

# Lifelong Learning in Hong Kong

## Status Report

**Will Douglas and Bob Adamson**

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## Abbreviations

AD	Associate Degree
CAS	Civil Aid Service
CDC	Curriculum Development Council
CEF	Continuing Education Fund
CIC	Construction Industry Council
CILTHK	Chartered Institute of Logistics and Transport in Hong Kong
CME	Continuing Medical Education
COTAP	Committee on Professional Development of Teachers and Principals
CPD	Continued Professional Development
CPT	Continuous Professional Training
CSD	Correctional Services Department
CSPE	Committee on Self-financing Post-secondary Education
DYJ	Diploma Yi Jin
EA	Elder Academy
EC	Education Commission

ECF	Enhanced Competency Framework
EDB	Education Bureau
ENLS	Extended Non-Means-Tested Loan Scheme
ERB	Employees Retraining Board
FASP	Financial Assistance Scheme for Post-secondary Students
FSTE	Federation for Self-financing Tertiary Education
GFS	Government Flying Service
HAB	Home Affairs Bureau
HATA	Hong Kong Association of Travel Agents
HKADC	Hong Kong Arts Development Council
HKAPF	Hong Kong Auxiliary Police Force
HKAS	Hong Kong Accreditation Service
HKCAAVQ	Hong Kong Council for Accreditation of Academic and Vocational Qualifications
HKCAS	Hong Kong Certification Body Accreditation Scheme
HKDSE	Hong Kong Diploma of Secondary Education
HKEAA	Hong Kong Examinations and Assessment Authority
HKHA	The Hong Kong Hotels Association
HKIAS	Hong Kong Inspection Body Accreditation Scheme
HKIB	Hong Kong Institute of Bankers
HKIC	Hong Kong Institute of Construction
HKMA	Hong Kong Management Association
HKMAAC	Hong Kong Mediation and Arbitration Centre
HKPFS	Hong Kong PhD Fellowship Scheme
HKU SPACE	Hong Kong University School of Professional and Continuing Education
HOKLAS	Hong Kong Laboratory Accreditation Scheme
IFPHK	Institute of Financial Planners of Hong Kong
LCSD	Leisure and Cultural Services Department
LegCo	Legislative Council
NGO	Non-government Organization
NLSFT	Non-Means-Tested Loan Scheme for Full-time Tertiary Students
NLSPS	Non-means-tested Loan Scheme for Post-secondary Students
NMTSS	Non-means-tested Subsidy Scheme for Self-financing Undergraduate Studies in Hong Kong
PWMA	Private Wealth Management Association

QEF	Quality Education Fund
QEFSC	Quality Education Fund Steering Committee
QF	Qualifications Framework
R&D	Research and Development
RGC	Research Grants Council
RPg	Research Postgraduate
SCOLAR	Standing Committee on Language Education and Research
SCS	Specification of Competency Standards
SSSDP	Study Subsidy Scheme for Designated Professions/Sectors
SFC	Securities and Futures Commission
SFO	Student Finance Office
SWD	Social Welfare Department
TIC	Travel Industry Council
TSFS	Tertiary Student Finance Scheme
UGC	University Grants Committee
UIL	UNESCO Institute for Lifelong Learning
VPET	Vocational and Professional Education and Training
VTC	Vocational Training Council
WEC	Workplace English Campaign
WFSFAA	Working Family and Student Financial Assistance Agency
WOPS	Work and Orientation Placement Scheme



# 1 Context

## 1.1 Background

Lifelong learning is the idea that education extends beyond the boundaries of the formal system of schools and tertiary institutions and has no age limits. There is no single definition and the UNESCO-UNEVOC TVETipedia provides nine definitions from different organizations. The UNESCO definition from 1984 is:

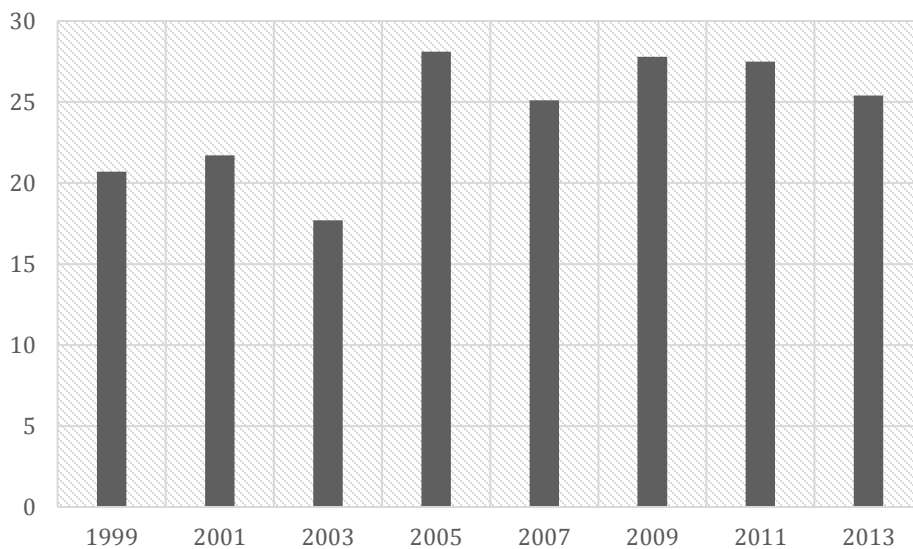
*Lifelong learning is:  
"All learning activity undertaken throughout life, with the aim of  
improving knowledge, skills and/or qualifications for personal, social  
and/or professional reasons".*

Source: <https://unevoc.unesco.org/go.php?q=TVETipedia+Glossary+A-Z&id=317>

For the purposes of this Hong Kong report, lifelong learning comprises any learning after compulsory primary and secondary schooling. The information provided was sourced online from publicly available websites or was obtained through personal communications.

Figure 1 shows the percentage of the population of working age engaged in continuing education in Hong Kong.

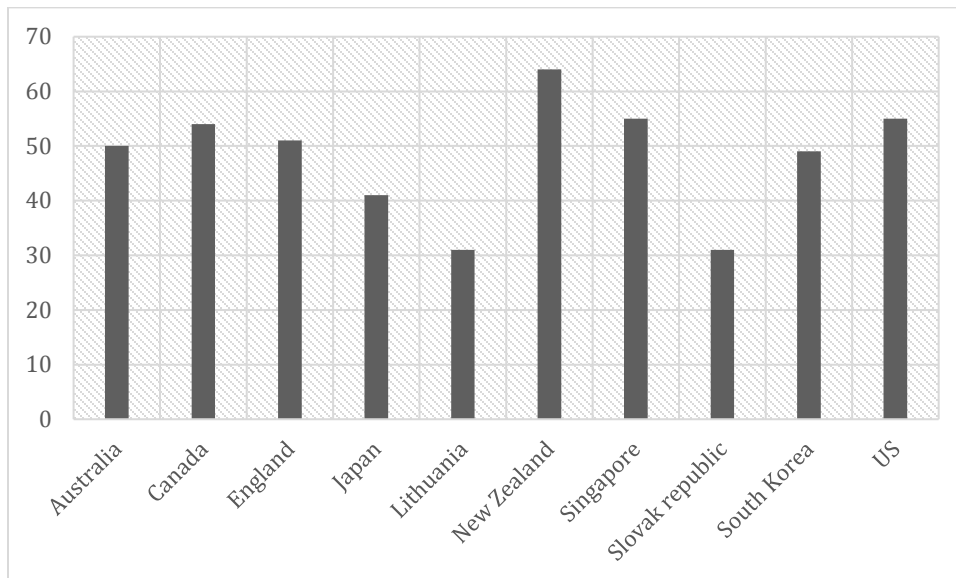
**Figure 1 Continuing Education Participation Rate (Percentage of People Aged 18-64)**



Source: HKU Space, 2016 survey

For comparison, Figure 2 shows the percentages for other countries.

Figure 2 Continuing Education Participation Rate in 2015 in Other Countries (Percentage of People Aged 18-64)



Source: OECD 2016 survey

The reasons for the relatively low levels of continuing education in Hong Kong are not known, but the LegCo Education Panel (2017) suggested this could be due to the low level of the Continuing Education Fund. This would also suggest that self-funded continuing education attracts fewer people than other funding models. It could also be a result of low unemployment where there is less need to retrain for alternative employment.

The UNESCO Institute for Lifelong Learning (UIL) considers three categories in its Global Reports on Adult Learning and Education (GRALE):

*Employment and the labour market:*

*"Education boosts skills, and people with more skills are more employable. This statement holds true both in theory and in practice. Solid evidence from around the world shows that, as well as enabling people to develop new skills, education and learning lead to higher wages, promote job satisfaction and encourage employees to be more committed at work. As a result, they raise productivity and boost economic growth".*

*Health and well-being:*

*"The basic link between health and education is well-established: more educated individuals are more likely to know how to take care of their health, and so more educated societies are likely to have healthier populations".*

## *Social, civic and community life*

*"[Adult learning and education] ALE yields benefits to individual citizens, their families and the communities they live in. ALE helps citizens become more active in civil society and political life, more tolerant of diversity and more aware of environmental issues. It also promotes cultural development, from the arts to spirituality, helping citizens become well-rounded and resourceful in shaping their societies".*

Source: 3rd Global Report on Adult Learning and Education, UIL

### **1.2 The Hong Kong Interpretation of the UIL Categories**

In the Hong Kong context, employment driven education/training leads to qualifications within the qualifications framework (QF) accredited through the Hong Kong Council for Accreditation of Academic and Vocational Qualifications (HKCAAVQ); education/training leading to non-accredited (but may be internationally recognized) qualifications (e.g. non-accredited courses or distance learning from an overseas institute); and continued professional development/training through professional institutes and other industry bodies.

Provision of primary and secondary education is universal and as a developed territory, Hong Kong provides education, health care and social services to its citizens. In the health and well-being context, lifelong learning as a means of providing basic health care support is not as critical as in developing countries or those with rural populations. In the local context, the category of health and well-being includes learning for personal fulfilment, learning to keep an active and healthy mind and learning as a recreational activity.

Lifelong learning and education for social, civic and community life in the Hong Kong context can help develop a sense of active civic responsibility, an awareness of environmental responsibility and the importance of diversity. Learning takes the form of public information and volunteer work for non-governmental organisations (e.g. Hong Kong St. John Ambulance) or government auxiliary services (e.g. Civil Aid Service or the Auxiliary Police Force). There are many charitable organizations that have volunteer community programmes.

### **1.3 Demographics**

The population of Hong Kong is 7,409,000 and of these 3,397,000 are male and 4,012,000 are female (end of 2017, Census and Statistics Dept.). The median age is 43.4 compared to 39.6 in 2006 and 41.7 in 2011.

The proportion of the population aged 65 or over increased from 8% in 1966 to 12% in 2006 and currently stands at 16%. According to "Hong Kong Population Projections 2015-2064", the number of elderly people, those aged 65 or older, in Hong Kong will constitute around 35.9 per cent of the population. Currently, the average lifespan is 87.32 for women and 81.24 for men. The number of under-14s

shrank from 14% in 2006 to 11%. The biggest age group – 15 to 64 – dropped over the decade from 74% of the population to 73%.

*"The population pyramid is no longer a pyramid but taking more of the shape of a flowerpot or rugby ball..."*

*.....What worries me is that ... most people now are aged 50 to 59. Most people will be 60 to 69 in 10 years, 70 to 79 in another 10 and then 80 to 89."*

*Commissioner for Census and Statistics, 2017*

The percentage of unmarried residents in the corresponding decade increased from 24.9% to 28.5% for men and from 19.9% to 22.5% for women.

As fertility rates dropped, the size of the average domestic household shrank from 3.0 in 2006 to 2.8 in 2016. The gender ratio has also become skewed with just 852 males per 1,000 females, compared with 911 to 1,000 a decade ago.

The non-Chinese population grew from 5% to 8%, largely because of Filipinos and Indonesians coming to Hong Kong to work as domestic helpers.

Median monthly income increased from HK\$10,000 to HK\$15,000 in the last decade. The ratio of median rent to income for private housing grew from 25.2 per cent in 2006 to 30.7, while that of public rental housing stayed level.

#### **1.4 Education Trends**

The government provides twelve years of free primary and secondary education for all Hong Kong's children. Nine years of education are compulsory. The system was reformed in 2009 to introduce the Hong Kong Diploma of Secondary Education (HKDSE). This resulted in 3 years of lower secondary and 3 years of senior secondary education being completed after S6 (students aged 17-18) and tertiary education commencing one year earlier (known as 3:3:4). Many undergraduate programmes were increased by one year to account for the younger intake.

In addition to government/aided/DSS schools offering the HKDSE there are 37 International Secondary Schools (fee-paying) offering a range of international curricula including the International Baccalaureate.

The school non-attendance rate, as defined as children aged 6 to 15 who leave school education without completing Secondary 3, was 0.34% in 2015 ([www.socialindicators.org.hk](http://www.socialindicators.org.hk)). For comparison purposes, the UNESCO Institute of Statistics reported, "In 2016, 263 million children, adolescents and youth were out of school, representing nearly 20% of the global population of this age group" (Fact Sheet No. 48, February 2018, UIS/FS/2018/ED/48). The figure for out-of-

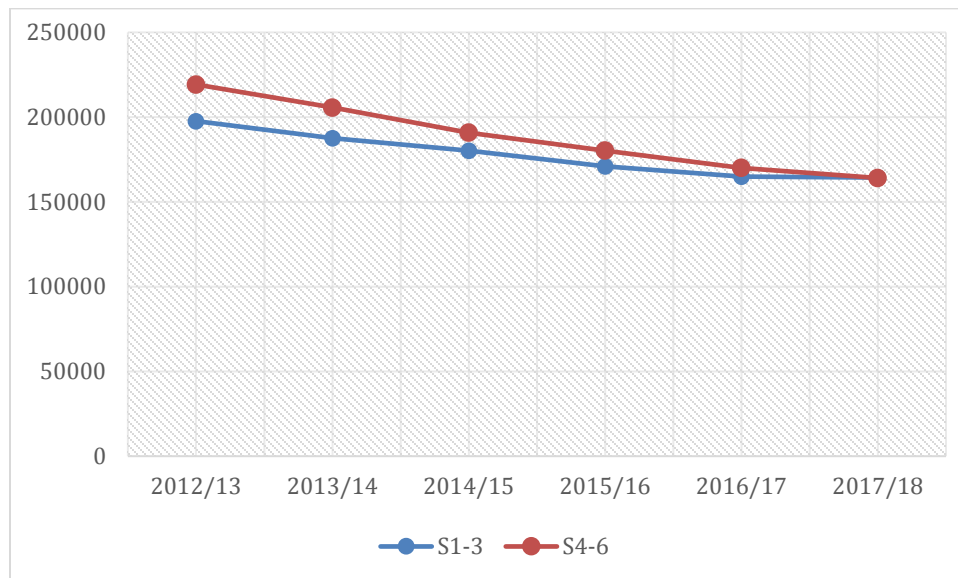
school children of lower secondary age in Europe and North America is 2.1%. This would indicate that Hong Kong is successful in providing universal education with dropout cases being very exceptional. There are various reasons for dropout such as learning difficulties and social issues. For ethnic minorities, language difficulties and lack of school support can lead to drop out or even de-registration (expulsion) (Bhowmik, Kennedy, Hue 2018). The issue of non-attendance is left largely with the family and school to handle. The Education Bureau (EDB) will occasionally issue "Attendance Orders" but these are rare.

Home-schooling is permitted. Accurate data are hard to find but in 2015 there were 33 families registered with EDB and The Homeschool Meetup Group had around 119 families. The website indicated a membership of 152 in 2018.

Source: <http://www.homeschool.hk/#/homeSchoolInHK>  
and [https://www.meetup.com/hongkong-homeschool/?\\_cookie-check=1AuAOrZA2hD16TuF](https://www.meetup.com/hongkong-homeschool/?_cookie-check=1AuAOrZA2hD16TuF)

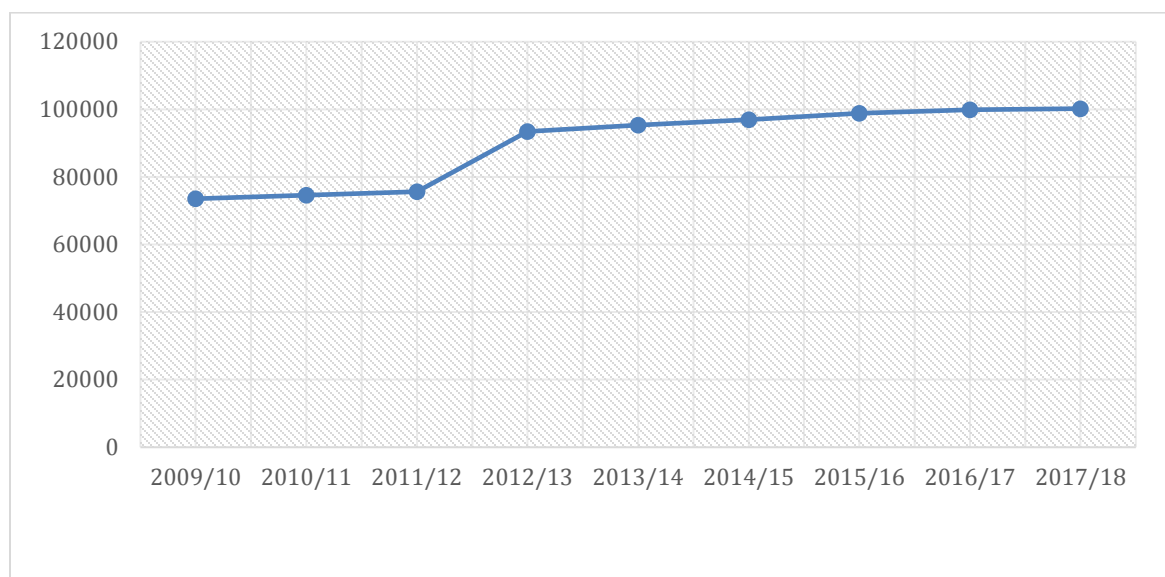
The number of secondary school students fell by 21% between 2012/13 and 2017/18 academic years. This trend is shown in Figure 3.

Figure 3 Trend in Numbers of Secondary School Students 2012-18



The number of students enrolled in University Grants Committee (UGC) tertiary institutes increased by 25% between 2009/10 and 2017/18 academic years. However, there was an increase of ~20,000 students in academic year 2012/13 as universities took a "double cohort". This was because the final cohort of students taking "A" levels overlapped with students arriving one year earlier at universities having completed the Hong Kong Diploma of Secondary Education (HKDSE). Most degree courses were increased by one year so the capacities of the UGC-funded universities were permanently increased to ~100,000 students.

Figure 4 Trend in Numbers of UGC University Students 2009-18



Numbers of students undertaking vocational and professional education and training through the Vocational Training Council (VTC) (2016/2017) are provided in Table 1.

Table 1 Students Training at VTC Institutes (2016/17)

VTC institution	Full Time Students	In-service Students
Technological and Higher Education Institute of Hong Kong (THEi)	2,780	320
Institute of Professional Education and Knowledge (PEAK)		88,290
School for Higher and Professional Education (SHAPE)	2,230	2,300
Hong Kong Institute of Vocational Education (IVE), Hong Kong Design Institute (HKDI), School of Business and Information Systems	33,850	97,590
Hotel and Tourism Institute (HTI)	930	2,650
Chinese Culinary Institute (CCI)	280	1,140
International Culinary Institute (ICI)	1,600	1,180
Maritime Services Training Institute (MSTI)	100	4,700

Youth College	9,760	7,740
Pro-Act by VTC		1,140
Integrated Vocational Development Centre (IVDC)	4,200	3,580
Shine Skills Centre	630	380
<b>Total</b>	<b>56,380</b>	<b>221,590</b>

Source: VTC Report 2016/17

It can be seen that the VTC has over half the number of full time students as those attending the UGC-funded universities combined and over 200,000 in-service part-time students.

Unfortunately it is not possible to provide a full picture of how many people are undertaking formal lifelong learning as the majority of vocational education providers (other than VTC ) will not disclose their student numbers.

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Reference: Miron Kumar Bhowmik, Kerry J. Kennedy & Ming-Tak Hue (2018) Education for all – but not Hong Kong’s ethnic minority students, *Race Ethnicity and Education*, 21:5, 661-679, DOI: 10.1080/13613324.2017.1294573

## 1.5 Employment Trends

The nature of employment has changed over the last two or three decades with manufacturing moving away from Hong Kong. The number of managers, administrators, professionals and associate professionals has increased as the work force has moved towards services-oriented economy. There has been a decline in the proportion of working population engaged as clerical support workers, plant and machine operators and assemblers. This illustrates the importance of lifelong learning to adapt to a rapidly changing employment market.

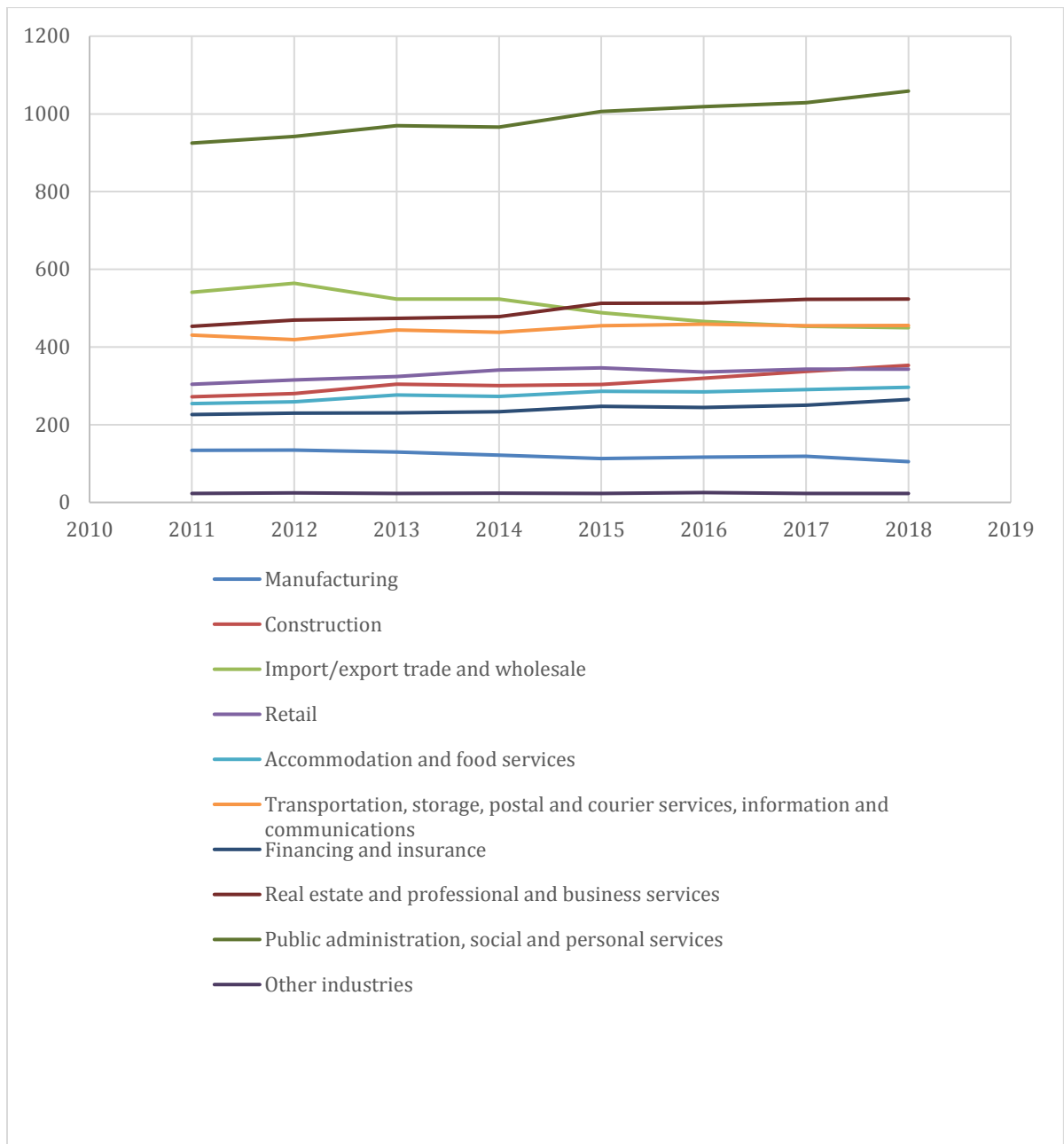
Source: LegCo Research Brief Issue No. 1, 2017 – 2018

*"it is likely that there will be less routine jobs in the future as they can be automated across many occupations and industries. Technological change should also shorten the shelf-life of an employee's existing skill sets. These in turn require workers to continually enhance and develop their technical and soft skills to cope with the shift in skills requirements in the new age of automation"*

*LegCo Research Brief Issue No. 1, 2017 – 2018*

Figure 5 shows the changes in employment areas between 2011 and 2018.

Figure 5 Employment Areas between 2011 and 2018.

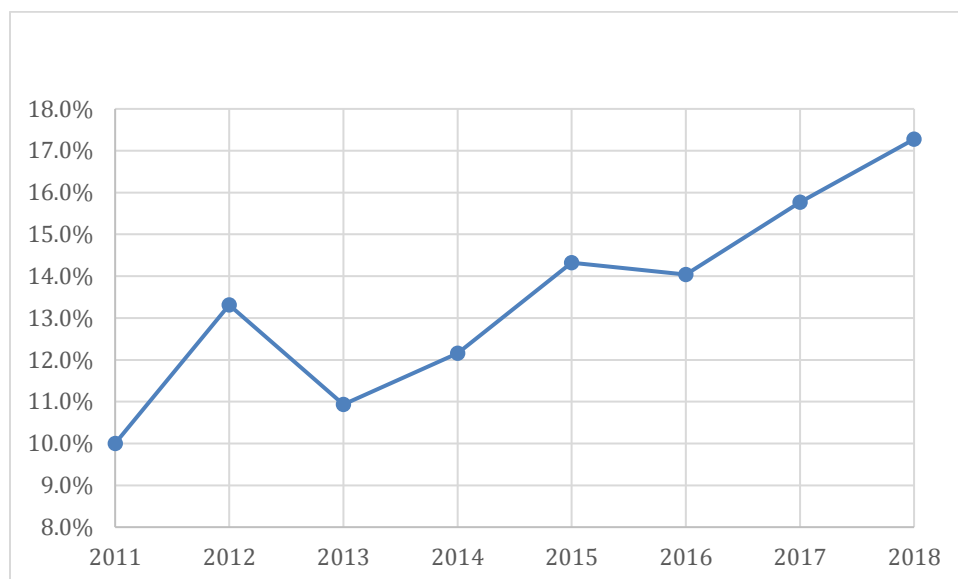


Source: Census and Statistics Department, HK Government

Figure 6 shows that between 2011 and 2018 the difference between the number of professional jobs compared to manual jobs grew by 7%. This supports the statement by LegCo that "the number of managers, administrators, professionals and associate professionals has increased".



Figure 6 Difference between Numbers of Professional and Manual Jobs between 2011 and 2018



## 2 Policy

### 2.1 Current Policy

According to the EDB website, currently policy objectives for post-secondary education are to:

- provide multiple and flexible articulation pathways for young people to pursue post-secondary education (currently about 70% of the relevant age cohort have access to post-secondary education, including 45% who have access to degree education);
- further develop Hong Kong as a regional education hub;
- support the development of the eight universities funded by the UGC through the provision of publicly-funded study places at various levels (including 15,000 first-year first-degree places and 5,000 senior year undergraduate intake places per annum by the 2018/19 academic year), as well as the provision of research grants and capital grants;
- support the development of the self-financing post-secondary sector and promote the diversification of post-secondary education through various support schemes such as the Land Grant Scheme and Start-up Loan Scheme;

- ensure that no qualified students are denied access to higher and post-secondary education due to a lack of financial means;
- make available to working adults further opportunities for higher education through the Open University of Hong Kong;
- assure the quality of post-secondary education and ensure its relevance to the needs and development of the community; and
- ensure that courses leading to non-local higher academic and professional qualifications are conducted by recognised institutions and professional bodies and have attained comparable standards and recognition as similar courses in the home countries concerned.

Source: <https://www.edb.gov.hk/en/edu-system/postsecondary/policy-objectives/index.html>

## 2.2 Development of Policy on Lifelong Learning Following Handover in 1997

In early 1999, the Education Commission (EC) (a non-statutory body that advises Government on the development of education) indicated that it would carry out a comprehensive review of the Hong Kong education system at the request of the Chief Executive. This review was said to be needed because of economic, political, social and cultural developments and the impact of information technology on education, as well as the relationship with mainland China.

Lifelong learning was to be the cornerstone of the new education reform, central to its vision, aims and direction. In 2000 the EC advised that lifelong learning was not only essential to Hong Kong but it was also gradually “becoming our way of life”. Lifelong learning is also embedded as one of the educational objectives or outcomes in the reform of the new primary and secondary curricula where pupils are expected to acquire the skills and capacities for becoming a lifelong learner.

In 2000 only around 18% of school leavers attended university (largely government funded). The Chief Executive announced a different form for post-form five secondary education: *“the government will facilitate tertiary institutions, private enterprises and other organizations to provide options other than the traditional sixth form education, such as professional diploma courses and sub-degree courses.... We need to build a flexible higher education system that offers various channels and different modes of learning, so that everyone can pursue continuous learning at different stages of life”*.

Source: Education Commission (2000) - Excel and Grow. Review of Education System: Reform Proposal (Consultation Document), Hong Kong Government Printer

In 2000 the plan to enable 60% of school leavers to receive a post-secondary education by 2010 required finding 28,000 more post-secondary educational places. The process began with Hong Kong University offering Associate Degree (AD) programmes through its continuing education body, Hong Kong University School of Professional and Continuing Education (HKU SPACE). These AD courses, offered on flexible terms, were very popular and were initially oversubscribed. By 2004 there were 12,000 additional post-secondary places available through 18 providers, with most places provided by the UGC-funded tertiary institutes. The government made it clear that lifelong learning had to be self-funded i.e. no direct grants as provided to the UGC-funded institutes with an emphasis on the user pays principle. The government provided start up loans for non-profit educational institutions, provided sites for facilities and provided some financial assistance to learners (see later section on funding).

In the early 2000s City University of Hong Kong and Hong Kong Polytechnic University offered sub-degree programmes that were subsidized by over \$1.2 billion per year. LegCo discussed the withdrawal of government support and from 2004–08 the government withdrew 70% of public funding from these programmes so they could be replaced by self-funded courses.

The economic downturn that began in 1997 resulted in increasing youth unemployment (38% in May 2003). Project Springboard (later the Yi Jin Diploma) and other schemes such as the Youth Pre-Employment Training programme were initiated to provide training for school leavers with little or no qualifications. These were subsidized by government. This situation had the effect of making government recognize the importance of lifelong learning as means of retraining and reducing unemployment.

Source: Peter Kennedy (2004) The politics of 'lifelong learning' in post-1997 Hong Kong, *International Journal of Lifelong Education*, 23:6, 589-624, DOI:10.1080/026037042000311497

In 2005 the annual policy address of the Chief Executive asserted that in the face of globalization, Hong Kong must become an innovative knowledge-based economy and through "training and retraining programmes, the government helps citizens adjust to the demands of economic restructuring".

Source: Tung, C. H. (2003) Capitalizing on our Advantages, revitalising our economy. Address by the Chief Executive at the legislative council on 8th January 2003, Hong Kong: Hong Kong Government Printer.

Moving to policy in more recent years, the 2013 Chief Executive's Policy Address stated "All-round education and lifelong learning is the overall goal of education in Hong Kong".

### **2.3 Policy Support for Lifelong Learning – 2013**

There were no discussions or financial commitments in relation to lifelong learning reported in the 2013 Policy Address.

## **2.4 Policy Support for Lifelong Learning – 2014**

The LegCo Education Panel supported the proposal of the VTC to enhance its information technology infrastructure and services at a cost of \$67 million. However, there was reservation over the proposal to seek funding of \$19.48 million to conduct a longitudinal study on HKDSE graduates who decided to pursue vocational education and training programmes at the VTC.

## **2.5 Policy Support for Lifelong Learning – 2015**

Education Panel members stressed the need to promote vocational education as an option for secondary school leavers. The Administration advised that the Qualifications Framework launched in 2008 supported different qualifications for the provision of career and vocation related education at senior secondary level through the Applied Learning courses and Other Learning Experiences, the provision of vocational education and training by statutory bodies including VTC.

New initiatives such as the Pilot Training and Support Scheme, as well as the establishment of the Task Force on Promotion of Vocation Education were implemented. Concern was raised about opportunities for students with special educational needs.

## **2.6 Policy Support for Lifelong Learning - 2016**

As reported in the 2016 LegCo Education Panel Report, EDB was requested to take steps to “encourage greater participation by the business sector in providing placement and practical training opportunities for students.” Panel members supported the recommendation of the Task Force on Promotion of Vocational Education to rebrand vocational education and training in Hong Kong as vocational and professional education and training (VPET). The Panel would continue to monitor the future implementation of VPET. A delegation of the Panel visited Germany and Switzerland in September 2015 to study the dual-track vocational education and training systems in these two countries. The Panel supported implementation of a pilot scheme at a non-recurrent expenditure of \$200 million to subsidize students admitted to designated professional part-time programmes offered by the VTC for submission to Finance Committee.

## **2.7 Policy Support for Lifelong Learning - 2017**

The 2017 LegCo Education Panel Report gave a commitment to review:

- promoting VPET to cater for students’ diverse abilities and interests, and fostering closer business-school collaboration to meet the manpower needs of Hong Kong; and
- revisiting the role and positioning of self-financing post-secondary institutions.

With reference to lifelong learning in the context of continued professional development, the panel recommended providing a non-recurrent funding of \$500 million to support suitable projects to implement various measures for enhancing the professional development of teachers and principals over the next 10 years.

Government support for the Qualifications Framework (QF) - the QF Fund - supports stakeholders' participation in the QF and enhances the promotion and public education of the QF, with a view to promoting lifelong learning and meeting the manpower needs of Hong Kong. There are currently about 8,000 QF-recognized academic and vocational qualifications. EDB conducted comparability studies of QFs with the European Commission, New Zealand, Scotland and Ireland to gain a better understanding of other QFs. There was not a good public understanding of QF so government recognized the need to further consolidate and drive the development of QF, enhance recognition of qualifications in different industries and provide quality assured pathways for further studies and career development. Government also maintained its efforts in exploring more exchange and collaboration opportunities on QF with the Mainland and in the region. The Government committed to provide \$1.2 billion to the QF Fund to continue implementation of the relevant initiatives.

The Government introduced non-means tested subsidies for students and regularised the Study Subsidy Scheme for Designated Professions/Sectors (SSSDP) which was piloted in the 2015/6 academic year. Further details are provided in the section on financing lifelong learning.

## **2.8 Policy Support for Lifelong Learning - 2018**

The 2018 Policy Address states:

*"To further increase the opportunities and subsidies for local students to pursue post-secondary education, the Government has decided to step up support for self-financing sub-degree programmes that nurture talents to meet our social and economic development needs. Starting from the 2019/20 academic year, about 2,000 students per cohort will be subsidised to undertake designated self-financing sub-degree programmes through the SSSDP. Current students of the designated programmes will also receive the subsidy. It is expected that about 4,000 students will benefit in each academic year. This initiative will incur \$120 million additional recurrent expenditure each year".*

## **2.9 Policy Support for Elder Learning**

Since 2007 schools and tertiary institutes have been encouraged to operate elder academies through a subsidy scheme administered by the Labour and Welfare Bureau and the Elderly Commission. There are currently about 130 elder

academies in primary, secondary and tertiary institutions throughout the territory, with six universities involved.

### 3 Governance

#### 3.1 Statutory Framework

There are three key statutory instruments on education:

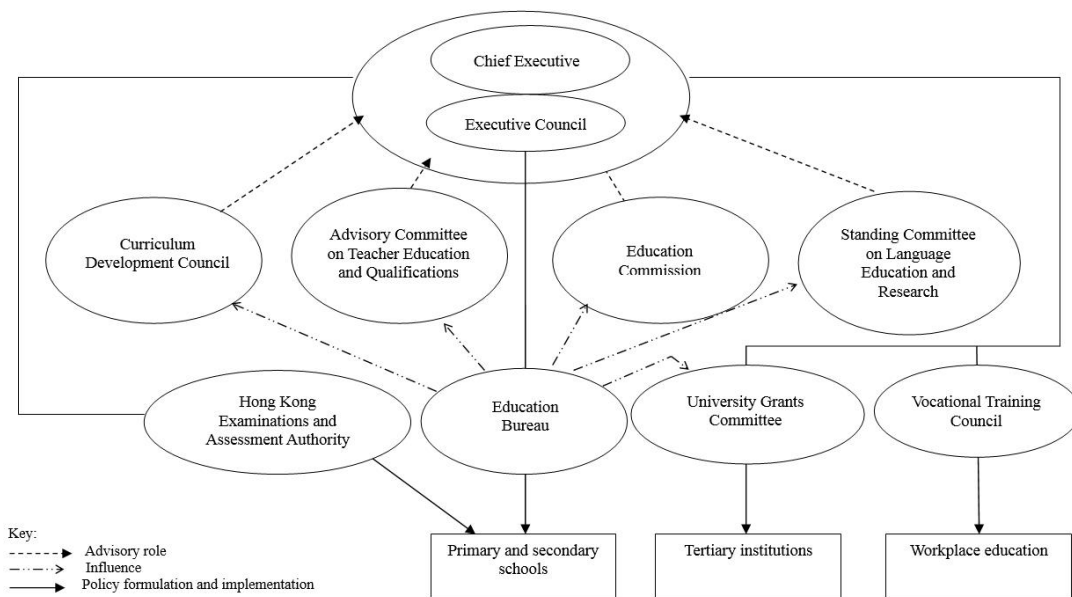
- Education Ordinance (Cap 279)
- Post Secondary Colleges Ordinance (Cap. 320)
- Non-Local Higher and Professional Education (Regulation) Ordinance (Cap. 493)

The eight UGC-funded universities, the Open University, the Hong Kong Academy for Performing Arts, the Vocational Training Council and Employees Retraining Board (ERB) were created as statutory bodies under their own ordinances.

The Hong Kong Council for Accreditation of Academic and Vocational Qualifications (HKCAAVQ) and the Hong Kong Examinations and Assessment Authority (HKEAA) were also created as a statutory bodies under their own ordinances.

The administration of the education system is shown in Figure 7.

Figure 7 The Education System in Hong Kong



From Cheng (1996) and Kennedy (2005)

## **3.2 Committees and Councils**

### **3.2.1 LegCo Panel on Education**

The Sixth Legislative Council (2016 - 2020) Panel on Education has the following terms of reference:

- to monitor and examine Government policies and issues of public concern relating to education;
- to provide a forum for the exchange and dissemination of views on the above policy matters.
- to receive briefings and to formulate views on any major legislative or financial proposals in respect of the above policy area prior to their formal introduction to the Council or Finance Committee;
- to monitor and examine, to the extent it considers necessary, the above policy matters referred to it by a member of the Panel or by the House Committee; and
- to make reports to the Council or to the House Committee as required by the Rules of Procedure.

It meets once per month (sometimes twice) and in has 33 members. A list of papers and reports is available at: <https://www.legco.gov.hk/yr19-20/english/panels>.

### **3.2.2 Education Commission**

The EC was set up in 1984 as a non-statutory body to advise the Government on the overall development of education. The EC acts as:

- an advisor to Government on issues that are of general concern to all education sectors/stages, the cross-sectoral impact of education issues, and the long-term strategic development of education in Hong Kong;
- a partner with Government in co-ordinating and monitoring the planning and development of education at all levels, and advising on the implementation of major education initiatives based on the policy reports compiled by the other executive/advisory bodies, and the progress reports compiled by the Government;
- an inspirer and catalyser of public views on matters relating to education through maintaining a close liaison with the education sector and the community at large. EC should also help ensure that the views and

proposals from other executive/advisory bodies are consistent with one another;

- a "learning organisation" which keeps abreast of the latest development in education and other sectors (including social, economic and political developments) in both local and international settings.

The EC focuses on:

- monitoring progress of education reform in the following seven key areas: language education, curriculum reform, support for schools, professional development, admission systems, assessment mechanisms and increase in post-secondary education opportunities; to co-ordinate the work of education-related executive and advisory bodies; and to advise the Government on how to implement the reform more smoothly and effectively;
- preparing statistics to allow assessment of the effectiveness of the reform following implementation; and
- working in collaboration with all the relevant advisory and executive bodies to study in what ways further support may be provided to schools and teachers; keep close contact with all the concerned parties so as to enhance the transparency of its work; and collate more views and advice in order to achieve the best results of the education reform.

Under its terms of reference, the EC:

- advises the Secretary for Education on the overall educational objectives and policies and the priorities for implementation of its recommendations having regard to resources available;
- co-ordinates the work of UGC, VTC and other education advisory bodies;
- receives and comments on the periodic reports submitted to the Government by UGC, VTC and other major advisory bodies on education;
- requests the above-mentioned bodies to initiate discussion on issues falling within their respective purview as necessary;
- entertains requests from the Government for advice on educational issues; and
- initiates education research as appropriate.

The EC oversees the operation of the Quality Education Fund (QEF), with advice from the Quality Education Fund Steering Committee. The EC submits its reports and recommendations to the Secretary for Education.



Source: <https://www.e-c.edu.hk/en/home/index.html>

### 3.2.3 Quality Education Fund Steering Committee

The QEF was established in early 1998 with capital of \$5 billion to fund community initiatives which promote quality education in Hong Kong. The Quality Education Fund Steering Committee (QEFSC) advises on the policies and operation of the QEF and also makes recommendations to the Fund's Trustee on the award of grants. Since its establishment, the Fund has supported over 9,600 projects with a total grant amounting to around \$4.5 billion. A QEF Investment Committee (IC) was set up alongside the QEFSC to set policies for and monitor the investment of the QEF. Education Bureau provides the secretariat to administer the QEF.

Source: [https://qef.org.hk/english/aboutus/org\\_structure.html#](https://qef.org.hk/english/aboutus/org_structure.html#)

### 3.2.4 Committee on Professional Development of Teachers and Principals

The Advisory Committee on Teacher Education and Qualifications, was renamed Committee on Professional Development of Teachers and Principals (COTAP) in 2013.

The purpose of COTAP is to promote the professional development of teachers and principals. The committee advises Government on policies and measures relating to the professional development of the teaching profession. COTAP performs other functions, such as commissioning and/or conducting educational research, evaluation studies and professional development programmes. It provides a platform for promoting professional sharing, collaboration and networking with stakeholders in school management, educational bodies and organizations.

Source: <https://www.cotap.hk/index.php/en/>

### 3.2.5 Committee on Self-financing Post-secondary Education

The University Grants Committee submitted a report titled “Aspirations for the Higher Education System in Hong Kong” in 2010. The Government endorsed the overall recommended strategies and agreed to set up an advisory body to oversee the development of the self-financing post-secondary education sector in Hong Kong. As a result, the Committee on Self-financing Post-secondary Education (CSPE) was established in April 2012 to advise the Government on the development of the self-financing post-secondary education sector from macro and strategic perspectives. It serves as a platform for discussing issues of common interest to the sector, promoting the quality and development of the sector, as well as formulating and promoting good practices.

Source: <https://www.cspe.edu.hk/en/AboutUs.html>

### 3.2.6 Curriculum Development Council (2017-2019)

The Curriculum Development Council (CDC) advises the Government on all matters related to curriculum development from kindergarten to senior secondary levels.

Source: <https://cd1.edb.hkedcity.net/cd/cdc/en/>

### 3.2.7 Standing Committee on Language Education and Research

The Standing Committee on Language Education and Research (SCOLAR) advises the Government on language education issues. Its role is to:

- advise on the overall policy on language education, including the medium of instruction;
- advise on the setting of language standards, including general goals for language learning at different levels of education and specific language attainment targets at each stage of education;
- advise on measures to be adopted to attain the standards mentioned in (ii) above;
- identify research and development projects which are necessary for the enhancement of language proficiency and language in education, and to implement or oversee the satisfactory completion of such projects;
- co-ordinate all research and development activities relating to language proficiency by relevant agencies; monitor their progress, evaluate their effectiveness, and make recommendations to the Government accordingly;
- develop and promote a public education and information programme in respect of language proficiency issues; and
- advise the Trustee of the Language Fund on policies and procedures governing the operation of the Language Fund, and to provide such assistance as the Trustee may require to support, directly or indirectly, the enhancement of the language proficiency of the community.

Source: [http://www.language-education.com/eng/scolar\\_tor.asp](http://www.language-education.com/eng/scolar_tor.asp)

### 3.2.8 Standing Committee on Legal Education and Training

In November 1999, the Steering Committee on Legal Education and Training was established to conduct a comprehensive review of legal education and training in Hong Kong.

The functions of the Standing Committee are:

- (a) to keep under review, evaluate and assess: the system and provision of legal education and training in Hong Kong; without prejudice to the generality of subparagraph (i), the academic requirements and standards for admission to the Postgraduate Certificate in Laws programme;
- (b) to monitor the provision of vocational training of prospective legal practitioners in Hong Kong by organizations other than The Law Society of Hong Kong or Hong Kong Bar Association;
- (c) to make recommendations on matters referred to in the above paragraphs; and
- (d) to collect and disseminate information concerning the system of legal education and training in Hong Kong.

Source: <https://www.sclet.gov.hk/eng/index.htm>

### 3.2.9 University Grants Committee

The UGC does not have statutory or executive powers. Each of the higher education institutions is an autonomous body with its own Ordinance and Governing Council. The UGC seeks to promote responsible understanding between the institutions, the Government and the community at large. It mediates interests between institutions and the Administration. The UGC safeguards academic freedom and the autonomy of the institutions, whilst also ensuring value for money for the taxpayers.

The main function of the UGC is to allocate funding to its funded institutions, and to offer impartial and respected advice to the Government on the strategic development and resource requirements of higher education in Hong Kong. Specifically, the Committee has to determine precise grant recommendations in the light of indications of the level of funding that can be made available, overall student number targets by level of study and year to meet community needs as agreed with the Government, the breakdown of these numbers between institutions, as agreed in principle by the institutions. The Committee also provides the institutions with developmental and academic advice, having regard to international standards and practice.

Source: <https://www.ugc.edu.hk/eng/ugc/index.html>

### **3.3 Government Departments, Bureaus, Agencies and Statutory Bodies**

#### **3.3.1 Education Bureau**

The Bureau is responsible for:

- formulating, developing and reviewing policies, programmes and legislation in respect of education from pre-primary to tertiary level; and
- overseeing the effective implementation of educational programmes.

The Bureau monitors the services provided by:

- the UGC, the Student Finance Office (SFO), the Hong Kong Examinations and Assessment Authority (HKEAA), the Hong Kong Council for Accreditation of Academic and Vocational Qualifications (HKCAAVQ) and the VTC.

#### **3.3.2 Labour and Welfare Bureau**

Elder learning, through the Elder Academy Scheme, is run by the Advisory Committee of the Elderly Commission, under the Labour and Welfare Bureau.

#### **3.3.3 Leisure and Cultural Services Department**

Leisure and Cultural Services Department (LCSD) has responsibility for cultural programmes, sports programmes, greening, heritage and museum programmes, Hong Kong public libraries' extension activities, international games and events, and major community programmes.

#### **3.3.4 Working Family and Student Financial Assistance Agency**

The Working Family and Student Financial Assistance Agency (WFSFAA) administers financial assistance to needy families and to students through the Student Finance Office. It administers grants and loans available to students including the Non-means-tested Loan Scheme for Full-time Tertiary Students (NLSFT).

#### **3.3.5 Home Affairs Bureau**

The Trust Funds and Temples Joint Secretariat of the Home Affairs Bureau (HAB) provides administrative support for education related charitable funding including The Sir Edward Youde Memorial Fund, Grantham Scholarships Fund, The Hong Kong Jockey Club Music and Dance Fund, Sir Robert Black Trust Fund and the Li Po Chun Charitable Trust Fund.

### 3.3.6 Labour Department

The Work Orientation and Placement Scheme (WOPS) is administered by the Selective Placement Division of the Labour Department. This provides assistance with employment of people with disabilities. The scheme facilitates mentoring and training for employees.

### 3.3.7 Social Welfare Department

Social Welfare Department oversees the NGOs that operate the Integrated Vocational Rehabilitation Centres for people with disabilities or special needs.

### 3.3.8 Hong Kong Council for Accreditation of Academic and Vocational Qualifications

The Hong Kong Council for Accreditation of Academic and Vocational Qualifications (HKCAAVQ), formerly the Hong Kong Council for Academic Accreditation (HKCAA), was established in 1990 as an independent statutory body to provide authoritative advice on academic standards of degree programmes in higher education institutions in Hong Kong. In 2007, the Council was reconstituted under the HKCAAVQ Ordinance (Chapter 1150). The HKCAAVQ took on responsibility for the vocational sector and statutory roles as the Accreditation Authority and Qualifications Register Authority under the Hong Kong Qualifications Framework under the Accreditation of Academic and Vocational Qualifications Ordinance (Chapter 592).

The HKCAAVQ provides quality assurance and assessment services to education and training institutions, course providers and the general public. In addition to its statutory roles, the HKCAAVQ also provides advisory and consultancy services in education qualifications and standards to government bureaux and other organisations in Hong Kong and the Asia-Pacific region.

### 3.3.9 Hong Kong Examinations and Assessment Authority

The Hong Kong Examinations and Assessment Authority (HKEAA) was established under the Hong Kong Examinations Authority Ordinance Chapter 261 in 1977 (amended as the Hong Kong Examinations and Assessment Authority Ordinance in 2002). It is an independent, self-financing statutory body. The major function of the HKEAA is to administer public examinations in Hong Kong. This includes administering significant numbers of international and professional examinations.

## 3.4 Private Sector Institutes

Many professions have professional bodies and institutes that determine and monitor the requirement for continued professional development (CPD) and training in order to maintain membership of a profession. In the case of the finance industry, CPD requirements are prescribed in law.

## 4 Employment Related Lifelong Learning

Hong Kong has moved from manufacturing to a service based economy and the nature of employment and hence training requirements has changed. An education system that can adapt and provide flexible training solutions in response to needs of employers is essential to maintain a fully employed workforce. This section reviews education and training provision post-secondary school.

### 4.1 Institutes

There are eight UGC-funding universities:

University of Hong Kong

Hong Kong Polytechnic University

Chinese University of Hong Kong

Education University of Hong Kong

City University of Hong Kong

Hong Kong University of Science and Technology

Hong Kong Baptist University

Lingnan University (Hong Kong)

In addition, nine institutions offer four-year self-financed degree programmes, seven higher education institutions run two-year self-financed top-up degree programmes (equivalent to the third and fourth years of a full university degree) and 22 higher education institutions provide self-financing two-year sub-degree programmes (equivalent to the first and second years of a university degree).

Source: Wong, P., Ng, P.M.L., Mak, C.K.Y. et al. High Educ (2016) 71: 455.  
<https://doi.org/10.1007/s10734-015-9915-5>

Institutes offering accredited post-secondary programmes (not including degree programmes offered through JUPAS):

Caritas Bianchi College of Careers

Caritas Institute of Community Education

Caritas Institute of Higher Education (formerly known as Caritas Francis Hsu College)

Centennial College

Chu Hai College of Higher Education

UOW College Hong Kong/Community College of City University

Gratia Christian College

Hang Seng Management College

HKCT Institute of Higher Education

Hong Kong Art School (a division of Hong Kong Arts Centre)

Hong Kong Baptist University - College of International Education and School of Continuing Education

Hong Kong College of Engineering

Hong Kong College of Technology

Hong Kong Institute of Technology

Hong Kong Nang Yan College of Higher Education

Hong Kong Shue Yan University

Lingnan University - Lingnan Institute of Further Education

SCAD Foundation (Hong Kong) Limited/ Savannah College of Art and Design, Inc.

The Chinese University of Hong Kong - School of Continuing and Professional Studies

The Education University of Hong Kong

The Hong Kong Polytechnic University - Hong Kong Community College and School of Professional Education and Executive Development

The Hong Kong University of Science and Technology

The Open University of Hong Kong

Li Ka Shing Institute of Professional and Continuing Education

Po Leung Kuk Stanley Ho Community College (programmes accredited by HK SPACE)

The University of Hong Kong - HKU School of Professional and Continuing Education and HKU SPACE Community College

Tung Wah College

Vocational Training Council:

Technological and Higher Education Institute of Hong Kong (THEi)

Institute of Professional Education And Knowledge (PEAK)

School for Higher and Professional Education (SHAPE)

Hong Kong Institute of Vocational Education (IVE)

Hong Kong Design Institute (HKDI)

Hotel and Tourism Institute (HTI)

Chinese Culinary Institute (CCI)

International Culinary Institute (ICI)

Maritime Services Training Institute (MSTI)

Youth College

Pro-Act by VTC

Integrated Vocational Development Centre (IVDC)

Shine Skills Centre

Yew Chung Community College

YMCA College of Careers

YMCA College of Continuing Education

Source: <https://www.edb.gov.hk/en/edu-system/postsecondary/local-higher-edu/institutions/index.html> and <https://www.cspe.edu.hk/en/institution-list.page>

#### 4.1.1 Summary of Accredited Programmes (2018-19)

78 Full-time locally-accredited publicly-funded sub-degree programmes provided by the VTC.

278 Full-time locally-accredited self-financing sub-degree programmes (from the above providers).

7 Full-time locally-accredited publicly-funded degree programmes by the HK Academy for Performing Arts.

142 Full-time locally-accredited local self-financing degree programmes (from the above providers).



31 Full-time locally-accredited non-local self-financing degree programmes from City University of Hong Kong - School of Continuing and Professional Education, Hong Kong Art School (a division of Hong Kong Arts Centre), Hong Kong Institute of Technology, SCAD Foundation (Hong Kong) Limited/ Savannah College of Art and Design, Inc, The University of Hong Kong - HKU School of Professional and Continuing Education.

225 Full-time locally-accredited local self-financing top-up degree programmes.

31 Full-time locally-accredited non-local self-financing degree programmes.

238 Senior year places of full-time UGC-funded undergraduate programmes.

Note: Locally accredited local programmes are provided by a local education provider

Locally accredited non-local programmes are provided by a local education provider in partnership with an overseas institution.

#### 4.1.2 Summary of Non-accredited Programmes

There are many overseas universities and institutes offering programmes in Hong Kong. These are either exempt or registered under the Non-local Higher and Professional Education (Regulation) Ordinance, Cap. 493.

The lists are long so registered programmes along with the overseas universities and local partners can be found at:

<https://www.edb.gov.hk/en/edu-system/postsecondary/non-local-higher-professional-edu/course/registered-course.html>

Exempted programmes and information can be found at:

<https://www.edb.gov.hk/en/edu-system/postsecondary/non-local-higher-professional-edu/course/exempted-course.html>

#### 4.1.3 The Diploma Yi Jin (DYJ) Programme

The Government launched this programme to:

- provide an alternative pathway for secondary 6 school leavers as well as adult learners to obtain a formal qualification for the purposes of employment and/or further study;
- equip students with an array of generic skills and general knowledge including basic language skills, information technology skills, mathematical reasoning skills and interpersonal skills, thereby enabling students to build a firm foundation in these aspects; and

- strengthen students' motivation to study and facilitate students in developing self-learning skills for the pursuit of further study independently.

The target students of the programme are Secondary 6 school leavers and adult learners aged 21 or above. The DYJ programme is run by some members institutions of the Federation for Self-financing Tertiary Education (FSTE). The participating institutions can be found at: <http://www.yijin.edu.hk/english/introduction.html>

#### 4.1.4 Overseas and Distance Learning

Overseas learning is an option available for all those who have the financial capacity to pay fees and living expenses at overseas universities and training institutions. In some cases overseas training is provided as part of a local training requirement e.g. Government Flying Services cadet pilots are initially trained overseas.

Distance learning courses are available to anybody from anywhere. Advice from Government is:

*"Local consumers are reminded that purely distance learning courses are not required to be registered/exempted under the Ordinance but operators of such courses may choose to do so to demonstrate that they meet the registration criteria.*

*Local consumers who plan to enrol in any non-local higher academic or professional courses to be conducted via distance learning mode are strongly advised to check with the course provider/operator on the course details, in particular the qualifications to be obtained, the payment arrangements and refund policy before making payment."*

(Source: Education Bureau website)

Distance learning may also be self-motivated through the use of Massive Open Online Courses (MOOCs). This report does not provide specific information on MOOCs, either Hong Kong or overseas based but refers readers to:

[https://en.wikipedia.org/wiki/Massive\\_open\\_online\\_course](https://en.wikipedia.org/wiki/Massive_open_online_course), as a place to start a search for specific information.

## 4.2 Industry Training and Continued Professional Development

According to the Government Census and Statistics Department the four key industries of the Hong Kong economy are: financial services, tourism, trading and logistics, and professional and producer services.

Other "Selected Industries" are identified by the Government as the industries where Hong Kong enjoys advantages for further development. These include:

cultural and creative industries, medical services, education services, innovation and technology, testing and certification services, and environmental industries.

While much of the initial professional training required for industry is provided by the institutes listed in section 4.1, this section covers training that is led by industries and industry bodies.

This section addresses continuing professional development (CPD) which is the process of tracking and documenting the skills, knowledge and experiences that are gained formally and informally during the work process that go beyond any initial training. It is a record of what is experienced, learnt and applied as part of the job. Some organisations interpret CPD as a training or development plan which may involve formal training and education in addition to work experience. There are a number of professions, in particular, that usually include CPD as part of career development, such as: teachers, civil servants, health care professionals, lawyers, accountants, financial services providers, engineers, architects, environmental professionals, logistics providers etc.

CPD needs to be a documented process that is self-directed by the employee and should not be employer directed. There are many third-party providers of CPD such as professional institutes, universities and private sector training centres.

In addition to formal CPD requirements most professions provide “learning on the job” which involves workers gaining work experience from co-workers, mentors and some formal training programmes.

#### 4.2.1 Financial Services

There are a number of Hong Kong professional bodies (regulatory bodies, authorities and registration boards are not included) associated with the financial services sector. There are also many overseas professional and international bodies that are recognized by Hong Kong authorities, but only specific Hong Kong bodies are listed here:

- Hong Kong Institute of Certified Public Accountants
- The Hong Kong Federation of Insurers
- The Hong Kong Confederation of Insurance Brokers
- Professional Insurance Brokers Association
- Hong Kong Society of Certified Insurance Practitioners
- Insurance and Financial Planners Association
- Hong Kong Institute of Bankers

- The Hong Kong Association of Banks
- Hong Kong Securities and Investment Institute
- Hong Kong Securities Association Ltd.
- Hong Kong Investment Funds Association
- Private Wealth Management Association
- Hong Kong Venture Capital and Private Equity Association
- Treasury Markets Association
- Asia Securities Industry & Financial Markets Association
- Institute of Financial Planners of Hong Kong
- The Hong Kong Foreign Financial Institutions Associations
- Hong Kong Investment Funds Association
- Hong Kong Investor Relations Association
- Hong Kong Securities Association Limited
- Hong Kong Trustees' Association Limited
- The DTC Association
- The Hong Kong Society of Financial Analysts
- The Hong Kong Institute of Financial Analysts and Professional Commentators Ltd.

Initial training for work in the financial sector will generally take place at an institute listed in Section 4.1 or an overseas institute. Provision for CPD is prescribed under "The Guidelines on Continuous Professional Training" made under section 399 of the Securities and Futures Ordinance, Cap. 571 ("SFO") for registered professions.

The Hong Federation of Insurers (HKFI) states as one its missions and visions: "strengthen professional training across the industry and promote insurance as a career of choice" and "promote and organize quality insurance training, education, industry awards and conferences to nurture talent and enhance the industry's professionalism". Insurance brokers and professionals registered with the Professional Insurance Brokers Association (PIBA), the Insurance Agents Registration Board (IARB) and the Insurance Authority (IA) are required to undertake 10 hours of CPD per calendar year.

The Hong Kong Confederation of Insurance Brokers (HKFIB), PIBA, IARB and the IA organize CPD Seminars for members and enable CPD hours to be logged.

The Enhanced Competency Framework (ECF) was developed by a Task Force chaired by the Hong Kong Monetary Authority with representatives from the Private Wealth Management Association (PWMA), The Hong Kong Institute of Bankers (HKIB), Hong Kong Securities and Investment Institute (HKSII), and Treasury Markets Association (TMA). The ECF sets out an enhanced level of competency expected of relevant practitioners in the private wealth management industry. The ECF is a voluntary scheme. It is separate from the existing licensing or registration regime for the securities industry - individuals are still required to meet the licensing or registration requirements under the Securities and Futures Ordinance.

The ECF's objective is to ensure individuals providing services to clients have an enhanced level competency in the technical, ethical and compliance areas. The ECF covers knowledge of major Asia-Pacific markets.

The PWMA administers the accreditation and exemption under the ECF, Certified Private Wealth Professional (CPWP) certification, and on-going professional training for its member institutions. Information on CPD and ongoing professional training programmes can be found on the HKIB website: <https://www.hkib.org/en/training-examinations/cpd>.

The Institute of Financial Planners of Hong Kong (IFPHK) runs the flagship programmes Associate Financial Planner (AFP) and Certified Financial Planner (CFP). These programmes originated in the US and have been adopted by 28 countries. They provide appropriate training and certification for financial planners. The CFP requires 240 hours of initial training and has a requirement for 15 hours per year of CPD.

Professionals are expected to train in the country in which they will practise, but they can take additional specific training and take an exam if they wish to operate in another country. In the region, China has its own requirements but there is collaboration between the professional bodies in China and Hong Kong, and other countries.

The certification needs renewal every year. Many practitioners hold other registrations or professional qualifications that also require CPD and the IFPHK recognizes these for CPF renewal i.e. the same CPD hours can be accredited to multiple professional bodies or registrations. However, each year members must spend two hours specifically on ethics education.

The IFPHK is also a major provider of CPD courses to the financial sector and services corporate clients on behalf of employees. The IFPHK introduced the scheme Qualified Retirement Advisor (QRA) in 2015. This provides training to

advisors on retirement planning. This scheme has attracted interest from a number of parties including social workers dealing with the elderly and those in financial difficulties and also from employees of the Mandatory Provident Fund Authority. Interested parties are invited, at no cost, to attend training sessions for their information and many decide to take the full training course and become certified QRAs. The scheme is also aimed at retirees who become “Community Ambassadors” in retirement planning. The certification is renewable annually and requires 5 hours of CPD. The IFPHK also runs the Financial Education Leadership Award which looks to recognize to people providing pro bono services on financial planning.

Hong Kong Securities Association Limited is accredited by the Securities and Futures Commission (SFC) to conduct CPD (referred to as continuous professional training [CPT]) courses so that members are prepared to deal with new products, rules or regulatory requirements. Regular seminars and CPT courses for are conducted for members. These are applicable to persons registered under the Securities and Futures Ordinance and are recognized by the SFC as fulfilling CPT hours requirements.

One vision of the Hong Kong Trustees' Association Limited is to "contribute towards enhancing the education and knowledge of practitioners in the trust industry through relevant trust accreditation and training programmes".

In addition to the industry bodies, the VTC provides CPD courses to the financial sector.

#### 4.2.2 Tourism

Inbound tourism covers retail trade, accommodation services (hotels, guesthouses, boarding houses and other short term accommodation), food and beverage services, transport and personal services etc. as provided to visitors. Outbound tourism covers cross-boundary passenger transport services, travel agency, reservation services and related activities for Hong Kong residents travelling abroad.

The Travel Industry Council (TIC) has the responsibility to regulate outbound and inbound travel agents under the Cap. 218 Travel Agents (Amendment) Ordinance, 2002. The mission is:

- to maintain a high standard of professionalism within the industry
- to protect the interests of both the trade and travellers

One of the services it provides to member agents is to organize training courses, seminars, workshops etc., to upgrade the standard of industry members and to publish information on the TIC website and to help members recruit staff.

The TIC is also responsible for setting the CPD requirements for tour guides.

The industry's own professional body is the Hong Kong Association of Travel Agents (HATA) which has an aim *"To establish a minimum qualification of experience and good behaviour to warrant the use of the designations "Travel Agent" – "Tour Operator" – "Hotel" – "Hire Car Company" and "Restaurant" without which membership of The Association will be withheld"*. The HATA does not appear to require CPD for its members.

Other professional associations connected with tourism include: the Hong Kong Outbound Tour Operators Association Ltd, Quality Tourism Services Association, The Hong Kong Association of Registered Tour Co-ordinators and The Society of IATA Passenger Agents Ltd. There do not appear to be CPD requirements by these organizations.

Closely associated with tourism, the hotel industry is represented by the professional bodies: The Hong Kong Hotels Association (HKHA) and The Federation of Hong Kong Hotel Owners. According to the HKHA website:

*"One of the key functions of the Association is to offer educational programmes to members through training courses and seminars. Some programmes are designed for more senior industry executives, whereby professors from leading international hotel schools are invited to conduct these programme...."*

The food and beverage industry is also closely related with the tourism industry. This has a number of professional bodies: The Hong Kong Federation of Restaurants and Related Trades, The Association of Restaurant Managers, The Institution of Dining Art, The Association for Hong Kong Catering Services Management Ltd, The Eating Establishment Employees General Union, The Food and Beverage Management and Professional Staff Association, and The Catering and Hotels Industries Employees General Union.

The Institution of Dining Art ("Rice Seedling Society" in literal translation from Chinese) claims to be the only professional institution in Hong Kong's catering industry with professional and academic development.

There does not appear to be other formal requirements for CPD in the hotel or catering industries based on the professional associations, however this does not preclude requirements by individual employers.

#### 4.2.3 Trading and Logistics

According to government, trading and logistics breaks down to: wholesale, import/export trade, freight transport and storage services, postal and courier services. Of the four "pillar" industries, trading and logistics is the largest in terms of both GDP contribution and employment. However, the industry recorded the lowest growth, at 57%, between 2002 and 2012. It also lagged

behind other pillar industries in job creation with the number of people employed remaining virtually unchanged at around 764,900 over the period.

Source: LegCo Research Brief Issue No. 3 2014 – 2015 - Four Pillars and Six Industries in Hong Kong: review and outlook

There are many professional associations covering trading and logistics:

- Hong Kong & Kowloon Motor Boats & Tug Boats Association
- Hong Kong Association of Freight Forwarding and Logistics Ltd
- Hong Kong Cargo Vessel Traders' Association Ltd
- Hong Kong CFS & Logistics Association Ltd
- Hong Kong Container Terminal Operators Association Limited
- Hong Kong Container Tractor Owner Association Ltd
- Hong Kong Godown Association Limited
- Hong Kong Liner Shipping Association
- Hong Kong Logistics Association
- Hong Kong Shipping Industry Institute
- The Nautical Institute (Hong Kong branch)
- The Chamber of Hong Kong Logistics Industry
- The Chartered Institute of Logistics & Transport in Hong Kong
- The Hong Kong Shipowners Association Ltd
- The Hong Kong Shippers' Council
- The Institute of Chartered Shipbrokers (Hong Kong Branch)

The Chartered Institute of Logistics and Transport in Hong Kong (CILTHK) is the professional body for those engaged in various sectors of transport and logistics, including air, sea and land, for both passengers and freight transportation.

Its mission is: *“The CILT sets the highest standards of professional practice through education, a comprehensive qualifications framework, career experience, professional grades and continuing professional development”*. This provides advice on CPD on its website for members.

The Hong Kong Management Association provides information on certified courses in aspects of trade and logistics.



#### 4.2.4 Professional and Producer Services

Professional services cover legal, accounting, auditing, architecture, engineering, management, management consultancy, information technology related services, advertising, specialized design and related services, etc.

Producer services refer to services for use by other companies in the local economy, as well as exports of services to companies and individuals.

The Law Society of Hong Kong requires all solicitors and trainees to accumulate 15 CPD points in each CPD practice year. A trainee solicitor must accumulate 30 CPD points by the end of his period of employment as a trainee solicitor.

The Hong Kong Academy of Law is described as "a manifestation of the dedication of the Law Society of Hong Kong". This academy organizes legal training courses, seminars, and community activities (which are also open to the general public) and in particular provides CPD courses for the legal profession. The Faculty of Law at HKU provides The Continuing Legal Education (CLE) programme which includes accredited courses for solicitors that are tailored to the CPD programme of the Law Society of Hong Kong.

Hong Kong Institute of Certified Public Accountants has a requirement for its members to undertake CPD in order to maintain membership. At the time of this report members were required to complete "at least 120 hours of relevant professional development activity in each rolling three-year period".

Hong Kong Mediation and Arbitration Centre (HKMAAC) a professional association established by a group professionals with an aim to promote mediation and arbitration services by both efficient and cost effective ways in Hong Kong. Members come from different professional backgrounds: lawyers, former prosecutors, accountants, medical staff, bankers, senior executives, engineers, surveyors, social workers, teachers etc. The HKMAAC requires members to undertake 5 hours of CPD per year.

The Hong Kong Management Association (HKMA) provides training in areas of business and management at different levels of the QF. These include degree level qualifications offered in partnership with the tertiary institutes and in-house sub-degree level programmes. The HKMA has 7 training centres across Hong Kong. It offers courses covering: business management, child psychology and development, digital marketing/big data, disciplinary and security management, finance and accounting, health care management, human resources management legal and law, lifestyle/beauty/wine/body shaping, logistics and import-export management, project management, property management, psychology, and secretarial and company secretarial studies.

The development of infrastructure (highways, rail, drainage, water supply, housing etc.) requires professional services from both government and private

sector. The Hong Kong Institute of Engineers requires members to undertake 30 hours of CPD per year. Hong Kong Institute of Planners requires 25 hours per year. The Hong Kong Institute of Surveyors requires its members to undertake 60 hours of CPD over a three year period. Hong Kong Institution of Highways and Transportation requires 25 hours per year averaged over 3 years. Hong Kong Institute of Urban Design requires 25 hours of CPD per year.

#### 4.2.5 Other Important Sectors

##### *Cultural and creative industries*

Cultural and creative industries comprise different component domains, which mainly include advertising; architecture; art, antiques and crafts; design; film, video and music; performing arts; publishing; software, computer games and interactive media; and television and radio.

The Hong Kong Institute of Architects has a mandatory requirement for members to undertake 25 hours per year of CPD.

##### *Medical services*

Medical services cover medical services provided by private hospitals, clinics, medical and dental practitioners, nursing and residential care for the elderly and persons with substance abuse and disabilities as well as medical-related activities including retail sales of medical products and medical insurance.

Medical specialists are required to undertake continuing medical education (CME) through their professional body. For example, the College of Surgeons of Hong Kong, The Hong Kong College of Paediatricians, the Hong Kong College of Anaesthesiologists, the Hong Kong Radiologists etc. The Medical Council of Hong Kong provides CME for practitioners not engaged in specialist CME.

Source: [https://www.mchk.org.hk/english/cme/cme\\_overview.html](https://www.mchk.org.hk/english/cme/cme_overview.html)

##### *Education*

Education services cover kindergartens, private primary and secondary schools (both profit and non-profit making), tutorial schools, self-financed post-secondary and other university courses (including university courses for non-local students), and other education-related services. Training provided to business firms is also included, as it is an important activity of continuing education for enhancing the competency of staff and hence productivity.

In addition to providing education, teachers are required to undertake CPD. The Committee on Professional Development of Teachers and Principals advises the EDB on policies relating to the professional development of the teaching profession at different career stages and provides a platform for professional sharing, collaboration and networking.

Professional development requirements are in place to help aspiring, newly appointed and serving principals enhance their leadership knowledge and address their developmental needs at different career stages. So far, approximately 1,500 aspiring principals have attained the Certification for Principalship and about half of them have become principals.

Source: Hong Kong Government Fact Sheet on Education, May 2018

### *Innovation and technology*

Innovation and technology covers research and development (R&D) as well as activities relating to the commercialisation of R&D outputs. This leads to development and introduction of technologically new or significantly improved products or processes in relevant organisations for commercial purposes.

### *Testing and certification services*

Testing and certification services covers organizations engaged in technical testing and analysis; cargo inspection, sampling and weighting; and medical and X-ray laboratories as their major economic activities. According to the Trade Development Council in 2016 Hong Kong's testing and certification industry comprised 770 establishments, most of which were private laboratories, employing a total of 18,000 people.

Many laboratories and certification bodies in Hong Kong are accredited. The Hong Kong Accreditation Service (HKAS) under the Innovation and Technology Commission (ITC) provides accreditation service for laboratories, certification bodies and inspection bodies through the Hong Kong Laboratory Accreditation Scheme (HOKLAS), Hong Kong Certification Body Accreditation Scheme (HKCAS) and Hong Kong Inspection Body Accreditation Scheme (HKIAS). As of April 2018, there were 228 accredited laboratories/proficiency testing providers/reference material producers, 25 accredited certification bodies and 21 accredited inspection bodies in Hong Kong.

Source: <http://hong-kong-economy-research.hktdc.com/business-news/article/Hong-Kong-Industry-Profiles/Testing-and-Certification-Industry-in-Hong-Kong/hkip/en/1/1X000000/1X066MIO.htm>

This service area embraces many technical areas covered by a number of professional bodies. These include the Hong Kong Chemical Society, the Hong Kong Branch of the Royal Society of Chemistry, the Hong Kong Chemical, Biological and Environmental Engineering Society, Hong Kong Association for Testing, Inspection and Certification Limited.

There is little information available on CPD in this sector.

### *Environmental industries*

Environmental industries include sewerage and waste management, recycling, environmental engineering, consultancy services as well as import/export and wholesale trading of waste and scrap.

Professional institutes associated with environmental industries which require CPD include: the Chartered Institution of Water and Environmental Management (CIWEM HK); Environmental Management Association of Hong Kong (EMAHK); Hong Kong Institute of Acoustics (HKIOA); Hong Kong Institute of Environmental Impact Assessment (HKIEIA); Hong Kong Institute of Environmental Protection Officers (HKIEPO) and Hong Kong Institute of Qualified Environmental Professionals Limited (HKIQEP).

There are also professional bodies such as Hong Kong Waste Management Association (HKWMA), The Hong Kong Environmental Industry Association (HKEIA) and the Environmental Managers Contractors Association (EMCA). CPD requirements are not identified for these bodies.

### *Construction Sector*

Government Census data for March 2018 indicated that there were 120,723 manual construction workers in employment. At the same time total employment was 3,038,841 making manual construction workers 4% of the workforce.

In order to advise government on the industry, the Construction Industry Council (CIC) was formed in 2007. It consists of a chairman and 24 members representing various sectors of the industry including employers, professionals, academics, contractors, workers, independent persons and Government officials. The main functions of CIC are to forge consensus on long-term strategic issues, to convey the industry's needs and aspirations to Government, as well as providing a communication channel for Government to solicit advice on all construction-related matters. CIC is empowered to formulate codes of conduct, administer registration and rating schemes, undertake research and manpower development, facilitate adoption of construction standards, promote good practices and compile performance indicators.

The CIC provides in-house training in: basic craft courses, adult short courses, enhanced construction manpower training scheme and training for inmates of Correctional Services Department. It also operates other collaborative training programmes, for example, the Contractor Cooperative Training Scheme. This is a "First-hire-then-train" scheme. An applicant is employed by a contractor and receives the on-job training by the employer. Eligible persons can receive a training subsidy and be assessed for skills level. During the training period the employer pays the trainee a salary which includes the training subsidy provided by CIC.

In 2017 the CIC set up the Hong Kong Institute of Construction (HKIC) to conduct programme improvements and validations under with the Qualification Framework. The first of these is the Diploma in Construction (Painting & Decoration). HKIC has incorporated innovative elements into other programmes, such as introducing the Application of Building Information Modeling (BIM), teaching drone technology in the Advanced Diploma Programme, and adopting the use of simulators in machinery operation and welding courses. The HKIC oversees the Mandatory Basic Safety Training Course (Construction Work)[Green Card Training Course]. All construction workers legally have to hold a green card to work on a construction site. The initial training is a one day course and every 3 years holders are required to undertake a half day refresher course for renewal of the card.

### *Disciplined Services Training*

Six regular forces report to the Security Bureau:

- Hong Kong Police Force (and Hong Kong Auxiliary Police Force)  
Hong Kong Police College is responsible for all matters relating to training within the Hong Kong Police except internal security, Auxiliary, and Marine Police training. Training includes recruit and continuation training, crime investigation training, police driver training and weapon tactics training. The information technology training, command training, local and overseas management training, some specialist courses and periodic courses on firearms and first aid are also provided by the Police College.
- Hong Kong Fire Services Department (and Emergency Ambulance Service)  
Fire Services Training School (FSTS) provides initial training for recruit fire and ambulance personnel. It also provides refresher and advanced training courses for all fire personnel. Fire Services Ambulance Command Training School (FSACTS) provides initial and paramedic training to recruits and ambulance personnel. It also provides Advanced Ambulance Aid Training at first-responder level to serving fire personnel.
- Correctional Services Department  
Recruits have to attend either 23-weeks or 26-weeks basic training which includes theory and practice.  
Field training in appropriate institutions is arranged for recruits. Correctional Services Department (CSD) strategic training policy organizes development and management training. Staff receive special training for jobs such as handling dogs. Staff may attend special courses, such as the Advanced Diploma in Corrections, Enrolled Nurse and Registered Nurse training courses.

- Customs and Excise Department

The Customs and Excise Training School was commissioned in 1974. It provides residential training for new recruits; functional development training and specialized training to serving staff; as well as regional training for the World Customs Organization members in the Asia Pacific Region. The school has an area of 40,000m<sup>2</sup> and can accommodate 280 new recruits for residential training at any one time.

- Immigration Department

Newly recruited Immigration Officers are required to undergo a 25-week residential induction training at the Immigration Service Institute of Training and Development. This is located at Castle Peak Bay, Tuen Mun and was inaugurated in 2005.

- Government Flying Service (GFS)

New Government Flying Service (GFS) staff are recruited as Cadet Pilots. They are sent to an overseas flight training institute for a 14-month course of professional pilot basic training. Having successfully completed the course and passed the examinations, Cadet Pilots return to Hong Kong with a Commercial Pilot's Licence. They then go through a process of conversion training within the GFS to become co-pilots and eventually aircraft commanders. It takes about ten years of training and operational experience to become a fully-fledged commander in the GFS.

### **4.3 Employee's Retraining Board**

The Employees Retraining Board (ERB) is an independent statutory body established in 1992 under the Employees Retraining Ordinance. The ERB coordinates, funds and monitors training courses and services that are market-driven and employment-oriented so as to meet the changing needs of the employment market. The ERB has appointed about 90 Training Bodies with around 400 training centres across the territory to provide training courses and services. The ERB offers around 700 training courses across nearly 30 industries.

The ERB provides a courses under the "Manpower Development Scheme". These include full-time "Placement-tied Courses" for the unemployed; part-time "Generic Skills Training Courses"; "Skills Upgrading Scheme Plus" courses with skills enhancement training for employees; and courses for special groups such as "Youth Training Programme" for non-engaged young people, courses for persons with disabilities and persons recovered from work injuries, courses for rehabilitated offenders, courses conducted in English for ethnic minorities and courses for new arrivals.

The ERB has developed professional certification courses, including industry certification courses, public examination preparation courses, and National Occupational Qualification Certificate-related courses to help trainees move up their professional ladder. The majority of ERB courses are at QF Levels One to Four.

The ERB vision is “to provide a flexible, quality and resilient labour force for the knowledge-based economy of Hong Kong”. Its mission is “to develop training courses and services in response to the changes in the employment market, enhance the quality of our labour force and foster upward mobility in the society”.

The Executive Director indicates that in 2018-19, ERB plans to provide 130,000 training places. There are about 52,000 places for placement-tied courses, and 78,000 for skills upgrading and generic skills training. There are 40,000 training places reserved to enable ERB to react to employment market changes. One area identified as source of future employment is healthcare for the elderly where there is also potential to develop courses in English for minorities.

The ERB has Industry Consultative Networks (ICNs) of different industries in order to strengthen partnerships and communication with strategic partners. Representatives of employer associations, trade unions and professional bodies, are invited to join. ICN members provide advice on employment market demand, skills requirements and training needs of their industries. They also advise on the design of courses and development of new courses to ensure that the training caters timely for market changes.

Source: <https://www.erb.org/home/erb/en/>

## **4.4 Special Areas of Lifelong Learning for Employability**

### **4.4.1 Special Educational Needs**

Social Welfare Department oversees the 28 Integrated Vocational Rehabilitation Centres that provide training to people with disabilities and special needs. In theory there are 4,700 places available for training but this is insufficient and there can be a long wait for a place. These are largely charitable institutes with the exception of the Shine Skills Centre which is part of the VTC.

There are two government-funded schools dedicated to helping special-needs students find their career path. NGOs such as LoveXpress and the Rock Foundation also provide training. They design and provide courses that can help to establish career paths in areas such as hospitality and catering.

The Work Orientation and Placement Scheme (WOPS) administered by the Selective Placement Division of the Labour Department encourages employers to offer employment and work orientation to people with disabilities. In addition to providing employment, provision of job coaching by a mentor is required as part

of the conditions for receiving a subsidy. An employer is required to appoint an experienced staff as a mentor for the employee with disabilities to coach him/her on relevant job skills, as well as to assist him/her to adapt to the new job environment and integrate with co-workers.

Selective Placement Division will advise job seekers with disabilities to take part in a short-term pre-employment training programme under WOPS enhanced employment prospects. The training programme equips people with interview techniques and interpersonal and communication skills etc.

#### 4.4.2 Languages

Language learning can fall into either the formal learning category - in the sense that the language is necessary for employment - or the informal category if learning is for recreational purposes.

Many universities and tertiary institutes provide language tuition usually leading to a recognized qualification. There are many language schools in Hong Kong. These need to be registered with Education Bureau. Many languages are available. For example, the Hong Kong Institute of Languages offers courses in English, French, German, Spanish, Cantonese, Mandarin, and Japanese.

National education and cultural institutions offer language studies for example the British Council, Alliance Française, and the Goethe Institut.

The Central Library offers access to language self-learning facilities to the public.

#### *Workplace English Campaign*

The Workplace English Campaign (WEC) was launched by the Hong Kong Government with the aims of heightening public awareness of the importance of having a good command of English in a workplace environment and to improve the knowledge of English among the working population in Hong Kong. It is steered by the Standing Committee on Language Education and Research (SCOLAR).

#### 4.4.3 Minority Assistance and Education

There are a number of organizations that provide assistance through short programmes to domestic helpers. For example, The YWCA runs the Helpers' Training Academy which provides instruction in kitchen management, cooking, self enhancement, money management, and first aid and child CPR. The YMCA provides supportive services to new arrivals to Hong Kong to assist with multicultural integration. These cross over with non-employment related training.

Enrich is a charity specialising in providing practical financial literacy training, business development training and communication courses to migrant workers and ethnic minority women.



Most government assistance is in the form of advice and is generally targeted at education from kindergarten to secondary. The tertiary institutes (UGC and self-funded) generally conduct many courses in English medium so if minority school leavers can attain a place they have a good opportunity to maximize their potential.

Vocational education (through the VTC) for non-Chinese speakers is limited. Courses offered under Ethnic Minority Project (in English) are: business and office operations, coffee shop operations, electronic & computer network installation, and vehicle and motorcycle servicing.

#### 4.4.4 Education in Correctional Facilities

Education classes for general, commercial and computer related subjects are provided for young offenders. These aim to help offenders re-integrate into society on their discharge. Adult offenders receive assistance for voluntary self-studies.

Formal day classes are run in young offender institutions and are conducted by qualified teachers. General subjects, computer applications and commercial subjects are available. Young offenders are encouraged to study for external examinations such as the HKDSE. Adult prisoners are encouraged to participate in self-study courses or distance learning programmes. Increasing numbers of inmates have been enrolled in tertiary education in recent years.

There are a number of organizations that support offender education and rehabilitation:

- Prisoners' Education Trust Fund
- Prisoners' Education Subsidy Fund
- Care of Rehabilitated Offenders Association Foundation
- St. John's Cathedral Education Fund
- The Chinese Manufacturers' Association Education Development Fund for Persons in Custody
- The Chinese General Chamber of Commerce Education Funding Programme
- Tung Sin Education Fund

Source: [www.csd.gov.hk/english/reh/reh\\_overview/reh\\_overview\\_education/reh\\_edu.shtml](http://www.csd.gov.hk/english/reh/reh_overview/reh_overview_education/reh_edu.shtml)

## **5 Lifelong Learning for Well-being**

In the UIL context lifelong learning for well-being and health as reported in the GRALE Reports relates to provision of information and learning about public and personal health.

In the Hong Kong context the term "well-being" is interpreted to refer to lifelong learning undertaken not just for the purpose of physical health, but to include a more general sense of well-being such as keeping active both physically and mentally through pursuit of hobbies, personal enlightenment, spirituality and learning for a general sense of fulfilment.

There are blurred distinctions within the UIL classification between learning activities to improve well-being and those that are "social" activities. This report reports activities that are "mind or body-improving" under the well-being category but these could equally be listed under "social activities" as the distinction is a personal one depending on the motivation of the individual learner.

### **5.1 Lifelong Learning Institutions**

Institutions that offer access to lifelong learning include: libraries, district offices, schools, tertiary institutes, government departments, community centres, religious establishments, homes for the elderly (and day centres), museums, culture and arts centres, NGOs, private clubs and studies, and online information.

### **5.2 Public Information**

There is a continuing programme of public education through television broadcasts and increasingly through other media, for example the "Knowledge for All" television programme. The main organisation for the provision of public information is the Information Services Department of the Government. There are ongoing campaigns covering: anti-drugs, clean Hong Kong, education services, family, health and hygiene, home safety and road safety. The full list of broadcasts is available at [https://www.isd.gov.hk/eng/api\\_more.htm](https://www.isd.gov.hk/eng/api_more.htm).

### **5.3 General Well-being**

The YWCA Centre of Learning and Life Enhancement runs programmes on well-being such as "Bringing Wellness and Satisfaction to Your Life" and "Navigating Your Parenting Path". Many programmes in well-being are available and are best searched online.

### **5.4 Elder Academies**

In Hong Kong elder learning programmes first emerged in the late 1980s with most of them organised by non-governmental organisations. The Labour and

Welfare Bureau and the Elderly Commission launched a primary and secondary school-based Elder Academy Scheme in early 2007.

The mission of the Elder Academies is to inspire elders to pursue learning and foster a sense of worthiness. They offer opportunities for elders to pursue studies and participate in activities that foster their general well-being, both physically and mentally. Generally, there is no academic requirement for enrolment in the self-access learning programmes for elders.

Many elders look for a chance to study in universities while some others hope to enrol in academic and in-depth learning programmes. The Labour and Welfare Bureau and the Elderly Commission expanded the Elder Academy Scheme to tertiary level. There are about 130 elder academies in primary, secondary and tertiary institutions throughout the territory, with six universities involved.

According to the Elder Academy Development Foundation (EADF) set up in 2009, there are a total number of over 10,000 places for elder learning each year.

## **5.5 Niche Areas**

### **5.5.1 Languages**

There are courses available from the universities, tertiary institutes or from many small schools, individual tutors and libraries. National education and cultural institutions offer language studies for example the British Council, Alliance Française, and the Goethe Institut. Other language schools and providers are too numerous to list and the information would become outdated quickly. For up to date information schools and courses can be found online.

### **5.5.2 Arts and Crafts**

There are many small studios and individuals offering courses and tutoring in arts and crafts such as painting, pottery, calligraphy etc. The Hong Kong Art School offers a range of courses from those with degree and diploma level qualifications through to retreats and short courses for personal fulfilment and recreation.

There are many courses available in niche crafts such as perfume making, leather working, jewellery making etc.

### **5.5.3 Music and Dance**

The Leisure and Cultural Services Department (LCSD) encourages public participation in music and dance. The Music Office focuses on promoting knowledge and appreciation of music in the community. The Office provides training to more than 8,000 people each year through the Instrumental Music Training Scheme, Ensemble Training and Outreach Music Interest Courses. The

first two schemes are intended for youth up to the age of ~23 whereas the latter is available to all ages.

There are a number of dance and music schools, as well as individuals offering tuition. These are best search for online.

#### 5.5.4 Literature and Culture

The Central Library offers extension literary activities in the areas of: Chinese Poetry Writing, Chinese Classics, Creative Writing Workshops and talks on many literary and local cultural topics. The British Council organizes *ad hoc* talks by visiting authors on creative writing. There are creative writing courses available at some of the universities.

#### 5.5.5 Food and Beverage

There are many “cooking schools” in Hong Kong covering different specialities. For example, The YWCA Centre of Learning and Life Enhancement runs programmes on cookery. Towngas has a cooking centre in Causeway Bay offering a number of courses in different styles. Cooking schools are best searched for online.

There are a number of wine education courses and activities which are run for profit and for a learning and social activity by participants. The YMCA organizes courses on wine appreciation. It is possible to receive training to a professionally recognized level with Wine & Spirit Education Trust (WSET) qualifications – for example through the Hong Kong Management Association. (Note: this qualification is not recognized by HKCAAVQ although some other wine related courses are).

Wine courses are best searched for online to find what suits particular requirements.

#### 5.5.6 Religion, Spirituality and Mindfulness

There are many organizations that provide support and teaching in these areas. As well as organized religion there are many centres that offer classes in meditation, yoga and various relaxation techniques. These are best searched online. For example, the Hong Kong Institute of Spiritual Awareness (formed in 2018), Hong Kong New Age Centre, the EdUHK Centre for Religious and Spirituality Education, the Garden Gathering and many other organizations and events.

#### 5.5.7 Sports and Leisure

Sports may be considered a part of lifelong learning. However, this area is so broad that it is not covered within this report. Many sports and recreational

activities require initial training and continued learning, for example: recreational flying, scuba diving, piloting motor boats, sports officiating and marshalling at events.

## **6 Lifelong Learning for Social, Civic and Community life**

### **6.1 Lifelong Learning Institutions**

These are the same as provided in section 5.1.

### **6.2 Lifelong Learning for Social Reasons**

This overlaps with lifelong learning for well-being. For example, it is known that some elder students join programmes for the social interaction of meeting people of similar age and background rather than specifically to learn. Participating in other learning, such as dance or art also may be motivated by desire for social interaction and to meet people, rather than learning.

### **6.3 Public Information**

In addition to the information listed in section 5.2, the Information Services Department provides civic information on: basic law and constitutional development, fight crime, fire prevention, home safety and building management, Hong Kong SAR 20th anniversary, information technology, intellectual property rights, labour relations, employment and occupational safety, volunteering and other miscellaneous information. The full list of broadcasts is available at:

[https://www.isd.gov.hk/eng/api\\_more.htm](https://www.isd.gov.hk/eng/api_more.htm).

### **6.4 Civil Auxiliary and Voluntary Services**

There are opportunities for civic and community service through volunteer work for the Civil Aid Service (CAS). This has over 3,700 members and the Service's primary duty is to augment the regular emergency services in the event of natural disasters and other emergencies. It provides community services such as crowd management for community activities, fire-prevention patrols in country parks, and provision of training on mountain hiking safety to the public.

The CAS also runs the CAS Cadet Corps which is a youth service with more than 4,000 young people aged 12 to 17. Through various disciplinary and vocational training as well as community services, Corps members are provided with opportunities to develop their leadership, to exploit their latent talents, and to learn about discipline and civic responsibilities.

The Hong Kong Auxiliary Police Force (HKAPF) is a volunteer service that dates back to 1914. The HKAPF provides support as determined by the Commissioner

of Police in accordance with prevailing operational priorities. Its organization and command are integrated with the regular force. The roles of the HKAPF are: the protection of Key Points; providing staff for Command and Control Centres; providing staff for Station Defence; and the protection of Consular Premises. The HKAPF is also available to assist at times of natural disaster or civil emergencies; and support to the regular Force in crowd management during major public events.

## **6.5 Other Volunteer Services**

There is website dedicated to civic and community volunteer programmes that people can join. This is: [www.volunteering-hk.org](http://www.volunteering-hk.org). In addition to public service there are opportunities with many NGOs working in areas such as the environment, minorities, refugees, special needs, young offenders, women's welfare etc.

# **7 Financial provision for Lifelong Learning (post-secondary school)**

## **7.1 Working Family and Student Financial Assistance Agency (WFSFAA)**

The WFSFAA provides financial assistance to needy families in Hong Kong, supporting children and youth receiving education and encouraging working families to stay in active employment for self-reliance and to ensure that no students in Hong Kong are denied access to education because of lack of means.

The Student Finance Office of the WFSFAA offers a number of schemes for student finance. These are:

### **7.1.1 Tertiary Student Finance Scheme - Publicly-funded Programmes (TSFS)**

This is a means tested fund for students taking exclusively UGC-funded or publicly-funded full-time programmes. A grant is provided to cover tuition costs and a loan is granted to cover living expenses. The amount of tuition subsidy provided is means tested and depends on parental income, assets and allowances for dependants. As an indicator (2018), students whose parental income is greater than HK\$300K per annum or whose total assets exceed HK\$2.2M will not be eligible for a grant. A self-calculator for eligibility is available at:

[https://e-link.wfsfaa.gov.hk/EBILLPRD/jsp\\_public/vas/vas0101.jsp?APPL\\_TYPE=TSFS&WINDOW\\_ID=WINDOW\\_1535682538066](https://e-link.wfsfaa.gov.hk/EBILLPRD/jsp_public/vas/vas0101.jsp?APPL_TYPE=TSFS&WINDOW_ID=WINDOW_1535682538066)

### 7.1.2 Non-Means-Tested Loan Scheme for Full-time Tertiary Students (NLSFT)

This is a non-means-tested loan scheme for students taking programmes covered under the Tertiary Student Finance Scheme - Publicly-funded Programmes (TSFS). This is used to top-up the tuition subsidy and for subsistence/travel.

### 7.1.3 Financial Assistance Scheme for Post-secondary Students (FASP)

This is a means-tested scheme for students taking up full-time, locally-accredited, self-financing post-secondary education programmes.

### 7.1.4 Non-means-tested Loan Scheme for Post-secondary Students (NLSPS)

This is a non-means tested loan scheme for students pursuing programmes covered under Financial Assistance Scheme for Post-secondary Students (FASP).

### 7.1.5 Extended Non-Means-Tested Loan Scheme (ENLS)

This is a non-means tested loan scheme for students pursuing specific post-secondary / continuing and professional education courses provided in Hong Kong.

### 7.1.6 Student Travel Subsidy for Tertiary or Post-secondary Students

This is a means tested scheme for successful applicants of TSFS and FASP, attending full-time day courses up to first degree level and reside beyond 10 minutes walking distance from student's normal place of study and travel to school by public transportation.

### 7.1.7 Community Care Fund Assistance Programmes

This is a means-tested scheme for full-time students to cover:

- provision of hostel subsidy for needy undergraduate students;
- increasing the academic expenses grant under the Financial Assistance Scheme for Post-secondary Students (FASP); and
- enhancing the academic expenses grant for students with special educational needs and financial needs pursuing post-secondary programmes.

### 7.1.8 Continuing Education Fund

The Continuing Education Fund (CEF) was set up in June 2002 by the Government to assist people in continuous education and training programmes. The aim is to help people pursue continuing education, thereby facilitating Hong Kong's transition to a knowledge-based economy and adaptation to an

increasingly globalised economy. The CEF offers Hong Kong citizens aged between 18 and 65 a maximum subsidy of HK\$10,000 for the entire lifetime. They can apply for reimbursement of 80% of the fees of any CEF registered course, subject to the maximum subsidy of HK\$10,000 (whichever is the less), on successful completion of the course. The fees for more than one registered course may be reimbursed, subject to the maximum subsidy per applicant not being exceeded. Each applicant can only submit a maximum of four claims for reimbursement within a four-year period from the date he or she opened a CEF account.

On course variety, eligible applicants may choose from some 7,900 courses currently registered under CEF according to their interests and needs. At present, training and education courses under eight specified domains can be registered as CEF courses by application following a formal accreditation exercise conducted by the HKCAAVQ. Only courses from economic sectors with high growth potential and manpower requirement or skill domains where local workforce may be deficient are covered by the CEF.

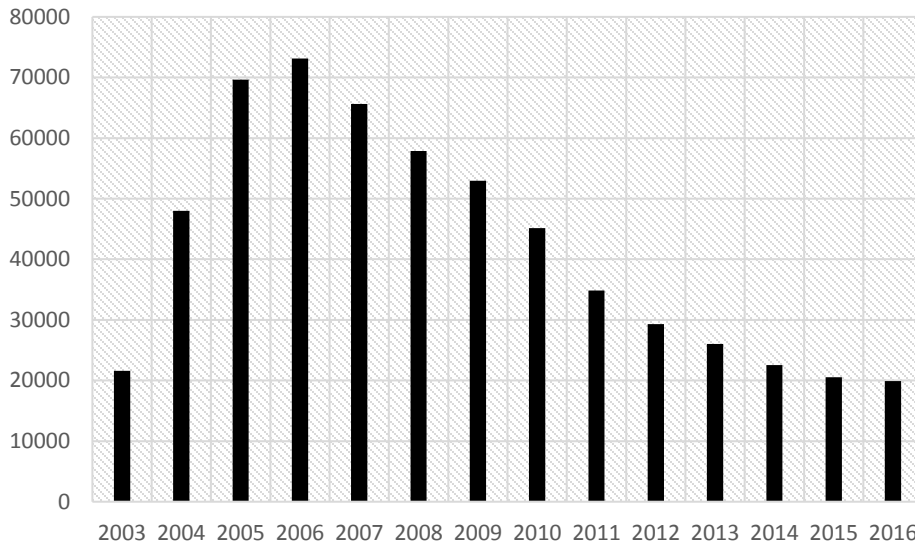
In addition to HKCAAVQ-accredited courses, courses designed in accordance with the Specification of Competency Standards (SCS) drawn up by the respective Industry Training Advisory Committees under the Qualifications Framework of the Education Bureau and registered as SCS-based courses under the Qualifications Register may also apply for registration under CEF.

At its launch in 2002, CEF only benefited those who did not possess a university degree. Subsequently, the former Education and Manpower Bureau relaxed the eligibility criteria to include degree holders with effect from 1 September 2003. Reflecting this, the number of claims for CEF reimbursement rose from 21 570 in Fiscal Year 2003 and reached a maximum of 73,138 in FY2006. However, the number has declined since then to 19,912 in FY2016 (Figure 8). The falling number of claims might reflect the declining real value of the CEF subsidy and the narrow scope of the CEF registered courses.

The eight specified domains are (a) Business Services; (b) Financial Services; (c) Logistics; (d) Tourism; (e) Creative Industries; (f) Design; (g) Languages; and (h) Interpersonal and Intrapersonal Skills for the Workplace.



Figure 8 Number of claims for CEF reimbursement, FY2003-FY2016



### 7.1.9 Financial Assistance Scheme for Designated Evening Adult Education Courses

The Financial Assistance Scheme for Designated Evening Adult Education Courses (FAEAEC) provides financial assistance in the form of tuition fee reimbursement to eligible students. Students can obtain 30%, 50% or 100% reimbursement of the tuition fees paid if they fulfil the prescribed criteria after the end of each school term.

### 7.1.10 Diploma Yi Jin

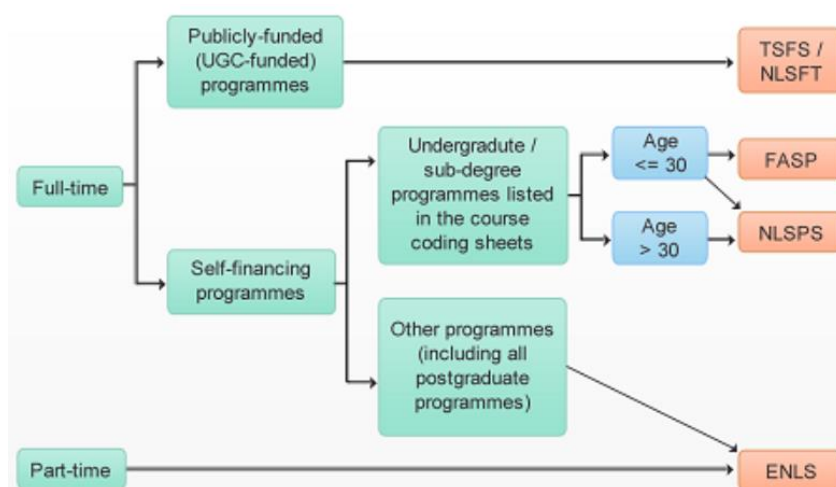
The Scheme provides financial assistance in the form of tuition fee reimbursement to eligible students. Full-time or Part-time Diploma Yi Jin (DYJ) students can obtain 30%, 50% or 100% reimbursement of the tuition fees paid if they fulfil the prescribed eligibility criteria after the end of each school year.

In the 2018/19 school year, full-time DYJ students who pass the means test administered by the Student Finance Office (SFO) and are assessed as eligible for full or half level of assistance will also be disbursed with the flat-rate academic expense grant automatically. Separate application is not required. The amount of flat-rate academic expense grant is on par with the flat-rate grant receivable by primary and secondary students under the School Textbook Assistance Scheme.

### 7.1.11 Selecting Appropriate WFSFAA Funding

Figure 9 shows the decision making process for selecting the appropriate source of finance.

Figure 9 Sources of finance under the WFSFAA



Further details of these schemes are available from:

<https://www.wfsfaa.gov.hk/sfo/en/postsecondary/fasp/overview.htm>

## 7.2 Non-means-tested Subsidy Scheme for Self-financing Undergraduate Studies in Hong Kong

From the 2017/18 academic year the Government provides a non-means tested annual subsidy of \$30,000 for eligible students pursuing fulltime locally accredited local and non-local self-financing undergraduate (including top-up degree) programmes with the exception of those with places already supported under the Study Subsidy Scheme for Designated Professions/Sectors (SSSDP). This was increased to \$30,800 for the 2018/19 academic year.

Under the Non-means-tested Subsidy Scheme for Self-financing Undergraduate Studies in Hong Kong (NMTSS), a non-means-tested annual subsidy will be provided to Hong Kong students who have attained:

- “3322” in the Hong Kong Diploma for Secondary Education Examination (i.e. level 3 for Chinese Language and English Language and level 2 for Mathematics Compulsory Part and Liberal Studies) when they are enrolled in eligible self-financing first-year-first-degree programmes; or
- sub-degree qualifications (i.e. after completing relevant locally-accredited Associate Degree or Higher Diploma programmes) when they are enrolled in eligible self-financing top-up degree programmes.

New and continuing students meeting the criteria are eligible for the subsidy, which is disbursed to the participating institutions based on the enrolment of eligible students. Eligible students enrolling in the relevant programmes will pay a tuition fee after the subsidy.

Government also provides a non-means tested annual subsidy of \$5,000 for eligible students pursuing eligible undergraduate (including top-up degree) programmes in the Mainland.

It should be noted that this scheme is not universally lauded. At the time of approval of the funding it was noted that students applying for, or already on, most programmes offered by the 8 UGC funded institutes are not be eligible for the subsidy. This situation could lead to students choosing programmes based on affordability rather than maximising their learning potential (SCMP, Aug 2017).

### **7.3 The Study Subsidy Scheme for Designated Professions**

In the 2015/16 academic year, Government launched the SSSDP on a pilot basis for three cohorts, subsidizing approximately 1,000 students per cohort. This was for students undertaking designated self-financing undergraduate programmes for nurturing talent that meets Hong Kong's social and economic needs.

The Scheme aims to achieve the following objectives:

- to increase the supply of subsidised undergraduate places by leveraging the supply of the self-financing sector;
- to nurture talent in support of specific industries with keen demand for human resources;
- to encourage the self-financing education sector to offer programmes in selected disciplines that meet Hong Kong's social and economic needs by providing targeted financial support; and
- to support the healthy and sustainable development of the self-financing post-secondary education sector to complement the UGC-funded sector in broadening and diversifying study opportunities.

The Government regularized the SSSDP starting from the 2018/19 academic year and increased the number of subsidised places to about 3,000 per cohort. It is expected that about 13,000 students will benefit from the scheme each academic year. The 37 designated programmes under the scheme in the 2018/19 academic year fall under 10 industries with manpower demand. These are: healthcare, architecture and engineering, testing and certification, creative industries, computer science, financial technology, insurance, logistics, tourism and hospitality, and sports and recreation.

SSSDP adopts a two-tier unit subsidy arrangement in which an annual subsidy of up to \$40,000 is provided to programmes which are not laboratory-based and an annual subsidy of up to \$70,000 is provided to laboratory-based programmes.

It should be noted that it is the "programme" that receives the subsidy and the understanding is that the tuition fees paid by the students should reflect the subsidy under SSSDP.

In the 2018 Policy Address Government committed to increase subsidies for local students pursuing post-secondary education. The Government increased support for self-financing sub-degree programmes to nurture talent to meet development needs. From the 2019/20 academic year, about 2,000 students per cohort will be subsidised to undertake designated programmes through the SSSDP. Current students of the designated programmes will also receive the subsidy. It is expected that about 4 000 students will benefit in each academic year. This initiative will incur \$120 million additional recurrent expenditure each year.

Details of the participating institutions and the eligible programmes can be found at: <https://www.cspe.edu.hk/en/sssdp/participating-institutions.html>

#### **7.4 Pilot Subsidy Scheme for Students of Professional Part-time Programmes**

In the 2016 budget, the Government committed \$200 million to provide tuition fee subsidies for students on designated professional part-time programmes of the VTC. The VTC implemented the Pilot Subsidy Scheme for Students of Professional Part-time Programmes starting in the 2016/17 academic year. This Pilot Scheme covered 50 self-financing part-time programmes offered by the VTC in the field of construction and engineering. The Pilot Scheme was launched to encourage working adults to pursue higher qualifications which would enhance their upward mobility while promoting professionalism in the construction services and engineering industries.

Under the Scheme, successful applicants are refunded 60% of the tuition fees of eligible programmes, to a maximum of \$45,000 per person.

In the 2018 Policy Address government wished to encourage working adults in designated industries to pursue higher qualifications, so continued to provide a tuition fee subsidy for three years to a total of 5,600 students admitted to designated professional part-time programmes offered by the VTC.

#### **7.5 Tuition Waiver for Local Research Postgraduate (RPg) Students**

Starting from the 2018/19 academic year, the Government provided a waiver for tuition fees for all local students enrolled in UGC-funded RPg programmes at any of the eight UGC funded universities. The objective of the scheme is to encourage local students to join RPg programmes so as to build up a pool of local research talent. The scheme is non-means-tested and covers the entire tuition fee. There is no cap on the number of recipients. To prevent double benefit, students will not be eligible if the tuition fee covered by any other schemes but if the tuition fee has been partially waived, students are still eligible for the tuition waiver.

Scholarships, awards or stipends that do not cover tuition fees will not affect the waiver.

## **7.6 Hong Kong PhD Fellowship Scheme**

The Hong Kong PhD Fellowship Scheme (HKPFS) scheme was established in 2009 by the Research Grants Council (RGC). The objective is to attract the best students in the world to Hong Kong's universities.

The scheme is for people seeking admission as new full time PhD students in any UGC funded university irrespective of their country of origin, prior work experience and ethnic background. Applicants must demonstrate outstanding qualities of academic performance, research ability/potential, communication and interpersonal skills, and leadership abilities. The Fellowship provides an annual stipend of HK\$301,200 (approximately US\$38,600) and a conference and research-related travel allowance of HK\$12,600 (approximately US\$1,600) per year for each awardee for a period up to three years. 250 PhD Fellowships available in the 2019/20 academic year.

## **7.7 ERB Course Subsidies**

Placement-tied courses targeted at the unemployed are offered free of any charge. Non-placement-tied courses are fee charging and fees payable are based on the amounts stipulated at the time of application. Applicants with no or low income (monthly income at or below \$11,000) can apply for course fee waiver. Applicants with monthly income higher than \$11,000 can apply for course fee subsidies. "Highly Subsidised Fee" and "Normal Subsidised Fee" of individual courses will be payable respectively by applicants with monthly income between \$11,001 and \$19,500 and those with monthly income above \$19,500.

## **7.8 Elder Academy (EA)**

Each approved Elder Academy in a primary or secondary school is provided with funding of up to \$122,000 (2017) for implementing a three-year programme. Elder Academies having completed the first three-year programme may submit applications for funding up to \$60,000 for running a two-year programme. There are no fixed fees across the different academies, each can choose how much to charge the elder students. The Education University of Hong Kong's Elder Academy offers subsidised courses to elder students. There is also the Elder Academy Development Fund to support organisations or institutions to initiate learning projects, programmes and activities for later life learning.

## **7.9 The Work Orientation and Placement Scheme**

Under the Work Orientation and Placement Scheme (WOPS), in addition to providing employment for people with disabilities, provision of job coaching by mentor is required as part of the conditions for an employer receiving a subsidy.

An employer is required to appoint an experienced staff as a mentor of the employee with disabilities to coach him/her on relevant job skills, as well as to assist him/her to adapt to the new job environment and integrate with co-workers. A mentor who has successfully assisted such an employee to continue with employment after the first two months will be granted a Cash Award of \$1,000.

The pre-employment training programme under WOPS equips people with interview techniques and interpersonal and communication skills etc. On completion of the pre-employment training, a training allowance of \$80 per day of training is provided.

### **7.10 The Hong Kong Arts Development Council Awards**

The Hong Kong Arts Development Council (HKADC) offers local arts practitioners opportunities to train, compete, observe and undertake work placements and overseas exchanges through a variety of programmes, with the objectives of cultivating local arts talents and raising the professional standards of Hong Kong's arts and culture sector.

#### *Hong Kong Scholarship on the Clore Leadership Programme*

To support arts practitioners with leadership potential to undertake a series of tailor-made leadership training programmes provided by the Clore Leadership Programme in the United Kingdom to strengthen their leadership skills and broaden their international exposure.

#### *Overseas and Local Arts Administration Scholarships*

With the funding support from the Home Affairs Bureau, HKADC launched Local and Overseas Arts Administration Scholarships to support local promising arts administrators to further their studies in Hong Kong and abroad in order to strengthen their professionalism.

#### *Overseas Short-term Internship Scheme*

HKADC launched internship and training programmes to outstanding local arts administrators to foster their professional growth and to facilitate the long-term development of arts and culture in Hong Kong.

#### *Overseas Training/Research Programme for Leaders from Local Arts Groups on Future Arts Development in Hong Kong*

No further information is available on scheme.

## 7.11 Charitable Funding/Awards

### 7.11.1 Sir Edward Youde Memorial Fund

The Sir Edward Youde Memorial Fund was established in 1987 to commemorate the former late Governor Sir Edward Youde. The purpose of the Fund is to provide for and encourage the education of, or research by the people of Hong Kong. It provides grants or loans (with or without interest) for the development of education, learning or research in or out of Hong Kong.

### 7.11.2 Grantham Scholarships Fund

The Grantham Scholarships Fund was raised by the people of Hong Kong to commemorate the governorship of Sir Alexander Grantham. The Fund was established by the Grantham Scholarships Fund Ordinance (Chapter 1076). It is managed by a statutory management committee of which the Secretary for Home Affairs is the ex-officio Chairman. The Fund provides scholarships and maintenance grants for students in secondary schools, technical schools and institutions of higher education in Hong Kong.

### 7.11.3 Li Po Chun Charitable Trust Fund

This Fund was founded by the late Mr. LI Po-chun under the provisions of the Li Po Chun Charitable Trust Fund Ordinance (Cap. 1110). The Secretary for Home Affairs is the Chairman of the statutory committee which administers the Fund.

Approximately half of the income of the Fund is used for scholarships, including overseas postgraduate scholarships, awards to students attending local tertiary institutions, the United World Colleges and Secondary 4 or above at one of four Anglo-Chinese secondary schools (namely, King's College, Queen's College, Queen Elizabeth School and Belilios Public School). The balance of the income is paid to the Director for Social Welfare for the relief of distress cases in which no adequate assistance is available from other sources.

### 7.11.4 Sir Robert Black Trust Fund

This Fund was created with an initial donation of \$1 million by Sir Shiu-kin Tang to commemorate Sir Robert Black's governorship. The Fund is managed by a Statutory Committee set up under the Sir Robert Black Trust Fund Ordinance (Cap. 1101).

The Fund aims to provide -

Type I grants: to social welfare or youth organisations.

Type II awards: to individuals for postgraduate studies or other training programmes, local or overseas.

#### 7.11.5 The Hong Kong Jockey Club Music and Dance Fund

The Hong Kong Jockey Club Music and Dance Fund (the Fund) was set up in 1980 with a donation of \$10 million from The Hong Kong Jockey Club Charities Trust (the Trust) for the promotion and development of music and dance. It is a non-statutory trust fund administered by a Board of Trustees.

The objectives of the Fund are to promote training and education in music and dance in Hong Kong by way of conferring scholarships to enable candidates of outstanding calibre to pursue post-graduate studies in music or dance at degree-awarding tertiary institutions in Hong Kong; or pursue professional training in music or dance at world-renowned institutions or to undertake less formal studies, projects or creative work outside Hong Kong.

## 8 Close

In the wake of the aging population and the need for Hong Kong to thrive as a knowledge-based society, lifelong learning is becoming ever more important. It requires concerted efforts from all sectors, including the government, commercial, social, educational, and private businesses to develop, implement and improve policy, provision and practice for Hong Kong to achieve lifelong learning for all and for all ages.

This report is intended to describe factually the status of lifelong learning in Hong Kong as at September 2018. It is not intended to provide complete lists of institutes, courses, professional bodies or specialist areas of lifelong learning, but it looks to cover the key areas following the basic categories adopted by the UIL.

The information is largely sourced online and is in the public domain. The authors would welcome feedback and additional information from readers for inclusion in future updates.