they are interwoven to a certain extent. The research participants mentioned personal connections

with relatives in China, political campaigns and mobilizations in 1960s, the June 4th incident in 1989, economic developments in China, achievements in sports and aerospace technology, poisonous milk incident, politics and political system of China, human rights controversies, and personal reading and reflection, etc.

The research participants have got diversified perceptions on the meanings of National Education, as well as the aims, contents, teaching strategies and evaluation methods on it. While many of them emphasized on teaching the Chinese national flag and anthem in National Education, others define it in terms of having knowledge and understanding developments of China, belonging and identification, concerns about Chinese livelihood, Hong Kong as part of China, and understanding rights and responsibilities as a Chinese citizen. There are diversified perceptions on meanings of National Education.

As for the aims of National Education, there are categories such as learning about Chinese national flag and national anthem, understanding knowledge about China, learning about Chinese politics and political system, fostering a Chinese national identification, making efforts and contributions to the nation, cultivating oneself, developing analytical and critical thinking skills, love of China and Chinese people, and behavioural expectations on students.

The categories found for pedagogies of National Education include balanced approach, seeing goodness from worse cases, immersion/experiential learning, critical thinking approach and reflective teaching. Meanwhile, in assessing learning outcomes of National Education, a few of them mentioned assessing their knowledge about China, while others mentioned using different assessment methods.

8. Conclusion

With such a multiplicity of perceptions on defining 'National Education', this also agrees with recent educational theorists and policy-makers who increasingly favour citizenship education that promote active and reflective forms of citizenship (Kymlicka, 2008), while they increasingly reject aim of citizenship education as an unreflective patriotism, one that glorifies the past history and current political system of the country and vilifies opponents of that political system, whether they are internal dissidents or external enemies (Nelson, 1980). In relation to the calls for promoting active and reflective forms (Schon, 1983) of citizenship, the researcher argue for active, informed, participatory methods in teaching National Education, and ideas of 'global citizen' may just well expand the concept of identity in 'National Education'.

While some research participants emphasize on developing the knowledge orientation of their students, others emphasize on fostering patriotic feelings and attitudes towards China. These were triangulated by the findings in document analysis, field observation and in-depth interviews. The knowledge orientation matches the scholarly findings on the general teaching orientations in Hong Kong's classroom (Biggs, 1995).

The implications of such complexities of National Education in Hong Kong could be seen in the wider debates between patriotic and critical thinking oriented National

Education. After all, as Lee (2010) argued, what to teach in citizenship curriculum is equally contentious as what citizenship is. While the patriotic National Education has been promoted by the pro-Beijing government political parties, voluntary associations, and some pro-Beijing government's secondary schools, the critical thinking oriented National Education has been adopted by some secondary schools and non-governmental organizations for the purpose of cultivating future critical patriots. While the former emphasizes on the patriotic needs of cultivating Hong Kong people into a Chinese after 1997, the latter usually criticized the former approach as 'brainwashing'. This debate has caused many controversies.

On the other hand, some policy implications could be developed based on the findings of this study. If the meanings of National Education are important to the implementation of National Education in the school sector, but the perceptions of national identity and National Education differ among teachers, can we expect the teachers to commit themselves to a policy that they are not fully agreed upon or have divergent views on it? If the government wants a smooth implementation of National Education, what perceptual differences must be taken into consideration? What would be the professional advice and teaching supports that can be offered to facilitate the teaching of national identity, and possibly, students' understanding in National Education?

In conclusion, the research participants have got different emphases on national identity. They also differ on their perceptions of aims, contents, teaching methods and evaluation methods of National Education. The findings revealed a far more complex and complicated picture than one may originally think of it. The researcher calls for deeper, multi-layered and integrated understanding about teachers' perceptions on national identity and National Education, which possibly addresses the linkages and interactions between local, national and global levels. A policy mindset of taking into account of differential understandings on national identity is also recommended.

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