



United Nations
Educational, Scientific and
Cultural Organization



International Institute
for Educational Planning

Confronting the shadow education system

What government policies for what private tutoring?

Mark Bray



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Contents

Acknowledgements	6
List of abbreviations	7
List of tables	9
List of boxes	10
1. Introduction	11
The metaphor of the shadow	13
Structure of the book	14
2. Diagnosis	17
Scale, intensity and mode	17
Economic, social and educational impact	30
Three case studies	47
3. Policy responses	71
Mapping contexts, objectives and structures	71
Addressing the demand for tutoring	75
Addressing the supply of tutoring	79
Harnessing the market	84
Improving regulatory structures	87
4. Monitoring and evaluation	93
National and local feedback loops	93
International benchmarking	97
5. Conclusions	101
Noting the trends	101
Learning from the shadow	104
References	109
Index	127

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List of abbreviations

ADEA	Association for the Development of Education in Africa
CLAP	Community Learning Assistance Project
CPE	Certificate of Primary Education
CPS	Chicago Public Schools
CSAT	College Scholastic Ability Test
DST	Department of Science and Technology
GCSE	General Certificate of Secondary Education
GDP	Gross Domestic Product
GNP	Gross National Product
GPA	Grade Point Average
IEA	International Association for the Evaluation of Educational Achievement
IIEP	International Institute for Educational Planning
INRP	Institut national de recherche pédagogique
ICT	Information and communication technology
HCEC	Haut Conseil à l'évaluation de l'école
MENDAKI	Council on Education for Malay/Muslim Children
NCLB	No Child Left Behind
NGO	non-governmental organization
OECD	Organisation for Economic Co-operation and Development
OSI	Open Society Institute
PISA	Programme for International Student Assessment
QTS	Qualified Teacher Status
SACMEQ	Southern and Eastern Africa Consortium for Monitoring Educational Quality
SES	Socio-economic status
SINDA	Singapore Indian Development Association
SPH	Special Purpose High [School]
SPL	School Pilot Leader

List of abbreviations

TIMSS	Third International Mathematics and Science Study/ Trends in International Mathematics and Science Study
UNESCO	United Nations Educational Scientific and Cultural Organization
UNICEF	United Nations Children's Fund
USA	United States of America
ZEP	Zone d'éducation prioritaire

List of tables

Table 1.	Cross-national indicators of private tutoring	18
Table 2.	The scale of private tutoring in selected countries of Eastern Europe and Asia	20
Table 3.	Percentages of Grade 6 pupils receiving supplementary tutoring in Eastern and Southern Africa, 1995 and 2000	21
Table 4.	Percentages of students receiving private tutoring in four states of India, by grade	21
Table 5.	Intensity of tutoring among Grade 12 students in four schools, Portugal, 2005-2006	25
Table 6.	Percentages of students receiving tutoring in different numbers of subjects, India, 2005	26
Table 7.	Percentages of Indian higher secondary students in different subject streams receiving tutoring, 2005	26
Table 8.	Rural and urban differences in consumption of private tutoring in Eastern Europe and Asia (%)	37
Table 9.	Percentages of pupils receiving private tutoring at lower secondary level in rural and urban areas of four Indian states	37
Table 10.	Impact of private tutoring on mainstream education	45
Table 11.	Percentages of pupils receiving private tutoring, Korea, 1980-2007	53
Table 12.	Major tutoring enterprises, France	68
Table 13.	A system for classifying private tutoring	73
Table 14.	Models for tutoring considered in England's 'Making Good Progress' scheme	82
Table 15.	Legal frameworks regulating private tutoring in six countries of Europe and Asia	87
Table 16.	Evaluation methodology for the 'Making Good Progress' pilot	96

List of boxes

Box 1.	Classifying patterns of private tutoring	24
Box 2.	Making evaluative judgements	30
Box 3.	Managing the pressures	54
Box 4.	Why is tutoring in Mauritius so strong?	64
Box 5.	The financial arithmetic of tutoring in France	69
Box 6.	Distinguishing between types of <i>juku</i> in Japan	74
Box 7.	A master tutor in Egypt	78
Box 8.	Monopoly + Discretion – Accountability	80

1. Introduction

Around the world, the principal focus of educational planners and policymakers is on formal systems of education ranging from kindergartens through primary and secondary schooling to the university sector. The institutions which comprise these education systems consume considerable resources, and have major social and economic roles in the societies they serve.

Parallel to these mainstream education systems, and increasingly evident in a wide range of settings, are what this book refers to as shadow education systems of private supplementary tutoring. The shadow systems have received much less attention, even though they also have major social and economic implications. This book argues that shadow education deserves much more attention from educational planners and policymakers. In some parts of the world, especially in Japan and other parts of East Asia, shadow education has long been very visible. Recent years have brought considerable growth elsewhere, together with evolution in the forms and impact of tutoring. Moreover, tutoring has increasingly been provided in systems rather than just as a discrete informal activity. Tutoring enterprises may have links with each other, and some even operate cross-nationally.

In 1999, UNESCO's International Institute for Educational Planning (IIEP) published the first significant cross-national study of private tutoring, prepared by the present author (Bray, 1999*a*). That book received considerable attention in the academic and professional literature. At the same time, the book highlighted the need for further investigation of issues (p. 87).

In the period following the publication of the 1999 work, the topic did indeed receive further investigation. IIEP published a second book in its series on ethics and corruption (Bray, 2003); many other writers addressed the theme, including some listed in the references of the present volume; and the topic, including specific references to the IIEP work, appeared in policy-oriented documents by a number of multilateral agencies and non-governmental organisations (e.g. World Bank, 2004, 2005; OECD, 2006*a*; ADEA, 2008; Open Society Institute, 2008; UNESCO, 2004, 2007, 2008; UNICEF, 2007; Transparency International, 2009). The growth of such analysis reflected increased awareness of the

importance of the phenomenon, which itself partly reflected expansion in the prevalence of private tutoring.

This increased attention in turn raised questions about how policymakers and planners might respond to the existence and expansion of private tutoring. This matter had been addressed in the 1999 book, which noted (Bray, 1999a, pp. 74-77) that patterns around the world ranged from ignoring the phenomenon to endeavouring to prohibit it. The book also noted that different types of response might be appropriate to different settings and different points in time, and asserted the need for continued monitoring and analysis to learn from experience. Changing circumstances since publication of that book have added weight to the call for deeper investigation.

In 2007, IIEP returned to this theme with a policy forum held at IIEP headquarters in Paris. The papers provided for the policy forum, together with the discussions during the two-day event, were a major input to the present volume. The title of the policy forum was the same as the title of this book. Participants identified different types of tutoring in different settings, and discussed the policies which might be appropriate. They were aware that much uncertainty surrounded the theme, and that recommendations for policy should be cautious. Nevertheless, the discussion broke new conceptual ground and was thus of considerable significance.

In the IIEP tradition, policy forums focus on themes which have relevance to countries in the North and South, and in the East and West. Private supplementary tutoring certainly fitted this criterion, and the event facilitated very instructive comparisons of patterns in countries as distant as Australia, Botswana, France and the Republic of Korea. IIEP policy forums also seek to bring together planners, policymakers, practitioners and researchers. The policy forum on private tutoring was no exception, and generated very informative interchange between the groups. An additional dimension was provided by the fact that many participants were parents who faced questions of whether or not to employ private tutors for their own children. The present volume is based on the papers and discussions of the policy forum, on additional materials in the literature, and on follow-up discussions in various professional and academic meetings.

The metaphor of the shadow

The title of the 2007 policy forum used the metaphor that had been employed in the 1999 book (Bray, 1999a), which itself expanded the metaphor from writings by Marimuthu, Singh *et al.* (1991), Stevenson and Baker (1992) and George (1992). As explained in the 1999 book (p. 17), the metaphor of the shadow is appropriate in several ways. First, private supplementary tutoring only exists because the mainstream education system exists; second, as the size and shape of the mainstream system change, so do the size and shape of supplementary tutoring; third, in almost all societies much more attention focuses on the mainstream than on its shadow; and fourth, the features of the shadow system are much less distinct than those of the mainstream system. The book added (pp. 17-18) that:

Shadows can of course be useful. Just as the shadow cast by a sun-dial can tell the observer about the passage of time, so the shadow of an education system can tell the observer about change in societies. However, in some countries, parents, educators and politicians are highly critical of the way in which private tutoring has come to dominate the lives of families and pupils. Tutoring commonly creates and perpetuates social inequalities, and it consumes human and financial resources which perhaps could be used more appropriately in other activities. Critics add that private tutoring can distort the curriculum in the mainstream system, upsetting the sequence of learning planned by mainstream teachers and exacerbating diversity in classrooms. In this sense, unlike most shadows, private supplementary tutoring is not just a passive entity but may negatively affect even the body which it imitates.

The present book is entitled *Confronting the shadow education system* since it argues that the issues associated with private supplementary tutoring do need to be confronted. This does not imply that all aspects of private tutoring are negative. Private tutoring helps pupils to learn, and thus extends their human capital which can in turn contribute to economic development. It may also have valuable social functions, providing constructive opportunities for children and youth to interact with peers and others. Private tutoring also generates incomes for the tutors; and tutoring may assist mainstream teachers by helping pupils to understand lessons which otherwise might not have been understood. Nevertheless, tutoring can have major negative implications. It normally maintains or exacerbates social and economic inequalities; it may dominate children's

lives and restrict their leisure times in ways that are psychologically and educationally undesirable; and it can be perceived in some settings as a form of corruption that undermines social trust.

In most countries, this mix of positive and negative features creates a complex picture; and few societies have well-developed machinery to address the issues. Many policymakers and planners prefer to avoid difficult decisions by ignoring the phenomenon and leaving it to market forces. However, in many settings such a *laissez-faire* approach is problematic, and the shadow education system should indeed be confronted. Decisions on appropriate actions may be difficult, but policymakers and planners should at a minimum recognize that the phenomenon of private supplementary tutoring exists and that it has major implications. Going further, this book sets out a range of experiences around the world which may help policymakers and planners to identify appropriate measures for their own circumstances.

Structure of the book

Any effort to identify the policy implications of a phenomenon must begin with a description of the phenomenon and an identification of the dimensions requiring policy attention. With this in mind, the first part of the book commences by describing the size and shape of private supplementary tutoring. It notes patterns in different countries and world regions, and highlights variations at different levels of education. The book also notes diversity in the types of tutoring. The size of tutorial classes may range from one-to-one sessions between pupils and tutors to classes in huge lecture theatres. Tutoring may be provided on a face-to-face basis, by correspondence courses, over the telephone, or via the Internet. It is likely to have seasonal variations in intensity, and may be part of the daily lives of boys more than girls.

Having described the phenomenon, the book turns to the economic, social and educational implications. Tutoring may have beneficial dimensions in each of these categories, but can also be problematic depending on the nature and scale. Tutoring that is stimulated by government policies to support low achievers is very different from market-driven tutoring that mainly serves high achievers. Similarly, tutoring provided by university students on an informal basis is very different from that provided by professionals in commercial companies. Pupils in some settings find themselves under considerable pressure to invest in tutoring because their peers all seem to be receiving tutoring,

because their mainstream teachers emphasise the desirability of tutoring, and/or because their families perceive tutoring to be a major avenue for educational and thus economic advancement. At a wider level, much depends on the cultures of the societies concerned. Cultures can and do change, which helps to explain why in some countries tutoring has become more common than it used to be.

From the diagnosis flows the question what policymakers and planners can and should do to confront the shadow education system. The book suggests that they should begin by mapping contexts, objectives, and structures. They can then address ways to shape demand and/or supply. Policymakers and planners may find ways to harness market forces, and they are likely to want to improve regulatory structures. The responses to situations in which mainstream teachers apply pressure on their own pupils to pay for additional classes provided by those teachers for core school subjects are likely to be very different from the responses to tutoring provided independently of the schools. Responses are likely also to depend on the extent to which policymakers feel handicapped by financial, human or other constraints on the ability to implement their policies, which in turn will be influenced by cultural, administrative and other factors. Policymakers and planners are also likely to want various mechanisms for monitoring and evaluation to see how patterns change over time.

Finally, it is necessary at the outset to identify some of the conceptual boundaries of this book. First, it is only concerned with private supplementary tutoring of pupils at the level of primary and secondary schooling. Tutoring certainly exists at pre-primary and post-secondary levels, but it has different characteristics and raises different issues. Second, the book is only concerned with paid tutoring: it excludes tutoring which is provided free by relatives, teachers or other people. This tutoring may also have considerable importance to policymakers and planners, but again it is likely to have different characteristics and to raise different issues from tutoring which is provided in exchange for a fee. Third, the book is only concerned with tutoring in academic subjects taught in mainstream schools. Thus it is not concerned with ballet classes, for example, or with soccer, religious education or the learning of minority languages not taught in the pupils' schools. These themes are again recognised to be important, but they deserve separate consideration outside the framework of this book.

2. Diagnosis

Scale, intensity and mode

Precise data on the size and shape of private supplementary tutoring are difficult to obtain. This is for several reasons relating to providers and consumers:

- *Tutors* commonly avoid attention because many of them provide tutoring as an informal activity, earning income which is untaxed.
- *Students* may not welcome attention, because receipt of tutoring may imply that they are gaining unfair advantages over their peers and/or do not trust their teachers in the mainstream system, and because the students might fear being regarded as stupid.
- *Parents* may not welcome attention because they also may fear that it would be perceived as purchasing an unfair advantage and/or indicating distrust of the mainstream system, or fear that their children would be perceived as stupid.

Tutoring may also be difficult to measure because it commonly varies in forms, duration and intensity across different seasons. Most tutoring is received face to face, but it may range from individual attention to large classes. It may also involve correspondence courses or, increasingly, the Internet. Further, whereas some students receive tutoring in many subjects with great regularity over extended periods, others receive it only in a few subjects and on an intermittent basis. Nevertheless, sufficient studies have been conducted to permit the construction of a rough picture. Moreover, this picture has become more detailed as awareness has spread about the social and economic significance of private tutoring, and as both independent researchers and professional bodies have sought to learn more about the phenomenon.

Variations in scale

Table 1 reproduces data from a range of settings. It does not present statistics in a standardized format since the studies varied in their approaches, but it does show major patterns. The first striking observation is that tutoring is found in many parts of the world. This includes both low-income countries, such as Cambodia and Kenya, and high-income countries, such as Canada and Japan. Tutoring is commonly more visible

in urban than in rural areas, and in some cultures is received more extensively by boys than by girls.

Table 1. Cross-national indicators of private tutoring

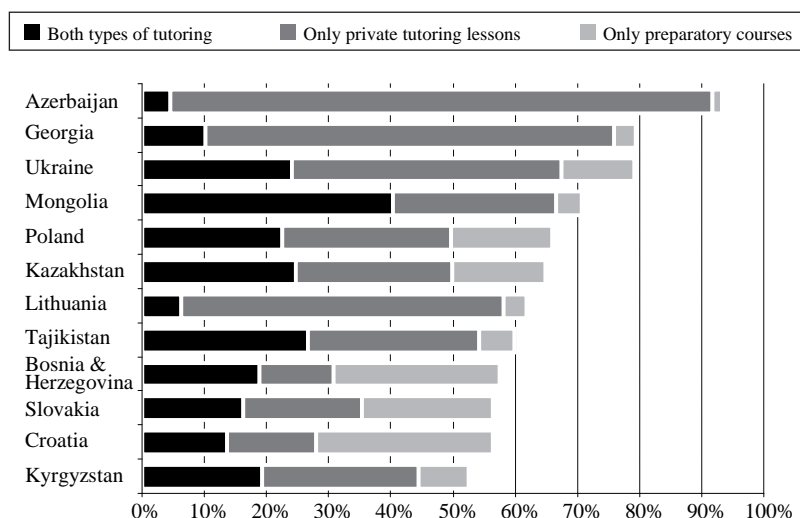
Location	Patterns
Bangladesh	National survey data from 16,400 households in 2005 were compared with similar data from 33,229 households in 1998. The data showed that tutoring was substantial, and expanded over this period. In 2005, 31.0% of primary school students were receiving tutoring (28.2% in rural areas; 51.7% urban) but in 1998 21.4% of pupils were receiving tutoring (18.1% rural, 44.3% urban).
Cambodia	Respondents in 31.2% of 77 primary schools surveyed in 1997/1998 indicated that pupils received tutoring, which consumed 6.6% of the total costs of primary education. A 2004 follow-up study showed that costs increased markedly at secondary level. In the top grade of lower secondary schooling, average household costs of tutoring were over four times those in the top grade of primary schooling.
Canada	In a 1997 national telephone survey, 9.4% of 501 adults with school-aged children indicated that their children were receiving private tutoring outside school hours, and a further 8.4% indicated that their children had done so in the past.
China	The 2004 Urban Household Education and Employment survey covered 4,773 households. It indicated that tutoring was received by 73.8% of primary, 65.6% of lower secondary and 53.5% of upper secondary students.
Cyprus	A 2003 study of 1,120 college students found that 86.4% had received private tutoring when in secondary school.
Egypt	A 2004 study estimated that households devoted 61.0% of education expenditures to private tutoring. A 1997 study estimated that household expenditures on tutoring in all levels of schooling accounted for 1.6% of gross domestic product. A 1994 survey of 4,729 households found that in urban areas 64.0% of primary children with 52.0% in rural areas had received supplementary tutoring.
Hong Kong	Government statistics suggest that 34% of primary and secondary pupils received tutoring in 2006. A 2004-2005 survey of 13,600 households suggested that pupils receiving tutoring were 36.0% at the primary level, 28.0% in lower secondary, 33.6% in middle secondary, and 48.1% in upper secondary.
Japan	A 2007 survey found that tutorial schools known as <i>juku</i> served 15.9% of Primary 1 children, that this proportion rose steadily in later grades, and that it reached 65.2% in Junior Secondary 3. In addition, 6.8% of Junior Secondary 3 pupils received tutoring at home, and 15.0% followed correspondence courses.

Location	Patterns
Kenya	A 1997 national sample of 3,233 Grade 6 pupils found 68.6% receiving private tutoring, ranging from 39.0% in North Eastern province to 74.4% in Nyanza Province. A parallel survey in three geographically distinct districts indicated that tutoring was much more common in urban than rural areas, and among boys rather than girls.
Viet Nam	In a 2001 sample survey of 72,660 Grade 5 pupils in 3,639 primary schools, 38% of pupils indicated that they were receiving tutoring. In 2002, tutoring was said to have consumed about 20% of household education expenditure. The figure peaked at 29% for pupils preparing for university entrance examinations, and was especially high in urban areas and in the Central Highlands and Southeast Regions.

Sources: Various studies reported in Bray (2006, pp. 517-518). Updates on Bangladesh in Nath (2008, p. 57); Egypt in World Bank (2008, p. 190); Hong Kong in Kwok (2009, p. 106) and Ng (2009, p. 1); Japan in Ministry of Education, Science, Culture and Sport (2008, p. 13); China data in Xue and Ding (2009, p. 119); Viet Nam data on 2001 survey in World Bank (2004, p. 81).

Data presented during the 2007 IIEP policy forum provided further examples. Silova (2007) provided statistics on private tutoring in 12 countries of Eastern Europe and Asia with shared historical links to the Soviet Union (*Table 2*). She remarked (p. 4) that while private tutoring had been modest in scale until the early 1990s, it then became “a vast enterprise”. Her statistics were derived from a pair of studies sponsored by the Open Society Institute in 2004-2005 and in 2005-2006 (see also Silova, Būdienė and Bray, 2006; Silova, 2009). Investigators targeted first-year university students, asking them to reflect on their tutoring experiences during their final year of secondary schooling. The researchers in Azerbaijan, Georgia, and Croatia conducted an additional survey of secondary school students, thus expanding the pool of respondents and the scope of the study. Overall, the surveys targeted 8,713 respondents in the first study, and 3,101 in the second one. The research found two broad types of tutoring: lessons offered by individuals, and preparatory courses offered by institutions for admission to universities. Private lessons were generally more common in Mongolia and in the countries of the former Soviet Union (especially Azerbaijan, Georgia, and Lithuania), while preparatory courses were more common in the countries of the former Yugoslavia (Croatia, Slovakia, and Bosnia and Herzegovina), which had better developed and stronger markets. The most striking statistics were from Azerbaijan, where over 90 per cent of university students reported that they had received private supplementary tutoring in the last grade of secondary school.

Table 2. The scale of private tutoring in selected countries of Eastern Europe and Asia



Source: Silova (2007), p. 5.

In a different context, Paviot (2007) reported on the design of questionnaires for the Southern and Eastern Africa Consortium for Monitoring Education Quality (SACMEQ), a partnership of 15 Ministries of Education. Sets of comparable data had been collected from Grade 6 pupils in 1995 and 2000 (*Table 3*). The data were not completely clear, because they included unpaid tutoring, e.g. by teachers and family members, as well as paid tutoring. Nevertheless, they showed considerable amounts of tutoring in some countries, and also indicated notable increases. While an average of 49.0 per cent of Grade 6 pupils reported receipt of supplementary tutoring in 1995, by 2000 this had risen to 68.3 per cent.

These remarks resonated with the pattern in Uganda described by Eilor (2007). He lamented the paucity of firm statistical information across the grades, but observed (p. 14) that tutoring appeared to be “entrenched and generalized in all the major urban centres”. In rural areas, tutoring was reported to be confined to the grades in which pupils sat major examinations, but in urban areas it was said to be common in all grades. Eilor added (p. 14) that although the intensity of tutoring varied in different regions, the phenomenon “appears to have grown tremendously ... in the last two decades and is now widely visible across all sub-sectors”. The 2000 SACMEQ survey of Grade 6 pupils had indicated that 81.8 per cent

of sampled Primary 6 pupils in Uganda reported having received extra lessons outside school hours, and that 51.4 per cent of these pupils had paid for these extra lessons (Byamugisha and Ssenabulya, 2005, pp. 71-72).

Table 3. Percentages of Grade 6 pupils receiving supplementary tutoring in Eastern and Southern Africa, 1995 and 2000

	SACMEQ I (1995)		SACMEQ II (2000)	
	Percentage	Sampling error	Percentage	Sampling error
Kenya	68.6	2.53	87.7	1.91
Malawi	22.1	1.96	79.7	3.47
Mauritius	77.5	1.44	86.6	1.07
Namibia	34.7	2.08	44.7	2.33
Zambia	44.8	2.35	55.1	3.56
Zanzibar (Tanzania)	46.1	1.26	55.9	0.95
Average	49.0	1.94	68.3	2.22

Source: Paviot, Heinsohn and Korkman (2008), p. 152.

In yet another type of setting, Sujatha (2007, p. 3) focused on four states in India. Her sample of 6,948 students in secondary Classes IX to XII (Grades 9 to 12) showed some variation between the states and grades, but an overall average of 41.3 per cent were reported to be receiving private supplementary tutoring (*Table 4*). Boys were more likely to receive tutoring than girls, the respective proportions being 54.9 and 39.6 per cent. These findings matched research reported by Jalaluddin (2007, p. 1), which suggested that 70 per cent of households in West Bengal invested in private tutoring at the level of primary education, and that tutoring accounted for over a third of total family expenditures on education.

Table 4 Percentages of students receiving private tutoring in four states of India, by grade

	IX	X	IX – X	XI	XII	XI – XII	IX – XII
Andhra Pradesh	11.3	52.7	32.3	-	-	-	-
Kerala	43.0	71.6	55.0	31.5	36.0	33.5	43.7
Maharashtra	43.2	56.0	49.3	41.0	38.5	40.0	44.7
Uttar Pradesh	31.4	62.0	45.7	31.4	38.6	34.9	40.7
Average	32.0	58.8	44.6	36.0	53.8	36.8	41.3

Note: The sample in Andhra Pradesh covered only Grades IX and X.

N = Classes IX-X: 4,031; Classes XI-XII: 2,917.

Source: Sujatha (2007), p. 3.

Participation rates in Turkey were also reported to be high, and to have expanded significantly. Three basic categories of tutoring were identified by Tansel and Bircan (2007, pp. 5-6). One kind was one-to-one tutoring on requested subjects at a privately-agreed price. A second type was tutoring by mainstream teachers on school premises but for supplementary pay outside school hours. These courses, which were mainly found at the elementary level, were organized by school boards with permission from the Ministry of National Education and at rates determined by the Ministry. The third type was private tutoring centres, known as *dersane*, which served both elementary and secondary school students and which also provided courses for entry to the public service. The private tutoring centres emerged in the early 1960s and were brought under a legal framework in 1965. They must register with the Ministry of National Education, and pay taxes on their earnings. In 1975-1976, there were 157 registered tutoring centres in Turkey. Two decades later there were 1,292, and by 2005-2006 there were 3,986 – more than the total number of secondary schools (3,406). The tutoring centres had 1,072,000 primary students, compared with 2,076,000 secondary students (Tansel and Bircan 2007, pp. 16-17).

The pattern in Austria was rather different. The Ministry of Education was reported by Gruber (2007, p. 3) to have “no data whatsoever on the overall national extent of private supplementary tutoring, on the relative importance of different types of providers, on the reasons for its utilization or on the way individual schools deal with the tutoring phenomenon”. However, the consumer protection unit of the Austrian Chamber of Employees, which recurrently surveys the costs of tutoring, estimated in 2006 that annual national expenditure on private tutoring was €140 million. Calculations by the Austrian Chamber of Employees were consistent with those of a research project conducted by the University of Vienna which estimated that 20 per cent of the Austrian secondary school population received tutoring of some kind (Wagner *et al.*, 2003, quoted by Gruber, 2007, p. 3).

Other data show that private tutoring has become a significant phenomenon elsewhere in Western Europe. In England, a 2008 survey of 1,500 parents found that 12 per cent of primary school pupils and 8 per cent of secondary school pupils were receiving private tutoring (Peters, Carpenter, *et al.*, 2009, p. 2). In France, a 1992 study found that about 25 per cent of students in one region received tutoring (Glasman, 2007, p. 1). French government initiatives during the subsequent decade

facilitated considerable expansion of the sector (Melot, 2007; Anglade, 2008). In Greece, a survey in 2000 of first-year university students found that over 80 per cent had attended preparatory schools of the intensive ‘cramming’ type known as *frontistirio*, 50 per cent had received individual private tutoring, and one third had received both group and private tutoring (Psacharopoulos and Papakonstantinou, 2005, p. 105). And in Ireland, a survey of 1,496 students who had completed their upper secondary education in 2003 indicated that 45 per cent had received paid private tutoring during their last year of school. This was a significant increase from the 32 per cent of the same age group in 1994 (Smyth, 2009, p. 9).

Patterns in Australia, the United States of America (USA), and Canada may also be set alongside the patterns in Western Europe. Watson (2007) reported that private tutoring had received little attention in Australia, but that in 2004 the federal government had introduced a pilot voucher scheme to fund private tutoring of students who had fallen behind mainstream achievement in Year 3. The scheme assisted 6,200 students during 2005, one third of the eligible cohort. In addition to this government-sponsored scheme were a growing number of private initiatives. These developments paralleled counterparts in the USA, particularly ones implemented as a result of the No Child Left Behind (NCLB) legislation which was introduced in 2002 and which has provided government resources for private providers (Ascher, 2006; Burch, Donovan, and Steinberg, 2006; Vergari, 2007). Canada has not had parallel government legislation but has also seen substantial growth in tutoring. Davies and Aurini (2006, p. 123) reported that in the locations of their research, the number of formal tutoring institutes grew between 200 and 500 per cent during the previous 30 years. About 24 per cent of Ontario parents with school-aged children had recently hired tutors, and 50 per cent of all Canadian parents claimed that they would hire a tutor if they could afford to do so.

Less research has been conducted in Latin America, but tutoring is also noticeable in at least some parts of the region, especially in urban areas and at the upper secondary level. In Brazil, for example, Mattos (2007) has examined the modes of tutors’ operations in Rio de Janeiro, and Barros (2008) has addressed the phenomenon in Bahia.

Box 1. Classifying patterns of private tutoring

Review of patterns around the world shows ways in which countries might be grouped according to the scale and nature of private tutoring. Such grouping would be based on historical data on the emergence of tutoring as a significant activity, on cultural factors which promote or limit tutoring, and on the nature of links between the shadow system and government education policies.

- In *East Asian societies* such as Japan, Hong Kong, Korea, and Taiwan, tutoring has long been a vigorous activity and is deeply embedded in the culture. Part of the explanation for this lies in Confucian traditions which value education and which stress diligence. Tutoring particularly serves high achievers.
- In *former Soviet countries and Eastern Europe*, private tutoring was modest in scale until the early 1990s, but greatly expanded when economies collapsed and teachers were forced to earn extra incomes through tutoring to stay above the poverty line. Pupils across the range of academic ability may be involved.
- In *Western Europe, North America and Australasia*, tutoring remains modest in scale compared with East Asia and the former Soviet countries, but has greatly expanded and become more visible as policymakers have stressed competition between schools and as parents have come to see the rewards from investment in private tutoring. Some governments have encouraged tutoring as a way to help low achievers.
- Tutoring has also become more visible in *Africa*. In part, the trend reflects teachers' awareness of the revenue-generating opportunities available to them in education systems which do not have strong systems for accountability and supervision. In this respect, African systems of education may begin to resemble those in *South Asia*, where tutoring has become an established part of daily life, especially in urban areas. As in the former Soviet countries, teachers see tutoring as a way to supplement inadequate incomes.
- In *Latin America*, tutoring is relatively modest except at the upper secondary level. This again reflects traditions in education systems – but these could change, just as they have in Western Europe, North America, and Australasia.

These different categories are useful insofar as they may suggest different policy needs. Planners should not assume that action is not needed if the scale is modest. Rather to the contrary: this may be the time that action *is* needed, on the grounds that prevention of problematic features is better than cure.

Variations in intensity

Statistics presented during IIEP's policy forum exemplified a range of patterns and the major variables in the intensity of private tutoring. For instance, Neto-Mendes and Costa (2007) reported on their study of four

secondary schools in a Portuguese town over a three-year period. Data were collected from the entire Grade 12 populations of these schools. *Table 5* extracts the data for 2005-2006 for the four schools which, to preserve anonymity, were renamed by colours. Between 52 and 65 per cent of the students received tutoring. Most students spent between 1 and 3 hours a week on private tutoring, but many spent 4 to 10 hours a week, and a few spent more than 10 hours a week. These durations naturally correlated with the costs.

Table 5. Intensity of tutoring among Grade 12 students in four schools, Portugal, 2005-2006

School	No. of students	% receiving tutoring	Hours/week spent in tutoring				--- Monthly costs (€) ---			
			1-3	4-10	10+	NA	70	71-210	210+	NA
Blue School	161	65%	54%	42%	2%	2%	31%	56%	7%	6%
Yellow School	97	52%	56%	36%	4%	4%	46%	50%	—	4%
Green School	122	52%	59%	38%	—	3%	38%	53%	3%	6%
Pink School	167	63%	54%	45%	1%	—	24%	66%	8%	2%

NA = No answer.

Source: Neto-Mendes and Costa (2007), p. 7.

Related data for Portugal were generated by a 2005 survey conducted by the Ministry of Education of 31,035 entrants for the national university entrance examinations (Costa, Neto-Mendes and Ventura, 2008). This survey indicated that 54.7 per cent of them had received private tutoring in Grades 10 to 12. This was clearly the most prominent stage for receiving tutoring, since only 7.7 per cent of respondents had received tutoring in Grades 7 to 9, and only 1.6 per cent in Grades 5 and 6. Among the respondents who had received tutoring, 55.9 per cent had done so regularly throughout the academic year of the survey. A further 27.5 per cent had received tutoring during part of the year, while 16.6 per cent received it just before the examinations.

The surge in intensity just before examinations is also evident in other countries. Mauritius, for example, has important examinations at the end of primary school as well as at lower and upper secondary school, during which private tutoring peaks (Obeegadoo, 2007). In Namibia, a surge is evident just before the Grade 10 and Grade 12 examinations (Nghiyoonanye, 2007). In Viet Nam and Singapore, surges are at comparable points in the final years of primary and secondary education (Dang, 2007; Tan, 2009).

Table 6, presenting data from four Indian states, shows a different dimension of intensity, namely the number of subjects in which students received private tutoring. At the lower secondary level, Kerala had the greatest frequency of private tutoring (see *Table 4*, above) and the strongest intensity, while Andhra Pradesh had the lowest frequency and the weakest intensity. At the higher secondary level, students were less likely to receive tutoring in a large number of subjects, in part because the curriculum caused them to specialize in a smaller number. At the lower secondary level, the principal subjects in the curriculum were mother tongue languages, English, Hindi, mathematics, general science, and social studies. Over 90 per cent of students in the sample received tutoring in mathematics, with the next most common subjects being science and English (Sujatha, 2007, p. 12). In Kerala, 98.8 per cent of students received tutoring in mathematics. In Uttar Pradesh, however, the proportion was only 73.0 per cent, possibly because mathematics in that state is not compulsory. At the higher secondary level, students in the science and mathematics stream were more likely to receive tutoring than students in other subject streams (*Table 7*).

Table 6. Percentages of students receiving tutoring in different numbers of subjects, India, 2005

States	Lower secondary				Higher secondary			
	1 subject	2 subjects	3 subjects	All subjects	1 subject	2 subjects	3 subjects	All subjects
Andhra Pradesh	58.1	36.7	3.4	1.7	-	-	-	-
Kerala	7.0	12.9	12.4	67.6	18.8	47.4	13.1	20.7
Maharashtra	12.0	21.8	55.3	10.9	38.0	55.9	6.1	0.0
Uttar Pradesh	7.8	21.0	46.8	24.3	35.1	40.6	21.7	2.6
Average	13.3	20.7	39.1	27.0	33.0	49.5	12.4	5.1

Source: Sujatha (2007), p. 11.

Table 7 Percentages of Indian higher secondary students in different subject streams receiving tutoring, 2005

Stream	Kerala	Maharashtra	Uttar Pradesh	Total
Science and mathematics	45.4	55.7	52.1	52.3
Arts	23.4	19.4	15.0	17.5
Commerce	20.1	17.8	47.4	19.8
Other	0.0	1.6	10.0	4.3

Source: Sujatha (2007), p. 13.

When the hours of tutoring are added to the hours of schooling, the learning day may be very long. This was highlighted by Sou (2007, p. 5)

with reference to Macao, China. The official learning day for primary students was 5.5 hours but pupils commonly received tutoring for a further two to four hours, making a total day of 7.5 to 9.5 hours. At the secondary level, the official learning day lasted 7 hours but pupils commonly received two to three hours of tutoring making a total of 9 to 10 hours. Sou remarked (p. 5) that addition of the hours of tutoring “has seriously violated the normal proportion of time allocation”.

Variations in mode

Tutoring can be delivered through many modes, which are evolving with the development of new technologies. Most tutoring is delivered in person, but some is delivered by phone, television, and the Internet. Formerly, a lot of tutoring took the form of postal correspondence courses, but this now has been mostly replaced by websites and email.

Tutoring in person may also vary greatly in format. Families with sufficient incomes may choose to employ tutors to work with their children individually. Alternatively, pupils may receive tutoring in small groups, in large groups, and even in full-size lecture theatres with overflow rooms supported by video links. Each of these modes has different implications for pedagogy, for costs to the users, and for government policies.

In some countries, much private supplementary tutoring is provided by mainstream teachers who already have responsibility for their pupils. While at first sight it might seem beneficial for teachers to be able to give extra assistance to pupils they already know well, this arrangement can also create major problems. In the worst cases, there is an element of blackmail. Teachers may omit part of the curriculum during the mainstream lessons in order to expand the market for private tutoring after school hours. Since in many education systems the teachers decide which pupils are promoted to the next grade, parents find themselves trapped into paying for tutoring because they know that failure to do so will ultimately cost more since their children will be required to repeat the grade.

The use of television to deliver tutoring programmes may be found in countries as different as Korea and South Africa. In South Africa, programmes are available on both public and pay-to-view channels (Reddy, 2007, p. 14). Tutors can set up the topic and link to a school from which students send in their questions and the tutors work through the examples. The system cannot usually accommodate more interaction between pupils and tutors, and is rarely personalized. The broadcasts release the tutors

and their pupils from some of the constraints of distance, but are usually confined to national boundaries.

Internet tutoring provides an even more effective release from the constraints of distance, and can be provided across national and even continental boundaries (Ventura 2008a). Emails, internet telephony, and web cameras allow the service to be tailored to specific clients and their needs. Tutors who meet their pupils directly need sufficient population density to ensure adequate supply of clients, and commonly site their premises near transportation hubs. Suppliers of Internet tutoring can serve remote populations as easily as urban ones, and can do so in any convenient language. Thus, for example, tutors in India can serve clients in the USA through the medium of English, and tutors in mainland China can serve clients in Hong Kong, Malaysia or Singapore through the medium of Chinese.

These observations show that the mode for tutoring is shaped by the providers as well as by the clients. Many tutors of secondary school pupils are university students wanting extra income; and some primary students are tutored on the same basis by secondary school students. University students – let alone the secondary school students – rarely hold professional teaching qualifications. However, they may connect well with the students because they are in adjacent age groups.

At the other end of the age scale are retirees who are glad to continue to contribute to society and to earn supplementary incomes. Because they are of a different generation, the retirees are likely to have different teaching styles and are less likely to be proficient in computer-based information and communication technologies (ICTs). Some of these older tutors have been full-time teachers in the school system, forced into retirement by regulations. In the tutoring marketplace there may be less concern about official retirement ages and more interest in the balance between price and quality of services on offer.

While much private tutoring has always operated on an informal basis, the sector is becoming increasingly structured and commercialized. This is another indicator that shadow education is increasingly delivered in systems. Companies have been established which may be small and local, or large and multinational. Among well-known multinational firms is Kumon, which originated in 1954 in Japan when its founder, Toru Kumon (1914-1995) sought a way to improve his son's mathematics performance. Half a century later, Kumon claimed to serve over 4 million

students in 45 countries, operating through a franchising system that specializes in both mathematics and languages (Kumon, 2008). Other tutoring franchises include Sylvan, the Academy for Mathematics and Science, and the Oxford Learning Centre. Davies and Aurini (2006, p. 124) noted that franchising tends to spur business growth, and highlighted the dramatic development of tutorial franchises in Canada.

Technology is also permitting mixed approaches. This may be exemplified by SchoolCity, a new style of Japanese *juku* which offers opportunities for pupils to learn at home or at regional hubs through a Personal Computer Network (Suzuki, 2009). The courses provided by the Net-School have three modules: (i) TV conferencing and lessons; (ii) self-study through the website, and (iii) study with printed sources. SchoolCity has its own organizational structures, and is another manifestation of the ways in which tutoring can become a system in its own right, not just an imitation of the mainstream. The ‘towns’ through which SchoolCity operates have their own courses and clients, and cover wide geographic areas. SchoolCity also has subsidiary companies which focus on advertising, software, assessment systems and interpretation.

The variations in mode outlined here are of major significance for policymakers and planners seeking to determine what policies to answer the question ‘What government policies for what private tutoring?’. Thus:

- Tutoring which is entirely driven by the *marketplace* must be treated very differently from tutoring that is fully or partly driven by government incentives, as is the case for example in the USA under the No Child Left Behind legislation.
- *Internet* tutoring, perhaps from another country, presents significantly different policy implications from tutoring delivered in person by registered providers with shop fronts in residential areas.
- Tutoring provided by teachers on a more or less *obligatory basis* to the students for whom those teachers already have responsibility in the school system is very different from coaching which has been *actively sought by parents* on their own initiative.
- Tutoring provided by *trained* professionals is very different from that provided by *untrained* secondary school or university students.
- Tutoring provided on a *one-to-one* basis is very different from tutoring provided in *large lecture theatres* with overflow video screens.

When all these different types have been classified, policymakers and planners will be shaped in their thinking by an understanding of the economic, social and educational impact. These dimensions are accordingly the focus of the next section of this book.

Box 2. Making evaluative judgements

“Obviously, private tutoring is not a good or bad thing in itself. A great deal depends on how, and under which circumstances, it is provided. Is it provided by mainstream teachers, external tutors, or private centres? Are teachers providing tutoring lessons to their own pupils or to other pupils? Does private tutoring complement the provision of the regular school? Does it corrupt the mainstream system in different ways?” (Poisson, 2007, p. 4)

Economic, social and educational impact

The previous sections have shown that the scales, intensities and modes of tutoring are diverse. This fact, combined with diversity of economic systems, cultures and other variables, creates challenges for identification of the economic, social and educational impact of tutoring. Nevertheless, much can again be learned from comparative analysis.

Economic impact

It is evident that private tutoring is a big business in some parts of the world. Nowhere is this more apparent than in Korea, where total household expenditure on private tutoring in 2006 was estimated at US\$24 billion, or 2.8 per cent of Gross Domestic Product (Kim and Lee, 2008, p. 3). The Korean tutoring industry provides incomes for tutors and related employees, whose expenditure patterns have wider economic ripple effects. Other examples of household spending on private tutoring include:

- In *France*, the sector was estimated in 2006 to be worth approximately €2.21 billion, and to be growing at about 10 per cent per year (Melot, 2007, p. 50).
- In *Greece*, cram schools at the senior secondary level were reported to consume €1.1 billion in 2000, which exceeded the government expenditure on education at that level (Psacharopoulos and Tassoulas, 2004, p. 247).
- In *Turkey*, one estimate of the cost of tutoring centres in 2004 was US\$2.9 billion, which amounted to 0.96 per cent of Gross National

Product – although other estimates were lower (Tansel and Bircan, 2007, p. 14).

- In *Egypt*, households were estimated in 2002 to be spending 81 million Egyptian pounds (approximately US\$18 million) per year on tutoring at the pre-university level, equivalent to 1.6 per cent of Gross Domestic Product (World Bank, 2002, p. 26).

Elsewhere, of course, the economic role of tutoring is more modest. However, it may still play a significant part in the incomes of teachers whose salaries are meagre and who feel forced to turn to tutoring in order to secure adequate incomes for their families. In Sri Lanka, for example, the monthly wage of a graduate government-employed teacher in 2007 was the equivalent of between US\$108 and US\$135 (Samath, 2007, p. 1). These wages were very low compared to those of the corporate sector, but a mathematics teacher at a Colombo school could earn up to US\$10 per hour through private tutoring – earning the equivalent of the government salary in 3 to 4 days. In Tajikistan, in 2006 teachers earned on average the equivalent of US\$24 per month from their official salaries, but an additional US\$1 to US\$2 per hour from private tutoring (Kodirov and Amonov, 2009, p. 144). Even the supplementary incomes earned by university students who are part-time tutors may have spin-off economic benefits insofar as those incomes enable the students to pursue their studies and gain skills that contribute to economic development.

Turning from the incomes of the tutors to the learning of the students, economic theory suggests that acquisition of skills in mathematics and languages may be a valuable form of human capital that can contribute to economic growth. It would of course be necessary to ask what the individuals would be doing if they were not learning, and thus to assess the opportunity cost; but for young people in school systems, in economic terms the opportunity costs would be relatively low since they are not likely yet to have become economically productive.

At the same time, tutoring may in some circumstances promote some inefficiencies in the allocation of resources through its role as a selection device. Kim and Lee (2008, p. 31) observed that in Korea:

Given that the financial market is not perfect, a high ability child with poor parents might end up in a low-ranked university, as they are not able to foot the bills for private tutoring. That inequitable distribution of private tutoring would also lead to an inefficient allocation of talents because the marginal rate of substitution between education and other goods is not the same across households.

Other observers have also highlighted inefficiencies, arguing that tutoring diverts resources from more productive uses. Especially problematic are circumstances in which teachers of mainstream classes deliberately reduce the commitment to their work in order to expand the demand for supplementary tutoring. For example, Sujatha (2007, p. 20) noted that in India:

... teachers involved in private tuition do not take classroom teaching seriously and at times coerce the students to seek private tuition either from them or in certain coaching centres. Thus, there is a nexus between school teachers and private tuition centres.

Another economic aspect concerns taxation. Much tutoring is carried out informally, beyond the reach of the government tax collector. Government authorities are likely to feel that individuals who should be contributing to the common pot are not doing so. And in turn, the fact that taxation income is diminished means that the governments cannot spend the resources on their own economic or social welfare objectives.

Social impact

Most forms of private tutoring self-evidently maintain or exacerbate social inequalities since high-income households are more easily able to afford greater quantities and better qualities of tutoring compared with low-income households. The chief exceptions to this pattern are in government-sponsored schemes, such as the No Child Left Behind project in the USA, in which the authorities provide resources to low achievers who are also likely to have relatively low incomes in order to permit them to invest in tutoring.

Family pressures and social space

Tutoring may also be part of a phenomenon in which families feel social pressure. In the words of a Korean mother recorded by Kim (2007, p. 11), a major reason why parents send their children for tutoring is that they are anxious: “If a kid is not very good and does not attend a private institute, people say the mother must be either crazy or poor.” Expansion of tutoring also reflects changes in the structure of the family (Kim, 2007, p. 12):

Korean families consist of one or two children. In the generation of parents, there were three to five children. Given the decreasing number of children in family, and good college credentials persistent importance in determining individual status, young parents want more

individuated caring for their children's academic achievement than previous parents. For young parents, schools do not meet their demand properly: schools take care of students as a group, not individually.

A related observation may be made about France, where families are much smaller than in previous generations, and parents and children are less likely to live near grandparents and thus less likely to access support from them. Glasman (2007, p. 1) added that, for parents who can afford it, private tutoring is a way to purchase peace within the family. Homework tends:

... to become, in some families, 'a locus of tension' between the parents and their children (especially when they are teenagers). Consequently, sending one's child to a private tutoring centre – or to a third party able to help him or help her with school work or school training – is a way to remove the tensions away from the house thereby contributing to the pacification of relationships among family members. Getting started with homework is a difficult moment for the parents when their children don't want to get down to work. Helping a teenager who has not understood any part of the course at school is not easy, even when (or especially when?) the father or the mother is highly qualified in the same subject. So it is much better if the problems are dealt with elsewhere.

Elaborating on this, Glasman observed that 'peace-making' between parents and children may be easier in an out-of-school structure than inside the schools:

An out-of-school structure can be seen as a sort of intermediary place, which is neither the family (with high expectations and tensions, as seen above), nor the school (which evaluates, gives marks, etc.). In such an intermediate spot, the students can confess they have not understood or they have big gaps even if they should not, or they have not really worked even if they should have done, they may try, they may be mistaken and try again, and, little by little, they can become more and more self-confident, far from their parents' impatience and the fear of the school verdicts.

On a rather different dimension, tutoring may provide other forms of social space for the pupils that they cannot find in schools or in the family. In Egypt, for example, most secondary schools are gender-segregated. Private lessons provide a welcome opportunity for students to meet friends, and particularly those of the other sex. Hartmann (2008, p. 58) reports the views of one manager of a tutoring centre: "I think about 50% of students

attend lessons here ... because they really want to learn something, the other 50% come in order to meet friends.”

Gender dimensions

Elaborating on the gender dimensions, tutoring may interact with other forces in different ways. Among the most obvious are disparities in enrolments. At the 2007 IIEP policy forum, Tansel and Bircan (2007, p. 7), noted that in developing countries girls lag behind boys in education and that “Turkey is no exception”. They added that although in Turkey economic returns to women’s education were at least as high or perhaps higher than those to men’s education, parents tended to invest more in their sons because the sons were considered to be their main providers of support for their parents in old age. Tansel and Bircan indicated (p. 18) that in 2005-2006 the gender gap among students in private tutoring centres was 5 percentage points, that is, total enrolments were divided into 52.5 per cent male and 47.5 per cent female. However, this was a smaller gap than among secondary school graduates where the gap was 9.2 percentage points (54.6 per cent male, 45.4 per cent female). In that respect, the tutoring centres appeared to be less gender imbalanced than the mainstream secondary school system. One explanation might be that higher-income families offered tutoring to both sons and daughters, and that there was thus less gender discrimination than among lower-income families.

As noted above, gender imbalances were also remarked upon by Sujatha (2007) in India, where again the explanation for higher enrolments in tutoring among boys is likely to reflect a combination of cultural and economic factors. Data from other countries which echo this pattern include the following:

- In *Kenya*, Buchmann (2002, pp. 142-143) noted significant progress towards equality of enrolments in the mainstream education system, but added that “lingering gender stereotypes regarding job prospects and gender biases in children’s expected contributions to housework may mean that parents are less willing to provide additional educational resources to their daughters, especially in cases where family resources are severely limited (i.e. in poor families or those with many children)”. Buchmann showed that girls did more housework than boys, and observed that this was especially detrimental to their chances of taking part in shadow education.

- In *Korea*, a study by Kim and Lee (2008, p. 25) found an income elasticity of demand for private tutoring of 0.51 for boys and 0.57 for girls. This indicated that private tutoring for boys was considered more of a necessary good, while for girls it was more of a luxury good. Kim and Lee noted that the labour force participation rate for women was much lower than that for men, and consequently that the anticipated returns would be higher for men.
- In *Bangladesh*, a study by Nath (2008, p. 58) at the primary school level found that 33.8 per cent of boys received private tutoring compared with only 28.1 per cent of girls.

However, these patterns are not uniform. Dang (2007, p. 692) did not find significant gender disparities in Viet Nam at either primary or secondary levels; and SACMEQ data on Kenya did not produce findings consistent with those of Buchmann (Paviot *et al.*, 2008, p. 153). Similarly, Elbadawy, Ahlburg *et al.* (2006) did not find gender inequalities in Egypt. Gender disparities are evident in the mainstream education system, and the researchers had expected the 1998 Egypt Labor Market Survey to reveal even more pronounced disparities in the tutoring sector. They felt that the education premium in the marriage market – whereby girls with more education are likely to marry richer and/or more educated husbands – might be the reason for the disparities being less severe than expected. Elsewhere, the gender disparity favours females rather than males. In Kyrgyzstan, for example, Bagdasarova and Ivanov (2009, p. 134) found that among students receiving private tutoring lessons, 65.4 per cent were female and 34.6 per cent were male. A relevant factor in the explanation was that approximately two thirds of the students grew up in well-educated families, with 65 to 70 per cent reporting that at least one parent had a university degree. Nevertheless, this factor might have been expected to contribute to gender equality more than imbalance favouring girls.

Another side of the gender dimension concerns teachers. In some societies, tutoring is more likely to be provided by male teachers. One investigation in Cambodia highlighted variations through which no pupils in Grades 1 to 3 of a specific rural school were receiving tutoring, but at Grades 4, 5 and 6 the proportions were 50, 25 and 90 per cent. When asked why the proportion in Grade 5 was so much lower than in Grades 4 and 6, the headteacher replied that the class was taught by a woman who was busy with her family and could not provide regular tutoring (Bray, 1999b, p. 60). Similarly, Hartmann (2008, p. 68) reported that while some

Egyptian female teachers gave private lessons at home, private tutoring centres seemed to be completely male-dominated. She explained:

There are obvious reasons why female teachers are less likely to offer private lessons, i.e. mainly a lack of time and energy due to their domestic responsibilities, especially if they have a family. Apart from this, it is socially less acceptable for women, especially young unmarried women, to spend their afternoons outside home, to visit students or invite them to their own house ... Female teachers are also more likely to be supported financially by their husbands or families and are thus not as dependent on an extra income as their male counterparts.

Cultures are of course very different in other parts of the world, but it would seem likely that male teachers are more likely than female tutors to search for markets and to insist on their own mainstream pupils accepting tutoring.

Rural/urban location

Another dimension of social inequalities, remarked upon above, concerns rural/urban location. Tutoring is more common in cities for three major reasons. First is that populations in cities tend to have higher incomes, and are therefore more easily able to afford tutoring; second is that cities are commonly more competitive environments which are dominated by wage-earning labour markets that demand educational qualifications; and third is that the population density in cities provides sufficient market to encourage tutors to supply the service.

Empirical evidence presented during the policy forum included data from Eastern Europe and Asia (Silova, 2007, p. 7). In all of the 12 countries listed in *Table 8*, tutoring was greater in urban than in rural areas, the widest gap being 24.2 percentage points in Kazakhstan. Further data presented by Sujatha (2007) for an Indian rural sample showed that an average of 29 per cent of lower secondary pupils were receiving tutoring, compared with 64 per cent of their urban counterparts (see *Table 9*). These patterns became mutually reinforcing, because the rural students without tutoring were less easily able to keep up with the system and were more likely to drop out altogether.

Table 8. Rural and urban differences in consumption of private tutoring in Eastern Europe and Asia (%)

	Rural	Urban
Azerbaijan	87.8	95.0
Bosnia and Herzegovina	56.9	57.7
Croatia	50.1	61.6
Georgia	76.9	81.2
Kazakhstan	56.6	70.1
Kyrgyzstan	37.7	61.9
Lithuania	54.9	69.7
Mongolia	69.8	71.6
Poland	59.9	70.1
Slovakia	54.7	58.2
Tajikistan	41.0	49.9
Ukraine	77.7	82.0

Source: Silova (2007), p. 7.

Table 9. Percentages of pupils receiving private tutoring at lower secondary level in rural and urban areas of four Indian states

	Rural	Urban
Andhra Pradesh	20.7	38.7
Kerala	66.5	70.6
Maharashtra	29.3	72.7
Uttar Pradesh	32.0	52.7
Total	29.0	64.0

N = Rural 1,492; Urban 2,539.

Source: Sujatha (2007), p. 5.

These statistics chime with those reported elsewhere in the literature. For example, data from the 1998 Egypt Labor Market Survey of 4,816 households in 22 of the country's 27 governorates indicated that 39.6 per cent of students in rural areas were receiving private tutoring compared to 52.0 per cent in urban areas (Elbadawy *et al.*, 2006, p. 16). The gap in average yearly spending per child was even wider: 188.9 Egyptian pounds in rural areas, compared with 491.5 Egyptian pounds in urban areas. Similarly, in Bangladesh statistics reported by Nath (2008, p. 58) indicated that 19.6 per cent of primary Grade 1 pupils in rural areas were receiving private tutoring compared with 43.6 per cent in urban areas. In Grade 5, the end of the primary cycle, the gap was even wider: 35.6 per cent in rural areas compared with 62.2 per cent in urban

areas. These statistics reflected both demand and supply. With regard to the latter, in Australia Watson (2008, p. 10) remarked that the inadequate supply of tutors in rural and remote areas was a significant obstacle to the government's tutoring voucher scheme, yet students in these regions consistently performed below the national average in standardized tests.

Ethnicity and race

A further dimension of social inequalities may concern ethnicity and race. For example, in Viet Nam a study indicated that in 1997-1998, 37.0 per cent of ethnic majority students at primary level were receiving tutoring compared with only 7.1 per cent of ethnic minority students (Dang, 2007, p. 688). At the lower secondary level, respective proportions were 60.7 and 19.0 per cent; and at upper secondary level they were 78.0 and 55.9 per cent.

In other settings, by contrast, minority students may be the group receiving more tutoring. Ireson and Rushforth (2005, p. 6) found that in market-driven settings in England, children of South Asian, Chinese, and Afro-Caribbean ancestry (though on small samples) seemed to be more likely to receive tutoring than white Europeans. In Canada, much of the tutoring in Vancouver and Toronto is led by migrants from Hong Kong, Taiwan, and mainland China. In the rather different context of the USA, the government-driven No Child Left Behind scheme successfully targeted lower-achieving African-American and Hispanic students (Zimmer *et al.*, 2007; Mori, 2009).

Educational impact

Unlike most shadows, the shadow education system may affect the body that it imitates. In most settings, it may be assumed, private tutoring supports the mainstream by providing supplementary avenues to learn school-related material. However, in some circumstances it undermines the mainstream. Tutoring schemes sponsored by governments for low achievers are a rather different category from tutoring that is totally driven by market forces, though wide variations of course may be expected within each category. Poisson (2007) highlighted a range of dimensions of educational impact, including the use of school facilities, instructional time, educational content and pedagogy, teacher performance, student learning, and classroom dynamics (see also Dang and Rogers, 2008, pp. 8-14). Examples are presented in the next section.

Government-sponsored schemes for low achievers

Among the participants of the IIEP policy forum was a staff member of England's Department for Children, Schools and Families (DCSF) who reported on a major pilot project launched in 2007 (Taylor, 2007). The 'Making Good Progress' scheme includes focus on one-to-one tutoring as an instrument to support children's learning and to reduce inequalities in educational achievement. As part of their preparation, the architects of the scheme assessed evidence on the impact of private tutoring in England, Australia, and the USA.

The data on England to which the paper referred were chiefly the findings by Ireson (2004) and Ireson and Rushforth (2005). The latter study found (p. 4) that 27 per cent of their sample of Year 6, 11, and 13 pupils had received private tutoring. The researchers observed that the most popular subject was mathematics, followed by English (reading and writing for Year 6), and science. Other key findings included that:

- The main reason for having a tutor was to do well in tests and examinations (two thirds of students).
- Secondary school students sometimes had tutors to help them to keep up with work or to catch up on work that they had missed, perhaps because of illness.
- The quality of tutoring is likely to influence its impact on attainment, and tutoring programmes varied considerably in their effectiveness.
- Tutoring appeared to have little or no impact on General Certificate of Secondary Education (GCSE) results for white pupils, but a much more positive effect on non-white pupils (albeit on a small sample). Combined, the effect was a small positive one. In mathematics, tutoring at GCSE benefited boys more than girls.

Because private tutoring varied to such a large extent, there was little systematic data on what was likely to work for whom and in what circumstances.

Turning to Australia, Taylor (2007, pp. 5-6) highlighted a government initiative to assist children who had not met the Year 3 National Reading Benchmark in 2003. The scheme provided a voucher to enable parents or carers of eligible children to access one-to-one reading tutoring up to the value of Aus\$700 (see also Watson, 2007, p. 6). The scheme was subsequently evaluated by analysis of pre- and post-tutoring reading

assessments, and by data on the perceptions of tutors and parents or carers on the levels of change. In 2003, an estimated 19,000 Year 3 students did not reach the benchmark (7.6 per cent of the national cohort), of whom 6,200 students had joined the scheme and 5,443 students had followed a full course of tutoring. Evaluation indicated that the scheme gave students an opportunity to learn without distraction, thereby improving concentration and focus on learning. It also allowed them to learn without fear of embarrassment, and encouraged self-esteem. Various school-related and family-related ingredients were important to success, which was reported to be significant in some states. In the state of Victoria, for example, 89 per cent of students improved their performance with an average gain in reading skills of nearly 1.7 years. However, it was still a pilot scheme, implying that more experience was required to make robust conclusions. Watson (2007, p. 9) added that insufficient data were available to demonstrate the cost-effectiveness of the scheme compared with other methods of educational intervention.

The third scheme addressed by Taylor (2007, pp. 6-7) was the No Child Left Behind (NCLB) policy as experienced in Chicago. In 2005, Chicago Public Schools (CPS) contracted 30 private companies and agencies to provide services to over 60,000 students in 343 schools at a cost of US\$50 million. Tutoring was provided by both for-profit and not-for-profit agencies. CPS also sponsored its own programme, which accounted for over half of the students tutored. The evaluation showed some gains for pupils who received tutoring compared with pupils who were eligible but did not receive it. The eligible pupils who participated were among the lowest performing. Over one year, students who received tutoring had an average gain of 1.09 years in reading and 0.94 years in mathematics. This was higher than eligible but non-tutored students, who had average gains of 1.03 and 0.92 respectively, but lower than citywide average gains of 1.06 and 1.01 respectively. Taylor identified four major issues from the Chicago experience:

- Tutoring was offered on the basis of eligibility for free school meals, which was primarily determined by economic status, and not academic need. Some pupils who needed tutoring did not receive it, and vice versa. Parents chose which subjects their children were tutored in, and did not always choose well. Tuition companies used advertising and incentives, with some offering high volumes of tutoring which attracted parents but were not educationally beneficial.

- The size of tutoring groups varied significantly. There was some one-to-one tutoring, but most was delivered in groups, some of which had as many as 20 pupils.
- There was no universal evaluation, and little provider accountability. A tutor, rather than the school or any other actor, would be credited with any gain that a child made if the child performed better in the end-of-year examinations. Very few companies sampled or evaluated lessons, and very few were responsive to parental or headteacher concerns.
- Companies who recruited children's teachers as tutors had more impact. Many of these teachers adapted the general materials which they were given to deliver tutoring in order to fit the children's needs. Such tutors commonly had good pupil records, good parental feedback, and the trust of schools.

Taking these findings into account, the pilot launched in England in 2007 was designed to meet the full costs of one-to-one tutoring for 10 per cent of pupils in Key Stages 2 and 3 (children aged 7-11 and 11-14) in 484 schools. This would cover 10 hours of tutoring plus two hours of school or tutor liaison per pupil per subject in English and/or mathematics.

A comparable scheme has been operating in Singapore (Tan, 2009, p. 97). During the 1980s, the government was concerned about racial imbalances in educational achievement, and particularly the poor performance of ethnic Malays compared with Chinese and Indians. The authorities provided financial support to enable the Council on Education for Malay/Muslim Children (MENDAKI) to provide tutoring. The government also permitted the Council to use public schools for after-school tutoring, and trained tutors who worked voluntarily or for low fees. Tutorial schemes were set up first by MENDAKI and then by the Singapore Indian Development Association (SINDA) which have remained very robust and well advertised (see MENDAKI, 2009; SINDA, 2009).

Also worth noting is a parallel scheme in South Africa reported in the IIEP policy forum by Reddy (2007). South Africa's Department of Science and Technology (DST) requested a review of tutoring in order to identify ways to improve learning of science in secondary schools. Following receipt of recommendations arising from the review, the Department decided to embark on a scheme targeting schools serving low-income families. The tutoring was intended to be a face-to-face model,

and the government approached the private sector to assist with funding. The scheme was an illustrative example of a government-sponsored initiative that endeavoured to reduce inequalities and was expected to have an impact on mainstream learning by helping low achievers catch up.

Market-driven tutoring

Other schemes, as will have become evident from earlier sections of this book, exist solely as market-driven enterprises. They are also expected to deliver learning gains, without which demand for them would wither. However, evaluations of these initiatives show that some are based more on impressions and marketing than on demonstrated evidence. Much depends on the nature of the tutoring and on the readiness of pupils to take advantage of it. Moreover, in some settings, the tutoring sector has had a negative impact on mainstream education.

Among the most problematic aspects are cases in which private tutoring becomes a substitute for the mainstream. Especially near the time of major external examinations, schools in some countries may be perceived by pupils to be less able to cater for their specific needs because they have to serve a wide spectrum of demands and also have broader social and political goals. In Turkey, this has reached the extreme of pupils paying to secure medical notes to allow them to be absent from school. Especially during the semester when pupils take secondary and tertiary education entrance exams, they concentrate on attending the private tutorial centres and on their preparations at home rather than attending mainstream classes. Tansel and Bircan (2007, p. 8) reported that at this season “most students receive false medical reports of sickness which enable them to be absent from their mainstream classes” and that this “has become a widely accepted and expensive process”. In 2005, the Turkish Union of Educators conducted a survey of 1,078 senior high school students and 1,073 high school graduates. When asked how preparation for examinations affected school attendance, 55 per cent of the senior high school students and 49 per cent of the high school graduates stated they had sought false medical reports.

Similar patterns are evident in Azerbaijan. Kazimzade (2007) indicated that, especially in the last grade of secondary school, students commonly skip classes to attend private tutoring lessons during school hours (see also Silova and Kazimzade, 2006, p. 128). Some students even pay bribes to the school authorities to be excused from school – but still

marked as present in school registers – so that they can attend the private lessons. Echoing the remarks of Obeegadoo (2007) with reference to Mauritius, Kazimzade observed that at this season school classrooms are practically empty because most pupils are receiving out-of-school tutoring.

The intensity of private tutoring may also of course affect pupils' concentration spans. In Korea, Kim (2007, pp. 16-17) reported on the effect of tutoring for the entrance to special purpose high schools (SPHs). The tutorial centres are widely perceived by the pupils as offering training that is more relevant. Since the demands of the tutorial centres are heavy, students commonly sleep during school time. The pupils themselves recognize this (Kim, 2007, p. 17):

School teachers do not like SPH applicants. They do not concentrate on class and sleep instead. Grades of the second semester of third grade are not counted by SPH. So the teachers do not like them because those students mess up matters during class ...

SPH applicants are all high achieved. They do not study hard in class. It makes mess in class ... Actually many of them sleep during class or do private institute homework or study other things in need ... In English class, most of them [SPH applicants] are sleeping. We already learned the content. And teachers know it.

The above quotations raise issues not only about concentration spans but also about diversity within mainstream classrooms. When tutoring assists low achievers, it usually reduces the diversity and in this respect assists the mainstream teacher. However, much market-driven tutoring serves high achievers. As explained with reference to Mauritius (Bah-lalya, 2006, p. 75):

When some pupils [receive] private tutoring but others do not, mainstream teachers may face great[er] disparities than would otherwise be the case. While supplementary tutoring can enhance learning of regular lessons, it can detract from learning and teaching during the normal school hours.

Among the challenges may be that the pedagogy of private tutors differs from that of mainstream teachers. In mathematics, for example, pupils may learn in tutoring centres to solve problems mechanically, rather than through understanding the mathematical principles concerned. In the USA, the No Child Left Behind scheme has been criticized for its lack of requirement to coordinate supplementary services with the classroom

curriculum. Critics add that providers have not been required to communicate with classroom teachers, with the result that the tutoring services “weaken the organizational capacity of schools to develop a coherent instructional program” (Sunderman, 2006, p. 118).

Perhaps even more problematic are situations in which teachers neglect their mainstream classes because they know that pupils will receive tutoring – in many cases delivered by those teachers themselves. Hartmann (2008: 52) recorded the perspectives of a pupil in Egypt whose private chemistry tutor was also her regular teacher:

At school, Dina says, students talk during classes or study for other subjects. “Nobody pays attention. So the teacher doesn’t bother to teach the whole lesson. He might just explain the subject matter very superficially, without going into any details. He knows that we are all taking private lessons, so why should he bother?”

Hartmann also noted (p. 67) that many tutors earn additional income from the textbooks that they have written. These books are commonly available in the marketplace and in bookshops, but are forbidden in the schools because they have not been officially sanctioned and may undermine the pedagogical approaches preferred by the curriculum development authorities.

Other dimensions of the impact of tutoring will become evident from the three case studies presented in the following section. Meanwhile, it is useful to reproduce Poisson’s summary of possible relationships between private tutoring and mainstream education (*Table 10*).

Table 10. Impact of private tutoring on mainstream education

Domains of impact	Types of impact	
	Positive	Negative
Education financing	<ul style="list-style-type: none"> • More resources globally allocated to the education sector 	<ul style="list-style-type: none"> • Diversion of funds that could be more efficiently used by mainstream actors • Pressure exerted by teachers on parents to pay for private tutoring • Deprivation of the state of tax revenue
Teacher revenues	<ul style="list-style-type: none"> • Additional income for teachers 	
Teacher management		<ul style="list-style-type: none"> • Distortion of management procedures (pressure to allocate the jobs that will guarantee the most money)
Use of school facilities	<ul style="list-style-type: none"> • Improved rate of use of school facilities outside school hours 	<ul style="list-style-type: none"> • Use of public facilities for private interest
Instructional time	<ul style="list-style-type: none"> • Better use of out-of-school time (including for under-supervised youth) 	<ul style="list-style-type: none"> • Reduction of the total number of teaching hours (teacher absenteeism) • Focus on private tutoring rather than remedial classes under the charge of teachers
Educational content and pedagogy		<ul style="list-style-type: none"> • Only part of the curriculum taught during official hours • Borrowing of the cramming approaches used by private tutors
Teacher performance	<ul style="list-style-type: none"> • Reduction of the workload of mainstream teachers 	<ul style="list-style-type: none"> • Teachers making less effort in class to ensure that every pupil is adequately prepared • Fatigue and inefficiency of teachers providing tutoring lessons • Teachers neglecting their mainstream duties in favour of tutorial work (absenteeism)

Domains of impact	Types of impact	
	Positive	Negative
Student learning	<ul style="list-style-type: none"> • Help pupils to understand the materials presented during the ordinary school day 	<ul style="list-style-type: none"> • Heavy workload and student fatigue • Lack of interest in classroom activities • Pupils working mechanically, using the tips given during private tutoring lessons • Increased rate of student absenteeism
Classroom dynamics	<ul style="list-style-type: none"> • Help slow learners to keep up with the rest of the class 	<ul style="list-style-type: none"> • Private tutoring becoming more important than the synergistic classroom experience • Teaching and learning approaches used by teachers inconsistent with those of tutors • Lack of respect for mainstream teachers • Mainstream teachers facing greater disparities within their classrooms
Assessment and selection procedures		<ul style="list-style-type: none"> • Requirements for examinations raised to justify tutoring • Skewing of the university admission process
Student achievements	<ul style="list-style-type: none"> • Better results of under-achievers • Improve student learning and competitiveness in the educational market 	<ul style="list-style-type: none"> • Increased social inequalities between students • Widened gaps when high achievers receive extra tutoring • Favouritism of pupils receiving private tutoring • Penalization of pupils who do not attend private tutoring (deliberate failing)
Textbook production and distribution	<ul style="list-style-type: none"> • Encourage the production of new materials, that is user friendly and helpful to prepare for exams 	<ul style="list-style-type: none"> • Introduce cramming approaches in content of textbooks

Source: Poisson (2007), pp. 14-15.

Three case studies

Examination of particular national experiences illuminates the complexities of the topic. Many countries could have been chosen for case studies, but for reasons of length the focus here has been restricted to three. Korea has been chosen because large-scale private tutoring has a long history, and successive governments have tried various policies to address the issues – arguably with limited success. Mauritius has in some respects a similar history, but is an instructive contrast to Korea because the population is smaller and both the culture and the dominant types of tutoring are different. France has been chosen since its government has established structures to encourage private tutoring, and significant developments are more recent.

Korea

Seth (2002, p. 1) described education in Korea as a “national obsession”. His study of what the Koreans sometimes call their “education fever” (see also Lee, 2005) shows that education has been a major instrument of economic and social change and that, especially since the middle of the 20th century, private tutoring has been a significant component. As noted during IIEP’s policy forum by Kim (2007, p. 1), 63.1 per cent of high school students were estimated to be receiving private tutoring in 2007. At the junior high school level the proportion was 78.4 per cent, and at elementary level as high as 88.2 per cent. Korean tutoring takes various forms. For example, at the middle school level in 2007, 45.5 per cent of pupils were in private institutes known as *hakwons*, 25.4 per cent received individual or group tutoring, 10.4 per cent operated with worksheets provided by companies and supervised by family members perhaps with occasional inputs from tutors, and 5.0 per cent received tutoring online (Kim, 2007, p. 7). Total household expenditure on tutoring was estimated in 2006 at the equivalent of US\$24 billion (Kim and Lee, 2008, p. 3). This represented 2.8 per cent of Gross Domestic Product, and was equivalent to 80 per cent of government expenditure on public primary and secondary education.

These figures are viewed by both government officials and the general public with considerable ambivalence. Kim (2007, p. 1) pointed out that:

Private supplementary education is one of the most vexing issues in ... Korea. It has been accused of increasing [the] economic burden of parents, widening inequality between the rich and the poor, distorting

school curriculum, degrading authority of school teachers, and harming students' balanced development.

At the same time, demand for tutoring from families is both huge and sustained. At the end of the Second World War, when Korea achieved independence from Japanese colonial rule, illiteracy was high and the country was very poor. Four decades later the country had achieved industrial transformation and was able in 1996 to join the Organisation for Economic Co-operation and Development (OECD) – aptly described as a “rich man’s club” of advanced economies (Henry, Lingard, *et al.*, 2001, p. 7). Seth (2002, p. 3) observed that the education system, including the emphasis on private tutoring, was a significant ingredient in this success, not least because of “its stress on teacher authority and intense competitiveness, driven in part by very competitive school entrance examinations, [which] produced a workforce that was highly literate and disciplined and a society ready for the competition characteristic of a capitalist industrial regime”.

Examination dominance and attempted reform

During the centuries leading up to Japanese colonization, Korea had a strong tradition of civil service examinations which controlled access to government ranks and conferred great prestige on the few who were able to enter through the narrow gate (Zeng, 1999). The system was modelled on that of China, and was allied to the traditions of Confucianism in which formal learning and scholarship play major social roles. The modern system of examinations, however, was a 20th century creation of the Japanese colonial era and was retained by independent Korea with only minor modifications. During the 1950s, important watershed examinations were held for entry to middle schools, high schools, and universities. The first of these were particularly important, placing severe pressure on elementary school students. Some schools began to organize special fee-paying classes in the evenings and at weekends, and after-school cram sessions became important sources of income for both schools and teachers.

This practice of extracurricular preparation for examinations was widely criticized for the stress it created for children, the financial burden on parents, and the way that it exacerbated social inequalities. Multiple directives from the Ministry of Education ordered an end to the practice. In a 1955 decree President Rhee Syngman noted that many schools and teachers had profited from “the ill balance between the number of

applicants and the schools' capacity", and declared that in future such practices, including extracurricular classes, "would receive the full penalty of the law" (Seth, 2002, p. 143).

However, these prohibitions did not have great effect. The authorities therefore embarked on a further step to reduce supplementary tutoring through reform of the systems for selecting pupils at different steps on the educational ladder. Among the most significant moves, introduced in Seoul in 1969, in other major cities in 1970, and in the remainder of the country in 1971, was the replacement of the middle-school examination by a random lottery (Kim, 2004, p. 9). The reform aimed to:

- permit the normal development of children by reducing stress;
- prevent elementary schools from focusing excessively on preparation for the middle-school examination;
- discourage private tutoring;
- narrow the gaps between different middle schools;
- reduce the financial and psychological burden on households.

The measures were accompanied by expansion of enrolments in order to achieve the national goal of providing all pupils with nine years of compulsory education.

The reform was partially successful, at least in the short term, but created other problems. Schools found that they had greater variations in learning levels among their intakes, and teachers had to adjust their methods accordingly. Abolition of the middle-school examination and expansion of enrolments meant that the watershed was simply transferred to the next level. Pupils who had both talent and ambition felt that their needs were not being met adequately in the mixed-ability classes of middle schools, and resorted to private tutoring to prepare themselves for the high-school examination.

Seeing this pattern emerge, in 1974 the authorities launched a further lottery system to allocate high school places. Introduced in Seoul and Pusan, by 1980 the policy was enforced in 20 cities, and by 2003 covered 73 per cent of general high school students (Kim, 2004, p. 9). A plan was announced in 1982 for an exceptional track of special purpose high schools to serve gifted students who would focus on science, foreign languages, athletics or other domains. This was in response to criticism that the lottery system caused mediocrity. In 2007, these special purpose high schools served 4.2 per cent of all secondary pupils (Kim, 2007, p. 3).

Once again, the chief effect of the abolition of the competitive examination at the high school level was that the watershed moved upwards to the university entrance examination. Indeed, the examination at this level became so important that it had a strong influence at lower levels. Seth (2002, p. 157) noted that the starting point for college preparation “began to move to lower and lower levels until most children began their private lessons and after-school classes in primary school, if not earlier”. The abolition of the middle and high school entrance examinations also meant that it became more important than ever to reside in school districts with prestigious institutions. Schools in certain districts gained reputations for greater success rates in college entrance, leading to rises in property prices. Reputations then became self-fulfilling, because the districts became enclaves of prosperous families who could easily afford private tutoring.

Renewed attempts at prohibition

In 1980 when Chun Doo-Hwan took power as head of a new military government, an estimated 12.9 per cent of elementary school pupils, 15.3 per cent of middle school pupils, and 26.2 per cent of high school pupils were receiving private tutoring (Kim, 2007, p. 1). Determined to tackle the issue, President Chun transferred control of the college entrance examinations from individual institutions to a new state-controlled College Entrance Achievement Test. He prohibited both extra high-school classes and private tutoring in academic subjects. This was the most radical measure to date. The only private tutoring permitted was in athletics, art, music, taekwondo, and flower arranging.

Again, however, the prohibition proved very difficult to enforce. Seth (2002, p. 186) recounted that:

Parents went to great lengths to avoid the regulations against private tutoring. College student tutors sometimes dressed up in high school uniforms in order to enter the apartments of their students without drawing suspicion. Some families rented out apartments to tutors so that they could offer lessons to the children of one or more families without drawing the attention of the apartment watchmen. Resorts and hotels, as well as condos, often housed secret cram schools. The rich sent children abroad for tutoring.

The risks increased the costs, and secret tutoring became a lucrative occupation.

Recognizing the need for compromise, the government gradually relaxed the ban (Yang, 2001):

- In 1984, senior high school students were allowed to attend private foreign language institutes during winter holidays. Students with lowest learning achievement (the bottom 20 per cent) were allowed to have extra lessons in school from teachers.
- In 1988, extra lessons for every student were permitted in schools, with mainstream teachers providing them to their own pupils on a fee-paying basis.
- In 1989, university undergraduates were allowed to tutor primary and secondary students, and study-aid tapes could be produced, purchased, and rented. Primary and secondary students were allowed to attend private institutes for academic lessons during holidays.
- In 1991, primary and secondary students were allowed to go to private institutes for academic lessons during school terms.
- In 1996, university graduates were allowed to tutor students in primary and secondary schools.

This easing of restrictions facilitated rapid growth. In 1993, nationwide expenditure on private tutoring was estimated at 3,410 billion Won (US\$4.3 billion). This figure was said to have grown to 4,696 billion Won in 1994, and 9,320 billion Won in 1995 (Yoon *et al.*, 1997, p. 1). By 1997, average annual tutoring fees for elementary, middle, and high school students were estimated to equal 12 to 16 per cent of per capita Gross National Product, three to four times the level in Japan (Kwak, 1999). Tutoring was strongest at the elementary level, and was especially visible in the cities but also significant in rural areas.

Partly because of such escalation, in 1997 the issue of prohibition again came onto the political agenda. President Kim Dae-Jung declared in his 1998 inaugural address that he would “free young people from extracurricular activities and relieve parents from the heavy monetary burden of private tutoring” (quoted by Yi, 2002, p. 2). The government announced in 1998 that extra academic tutoring for secondary students would again be banned by stages: in 1999 for lower secondary school students and first-year high school students, and in 2001 for every secondary school student.

However, this move was greeted with considerable scepticism. Critics argued that tutoring could only be tackled effectively by making it unnecessary – by reducing the competitive advantages to be gained through

tutoring, and by improving the quality of mainstream schooling. An editorial article in a mass circulation publication (*Asiaweek*, 1997, p. 20) suggested that:

For Korean authorities to address their own shortcomings in primary and secondary education by banning tutors is a bit like trying to eliminate robbery by ensuring that the entire population is poor. In an increasingly competitive Asia, it makes no sense at all to legislate in favor of the lowest common denominator.

This renewed attempt at prohibition got no further than its predecessors. In 2000, the courts declared the prohibition unconstitutional and an infringement of human rights.

Trying alternative tactics

Faced with this history, the Korean authorities decided to take a broader approach and in 2004 launched an initiative entitled 'Policy for Reduction of Private Tutoring Expenditure through the Restoration of the Public Education System'. It sought to improve public satisfaction with state education at all levels, recognizing that the attempt to ban tutoring addressed only the symptoms rather than the causes. Ten specific measures were announced (Kim, 2004, p. 22):

1. education through e-learning programmes or preparatory courses for the College Scholastic Ability Test (CSAT) through the Educational Broadcasting Service television channel and the Internet;
2. schools allowed to hold different levels of supplementary lessons after school hours based on scholastic performance;
3. enriched extracurricular activities;
4. after-school classes for young elementary school students with working parents unable to afford to send them to child-care centres;
5. recruitment of professional teachers and adoption of a diversified teacher evaluation system
6. changing teaching and assessment methods;
7. changing the high school equalization policy by creating a system of instruction based on student proficiency by separating students into different classes;
8. changing the college entrance system to prioritize high school records and extracurricular activities while reducing its focus on CSAT scores;
9. ensure a minimum level of educational achievement;
10. remedy the society and culture.

Some of these measures reversed or significantly modified earlier reforms. The modification of the college entrance system to increase emphasis on recommendations from schools and on extracurricular activities tellingly contrasts with measures elsewhere to reduce corruption by strengthening centralized examination systems and standardizing assessment criteria (Gorgodze, 2007). Seeking to claim some features of the private tutoring system for the mainstream, the new plan included hiring renowned cram-school lecturers to offer free lessons in core subjects via satellite television and the Internet (Lee, 2007, p. 1228).

Also significant was the shift in the high school equalization policy. It had seemed both logical and attractive when introduced in 1974, and is the sort of measure which might, at least at first sight, appeal to governments in other countries. It is thus ironic to read the remarks by evaluators such as Kim and Lee (2008, p. 29) that the policy could be “directly blamed for the high demand for private tutoring”. Other evaluators (e.g. Byun, 2008) have more nuanced assessments. It is clear, however, that the policy was not straightforward in its implementation and impact.

Table 11. Percentages of pupils receiving private tutoring, Korea, 1980-2007

	Elementary school	Middle school	High school
1980	12.9	15.3	26.2
1997	72.9	56.0	32.0
2007	88.2	78.4	63.1

Source: Kim (2007), p. 1.

In contrast to these specific components on the list of 10 was the last, “remedy the society and culture”, which was very general and difficult either to define or to enforce. The competitive spirit and respect for education in Korea is deeply engrained and cannot be readily modified. Thus, tutoring has grown exponentially despite the efforts of successive governments (*Table 11*). The number of tutoring institutes (*hakwons*) increased from 381 in 1980, to 14,043 in 2000, and 31,000 in 2007 (Kim and Lee, 2008, p. 9). Spending on private tutoring has continued to rise faster than the growth in incomes (Kim and Lee, 2008, p. 3). Nevertheless, the Korean authorities continue to address the matter with vigour. Lee and Jang (2008, p. 15) rightly pointed to the need “to be patient and approach the problem with a long-term perspective” which has a “multifaceted and comprehensive approach”.

Box 3. Managing the pressures

The Korean government has created a group of special purpose high schools which are exempt from the school equalisation policy. Competition to enter these schools is naturally intense, and private tutoring is inescapably part of it. Kim (2007) studied the ways that different families manage the pressures. Here are the perspectives of a girl named Da-jung and her mother. This passage describes a particularly intensive period in Da-jung's life; but related pressures, albeit less intensively, characterise the lives of millions of Korean children every day throughout their school careers.

Da-jung registered in a private institute for two months before the entrance examination for the special purpose high schools, and studied Korean, English and Mathematics. She went to the private institute around 5 pm after school, and attended classes until 10 pm. She stayed until 2 am in the institute's self-study room, and then returned home. She went to sleep around 3 am, got up 6 am, and went to school.

Da-jung's mother recounted how little she slept:

She got up as soon as I woke her. I felt very uncomfortable about waking her. When I didn't wake her at 6.00 since I felt sorry for her, she got angry. She told me: "You have to be strong. Even if it is so difficult for you, you have to wake me up. That is for me. You have to shake and even hit me to wake me up."

Yet while Da-jung's mother felt that her daughter's life during the period was too tough, she regarded private tutoring as an investment. This conviction was reinforced by meeting other mothers and hearing about the tutoring that their children received.

For Da-jung, the tutoring institute enabled her to expand her perspectives. Da-jung experienced competition there, and studied harder. However, her study in the private institutes resulted in neglect of her school education. Because she was at the institute until 2 am, she often slept in class at school

Source: Kim (2007), pp. 7-8.

Mauritius

Like their counterparts in Korea, the Mauritian authorities have long sought to address problematic aspects of private tutoring but also with limited success. IIEP's policy forum brought together two former Ministers of Education in Mauritius: Armoogum Parsuramen (1983-1995) and Steven Obeegadoo (2000-2005). In the political field they had been on different sides, but during the policy forum they were united in declaring the difficulty of finding workable policies to address private tutoring. They added that the challenges that they had faced had equally been faced by their predecessors and successors.

Indeed, in Mauritius the challenges of private tutoring have been noted for over a century. Foondun (2002, p. 488) quoted a 1901 statement by the head of what was then the only state secondary school for boys, who identified negative dimensions of tutoring but “felt helpless” to prevent it. Similar remarks were made in 1911 by the head of Mauritius’ Royal College at Curepipe (quoted in Mauritius, 1994, pp. 1-2), who complained that 12 of his staff were giving 13 to 33 hours of private tutoring per week. He continued:

To interdict the practice altogether is impossible unless adequate compensation is granted, nor do I think such a measure desirable. Gentlemen have a right to utilise their leisure out of the college hours as they think fit and I do not see who can stop them. It seems to me equally impossible to impose a limitation. How could it be enforced? Members may say with much force that their actions cannot be controlled after office hours. I quite admit the evil, but I am unable to suggest a satisfactory solution.

Three decades later, the author of a 1941 education report argued that teachers could not be efficient in their work if they were doing two extra hours of teaching every night from Monday to Friday. The report (quoted in Mauritius, 1994, p. 2) added:

If the ... working day is not long enough, it can be lengthened. Private coaching for the mass of the class is unnecessary; and such coaching for the few backward boys as is necessary should be by the class teacher as part of the duty for which he is paid a salary.

Armoogum Parsuramen’s leadership (1983-1995)

Armoogum Parsuramen presided over a period of growing concern about private tutoring, and expressed determination to address the issue. A White Paper produced at the outset of his tenure (Mauritius, 1984, p. 15) stated that:

Government is concerned at the abuse of private tuition – especially in the primary schools. Children whose families cannot afford to pay for private tuition may be placed at a disadvantage from the beginning of their school lives. Government proposes to carry out a thorough investigation into the extent of private tuition and its effects on the schools. Clear guidelines will be laid down in the light of the results of the study. But the main emphasis in the campaign against the harmful effects of private tuition must be on the improvement of the quality of teaching within the schools. If the teachers carry out their

normal tasks fairly and conscientiously, the demand for private tuition in the primary schools should diminish very substantially.

The investigation was in due course commissioned from a team at the University of Mauritius. It found that in 1986 the proportion of primary school children receiving tutoring rose from 11.2 per cent in primary Standard (Grade) I to 72.7 per cent in Standard VI. The proportion dropped to 37.3 per cent in secondary Form I, but then rose to 87.2 per cent in Form VI (Joynathsing, Manzoor, *et al.*, 1988, p. 31 and p. 43). The rise towards the end of primary reflected the importance of the Certificate of Primary Education (CPE) examination, which was the gateway to the secondary school system. Once past this gateway, the proportion of pupils receiving private tutoring dropped until the School Certificate and Higher School Certificate examinations approached. Mauritius' secondary school system was highly stratified, and the intensity of private tutoring at the primary school level was fuelled by what Foondun (1992) called "the mad race for a place in a 'five star' secondary school". The more academically able the students, the more likely they were to receive private tutoring.

The location of tutoring tended to vary by level. Most tutoring at primary level was provided by teachers themselves in the school premises, and the pupils found themselves under strong pressure to take the tutoring. At the secondary level, tutoring was commonly provided by specialist subject teachers who were not necessarily from the pupils' own schools. The tutoring might be provided in the teachers' homes for small groups or in rented premises for large groups. Mauritius had few institutes comparable to the Korean *hakwons*.

The University of Mauritius study did not make clear proposals, but observed (Joynathsing *et al.*, 1988, pp. 64-66) that:

- The prevalence of private tutoring was part of a self-reinforcing system. It was widely believed that classroom teaching was insufficient for doing well in examinations, with the result that pupils sought private tutoring. But many teachers who assumed that their pupils received tutoring made less effort in class to ensure that every pupil was adequately prepared for the examinations. Thus, the need for private tutoring became a self-fulfilling prophecy.
- Once private tutoring was structurally embedded in the system, powerful vested interests desired to maintain it. Parents saw tutoring as a road to their children's social and economic advancement, teachers saw tutoring as a source of untaxed income, and the general

public saw tutoring as a way to improve educational performance at no cost to the taxpayer. For all these reasons, proposals to reduce the extent of tutoring were unlikely to be effective unless accompanied by radical measures to improve in-school teaching.

- It might be possible to reduce the demand for private tutoring by changing the parameters within which the education system worked, e.g. by making examinations tests of ability rather than of acquired knowledge, or by encouraging employers to hire primarily according to aptitude tests rather than on academic qualifications. However, reform could only succeed if it was based on social and economic reality. Reform had to be consistent with the desires of parents and pupils, and with the realities of the job market. Any imposed solution which ignored these factors would be doomed to failure.

Parsuramen, as Minister of Education, succeeded in bringing the University of Mauritius study to the attention of Parliament where, in 1988, it sparked vigorous debate. Parsuramen highlighted the excessive study hours for children, the “appalling physical conditions” in which tutoring was provided, including teachers’ garages and similar locations, and the fact that low-income families were penalized. The Prime Minister took up the theme, and suggested that Parent-Teacher Associations (PTAs) could help achieve a more balanced approach in the interests of the children. He also highlighted the need to reduce the bottleneck at the end of the primary cycle by expanding secondary provision, and raised the possibility of banning private tutoring for pre-primary children and up to Standard III. He suggested that politicians could set a good example by not sending their own children for private tutoring

For the wider public, the government organised a National Workshop on Private Tuition. Since Mauritius was a compact country with a population of only one million, the workshop was able to have a high degree of representation including from parents’ groups and teachers’ unions. At the same time, the event showed the extent to which tutoring had become engrained. In the light of this, in 1989 the Minister decided on a set of regulations (Parsuramen, 2007) to:

- prohibit tutoring up to Standard III in order to help protect the health of young children;
- review the timetable for the lower standards, in particular to increase the time for civics, creative and movement education, and reading;

- permit the use of classrooms for tutoring in Standard IV, V and VI in order to allow the activity to be conducted in an appropriate environment rather than in crowded conditions in teachers' homes or rented premises;
- restrict maximum private tutoring class sizes to 40 pupils and pupils' time for tutoring at 10 hours per week.

The next step was for these regulations to move to legislation. During presentation of the bill in Parliament in 1991, Parsuramen stated that teachers would be asked to admit pupils who could not pay tutoring fees, and that he planned to introduce a Code of Ethics and a Teacher's Council to support the measures. During the debate, opposition members highlighted the risk of creating a category of teachers in Standards IV to VI who were permitted to provide tutoring while teachers in Standards I to III were not. They also argued that continued tolerance of tutoring in Standards IV to VI was "highly condemnable" because it maintained a parallel system of education. The Minister adhered to his own viewpoints, and following debate the legislation was approved (Parsuramen, 2007).

A parallel event in the same year was release of a report on the determinants of primary school performance with special reference to failures in the CPE examination (Manrakhan, Vasishtha, *et al.*, 1991). The report noted that although tutoring was an economic burden for many parents, a considerable number sought it in order to ensure that their children secured places in good secondary schools. Nearly 70 per cent of CPE candidates were said to receive tutoring, ranging from 2 days to 5 days a week. Most children (88 per cent) received help from one tutor, 9 per cent from two tutors, and 3 per cent from three tutors. Ninety per cent of children who passed the CPE examination had received private tutoring, while half of those who failed had not.

With such data, and following up the Minister's push for parental sensitization, the government issued a pamphlet entitled *Use and Abuse of Private Tuition* (Mauritius, 1994). This pamphlet summarized the policies which in effect used a combination of regulation, facilitation, and request. The prohibition of tutoring in Standards I-III and the limitation on the number of weekly hours and class size were part of regulation. The facilitation lay in approval of the use of school premises for private tutoring. In addition to ensuring that children did not suffer from taking classes in educationally unsuitable environments, the measure provided venues in which the authorities could check compliance with the

regulations. The request contained in the policy was an appeal to teachers not to discriminate against low-income students.

As complementary measures, the primary and CPE examination syllabuses were revised, and subject teaching was introduced in Standard IV to reduce the dependency of pupils on single teachers. Headteachers and inspectors were instructed to report on teachers who discriminated against pupils not taking tuition, and further efforts were made to reduce disparities between secondary schools and thus the competition to get into the 'five-star' institutions.

The regulations were chiefly targeted at teachers who provided supplementary tutoring for the pupils for whom they already had responsibility in mainstream classes. However, prohibition of such practices is easier than preventing any form of tutoring, and ambitious parents of children in Standards I to III continued to employ independent tutors. Also, as feared by some parliamentarians, the prohibition in Standards I to III exacerbated the stratification within schools because, in the words of a Mauritian newspaper (*L'Express*, 20 June 1993, quoted by Foondun, 2002, p. 506), teachers of the lower grades were "denied a share of the juicy cake of private tuition". The result was intensification of lobbying within schools to determine which teachers could take the higher classes. A 1994 UNICEF report stated (p. 35) that:

It is common practice at the beginning of Standard IV for the teacher to send a note to the parents announcing the beginning of private tuition by himself or herself to his/her own pupils. Teachers known as *faiseurs de boursiers* (scholarship-makers) are much sought after for private tuition. Naturally, parents with financial means can afford to buy individual private tuition from the best teachers. Thus, an egalitarian, free educational system in a democratic society becomes in practice an elitist system in which results and high-quality teaching are on sale for a price.

Parsuramen concluded his lengthy career as Minister of Education in 1995. Despite his sustained efforts, he lamented two years later (Parsuramen, 1997, p. 51) that "the problem is still there". He waited to see what new measures his successor would take "to deal with this complex issue".

Kadress R. Chedumbarum Pillay Takes the Lead (1997-2000)

Parsuramen's successor was James Burty David. He stayed in office for only a year and a half and did not address the matter of tutoring.

However, his own successor did so. This was Kadress R. Chedumbarum Pillay, who maintained concern about private tutoring and stratification in the education system. He sought longer-term structural reforms including continued efforts to reduce the extent to which some institutions were considered ‘five-star’ schools while others were only seen as second or third best. A parallel measure endeavoured to reduce the disparities between primary schools, so that pupils could be assured of more equal chances at the CPE examination. These measures were set out in a 1997 White Paper, which stated (Mauritius, 1997, p. 28) that private tutoring was “the direct result of the super competitive education system, the lack of a teacher development scheme, the inability of the conditions of service of teachers to attract the best talents, and the total absence of a quality assurance framework”. The White Paper avoided what it called drastic solutions, instead considering that the problems of private tutoring would dissipate in the context of wider educational reforms. Nevertheless, the document did envisage (pp. 28-29):

- prohibiting private tutoring on school premises;
- requiring teachers to submit returns on tutoring indicating the number of hours, number of students, frequency, time and location;
- prohibition of tutoring during weekends and on public holidays;
- expecting teachers to provide remunerated remedial classes after school hours;
- revision of the status of teachers;
- tight monitoring of teachers’ performance by the inspectorate to ensure strict attainment of targets and standards;
- development of media materials and use of email to assist parents to complement class work;
- impressing on parents and the community the negative impact of private tutoring;
- use of evidence on non-compliance at the time of consideration of teachers’ promotion possibilities;
- strict respect for a new Students’ Rights Charter.

Among the contrasts with previous policies was the use of school premises. As noted, under the earlier regime, policymakers permitted tutoring in schools on the grounds that it would place the practice under the light and remove the dangers of large classes being held in homes or other inadequate premises. A further objective was to remove the risks for small children travelling from school to the tutoring locations. Pillay endeavoured to reverse this policy, arguing that it represented an abuse of public facilities

and increased the likelihood that teachers would pressure their pupils to take tutoring because the pupils would have less possibility of escape.

However, Pillay found that his efforts provoked controversy even within government itself. He found himself at odds with other ministers and senior personnel who were responding to the pro-tutoring pressure of public opinion. Ultimately, the colleagues prevailed: Pillay went on an overseas trip, and during his absence the Cabinet overturned the policy.

Renewed efforts under Steven Obeegadoo (2000-2005)

Steven Obeegadoo's period of leadership began with dimensions that resembled the concerns of his predecessors. One indicator of this similarity was a policy document evocatively titled *Ending the Rat Race in Primary Education* (Mauritius, 2001). The document again called attention to the competition to secure a place in the star schools, stating (p.3) that the system was "exerting immense psychological pressure on both students and their parents and perverting the very function of the school within society". A package of reforms was launched (Obeegadoo, 2007, p. 4):

The number of State secondary schools was doubled, elite secondary schools transformed into VIth Form Colleges and admissions to the secondary schools effected on the basis of residence so as to do away with the high stake examination at the end of primary schooling. At the same time, the school day was extended thus restricting time available for [tutoring] and all teachers offered a special salary allowance. In addition, educational action zones were set up with a provision for free supplementary tuition for low performing (and poorer) children.

However, the government encountered opposition and inertia in this process. One example, which Obeegadoo explained during the IIEP policy forum, concerned the legal system. Being himself a barrister, Obeegadoo was keen to make use of the legal system. He received many complaints from parents, and eventually found one who was willing to take an offending tutor to court. However, the case took two years, and ultimately the Director of Public Prosecutions decided that there was no case to answer.

Another dimension of the inertia concerned Obeegadoo's own colleagues. Having worked hard to devise a system to reduce tutoring, he could not understand why progress was so slow. Eventually he realised that his own advisers in the Ministry of Education and Scientific Research were themselves providing tutoring and thus benefiting from the system as it was. These advisers had come up through the system as teachers,

principals and then Ministry officials, and thus had reputations which allowed them to command good prices as tutors.

A contrasting case highlighted by Obeegadoo during the IIEP policy forum was a teacher who did not want to provide tutoring because he felt that he had better things to do with his spare time. The parents became angry because they felt that their children needed tutoring and that the teacher was being irresponsible to refuse to provide it. As a result, this teacher had to be transferred to a different school. Such incidents, Obeegadoo explained, were common.

Although no data were available, Obeegadoo claimed that the demand for tutoring in primary schools did drop as a result of his measures. However, it clearly remained high. A review of the education system reported (Bah-lalya, 2006, p. 75) that:

Respondents interviewed indicated that children and parents feel that the child will lose out on the curriculum if they do not participate [in private tutoring]. Apparently the more successful teachers have also marketed their knowledge and produced textbooks that pupils are encouraged to buy as part of private tutoring. It is reported that teachers can more than double their salaries with private tutoring and the royalties earned from their books. One consequence is that the Ministry and the headteachers have little or no access to teachers after school hours for in-service, parent meetings or other related activities outside school. Teachers also strongly resist any innovations or reforms that affect their time and involvement in private tutoring. Pupils are reluctant to engage in after-school activities. In short, supplementary tutoring can fall into the trap of being parasitic and wasting financial and human resources that could be better used elsewhere.

Yet despite these obvious problems, and the efforts of Steven Obeegadoo, the vested interests remained strong. As Obeegadoo reported during the IIEP policy forum, the reforms of his era which had proved controversial were subsequently reversed, with the result that private tutoring was given a new impetus.

What to try next?

Steven Obeegadoo was replaced in 2005 by Dharam Gokhool. Although he came from a different party and had challenged the policies of his predecessors, Gokhool was not easily able to find alternatives. On the question of the location for tutoring, teachers were again permitted to use school premises but were supposed to pay for the service (Bah-lalya,

2006, p. 94). Gokhool recognized (2006, pp. 4-5) that private tutoring “vitiates the very process of learning” and “defeats the whole purpose of education”. His solution was again to tackle the curriculum, and the CPE in particular, though at least some members of the public (e.g. Mahadeo, 2008) recalled the history, queried why the process was taking so long, and expressed scepticism about the ease with which the goals could be accomplished.

Especially pertinent to the theme of this book was an article in the Mauritian press which indicated awareness of IIEP’s policy forum and its resonance with ongoing concerns (Etienne, 2007). Beginning with the IIEP event, the article observed that a “number of education experts had gathered in Paris ... to discuss what many people call the ‘necessary evil’ [of private tutoring]”. The theme of the policy forum was considered “particularly relevant to the Mauritian context”, where tutoring had become “a real scourge with pedagogic and economic implications”. The article went on to note that:

The problem with private tuition in Mauritius is mainly that it is everything except private. Instead of being a place and moment where children are in small groups and can ask questions about what they learnt in class, it is often a place where they are crammed with forty or so other students in a teacher’s garage. Private tuition is supposed to be made for pupils who have difficulties in a specific subject and needs reinforcement by a teacher who has time and patience and who deals with two or three children at one time. In Mauritius, most tuition classes are miles away from this model ...

Only a total revamping of the system will help decrease or abolish private tuition in its present form. For the moment, it is a vicious circle where parents do not dare not to send their children for private tuition since nearly every other parent sends his. One child will thus be disadvantaged if he/she does not go for private tuition. Moreover, some teachers might not be doing their best in class because they know pupils will catch up in private tuition sessions.

A blueprint for such revamping was set out by Gokhool’s successor as Minister, Vasant Bunwaree (Mauritius, 2008). The document highlighted (p. 39) “the fierce competition that defines the education sector”, and stressed the need for conceptual changes in the nature of education and the modes of assessment. The report set the objective (p. 12) of “a gradual movement towards the elimination of the necessity of private tuition, the practice of which will be allowed only in the third cycle of the primary sub-sector (i.e. Standards V and VI) for a period of

time”. Some achievements were reported through the system of *Zones d’éducation prioritaires* (ZEPs), which aimed to combat social inequalities through positive reinforcement in less developed regions. The report recognized that progress had been slow in terms of pupil achievement as measured by examination pass rates, but highlighted good practices in holistic educational approaches, school community partnership, and active parental involvement. Related interventions aimed to reduce dependence on tutoring by making schools “true institutions of learning” (p. 85) through professional development of teachers and reform of curriculum.

Following up this document, Minister Bunwaree announced in 2009 that private tutoring would be prohibited for pupils up to and including Standard IV with effect from the following year (Meetarbhan, 2009). The policy thus had strong echoes of Minister Parsuramen’s initiatives 18 years earlier. However, the teachers’ unions immediately expressed strong opposition (Hilbert, 2009), and the reactions of the general public suggested that achievement of the policy goal would not be easier than in earlier eras. Mauritius has a long history of initiatives which have aimed to tackle both the symptoms and the causes of private tutoring, but policymakers in each decade have found that the culture has become deeply embedded and is not easily amenable to change.

Box 4. Why is private tutoring in Mauritius so strong?

Historically, Mauritius’ education system has always been very selective and competitive, (i) to gain access to excellent schools (which becomes a self-perpetuating myth) at the secondary level, and (ii) to obtain state-funded scholarships for universities abroad.

In contemporary times, the demand for tutoring is still dictated by the fact that education remains essentially an exercise in selection, resting on an overloaded curriculum and high stakes examinations that determine access to higher levels of education in perceived ‘better’ universities. Tutoring is thus a means to obtain a competitive edge. Demand for tutoring is so strong that teachers in middle-class areas who are unwilling to provide tutoring are likely to face challenges.

On the supply side, the relatively low level of salaries constitutes a strong encouragement to tutoring. In 2002, the starting point for primary teachers was equivalent to 0.8 per cent of GDP per capita. This compared with the average of 1.7 per cent for OECD countries, and 2.0 per cent for countries with per capita GDP similar to that of Mauritius. Through tutoring, primary teachers could double or triple their incomes.

Source: Obeegadoo (2007), p. 2.

France

In France, unlike Korea and Mauritius, the tutoring industry has been driven not only by social and economic forces but also by government initiatives. These have included taxation incentives for families to invest in supplementary tutoring. Through such initiatives, the authorities have aspired to raise levels of educational achievement while sharing the financial burden.

The first major study of private tutoring in France was undertaken by Glasman and Collonges (1994). Their book noted that the history of tutoring dated at least from the previous century, but observed that the characteristics of tutoring had changed significantly with the expansion and greater inclusiveness of the education system. Glasman and Collonges analyzed the nature and role of private tutoring in the context of social competition and stratification. Their book was based on data from 9,400 students in 12 lycées (upper secondary schools) in the Rhône-Alpes region. An average of 15 per cent of the students were receiving tutoring, an additional 10 per cent envisaged taking tutoring in the future, and 36 per cent had received tutoring at some time during their secondary schooling (Glasman and Collonges, 1994, p. 30). The most popular subjects were mathematics (57 per cent), followed by physics and chemistry (20 per cent), English (9 per cent), and French (5 per cent). More tutoring was received in schools in large towns than in smaller towns, and tutoring was more common among pupils in private schools than in public schools.

Since the time of that study, tutoring has both grown and diversified. A decade later, Glasman (2004) returned to the theme in a report commissioned by the *Haut Conseil à l'évaluation de l'école* [High Council for School Evaluation] (HCEC) of the Ministries of National Education and of Higher Education and Research. The report noted (p. 51) the impact of a government decision to allow families to claim reductions in income tax for costs incurred in housework, childcare and private tutoring. This was part of an initiative by the Minister for Social Cohesion rather than the Minister of Education, who wished to provide support for single parents and others, and who also wished to encourage the growth of certain types of jobs. The measure encouraged some families which for cost reasons had hesitated to consider investing in tutoring, though still required some financial commitment and therefore still favoured the families able and willing to make some sacrifice. A number of enterprises took advantage

of this legislation. The market leader was a company called Acadomia, which was listed on the stock exchange, publicised its services aggressively, and drew explicit attention to the taxation relief.

The HCEC issued a comment on Glasman's report the following year (Forrestier, 2005), expressing concern about the implications for social inequalities and stressing the need for monitoring. In response, the government organized a national seminar on tutoring and inequality of opportunities in the domain of information and communications technologies (ICTs), which was supported by an online documentary resource and led to a set of policy guidelines (Bassy *et al.*, 2006).

In the same year, a further comprehensive analysis with links to documentary resources was provided by Cavet (2006) on behalf of the *Institut national de recherche pédagogique* [National Institute of Pedagogical Research] (INRP). The document highlighted official survey data from 2003 which had indicated that private tutoring was received mainly at the secondary school level and increased in intensity at higher levels. Pupils in junior high schools used this type of aid when struggling in a particular subject (especially mathematics), but 25 per cent of the sample were already performing well and saw tutoring a part of a strategy to achieve excellence (Cavet, 2006, p. 2). Rarely were teachers behind the decision to take private lessons. Rather, the impetus came more commonly from parents or in some cases (23 per cent at junior high, 40 per cent at senior high) the pupils themselves. Most parents who invested in tutoring belonged to relatively privileged social classes, and turned to tutoring either because they lacked the time or because they did not feel able to keep up with the curriculum. Private tutoring was rarely given by the normal teacher. Instead it was most commonly provided by another student (34 per cent), another teacher (31 per cent), or a private organization (21 per cent). Cavet (p. 4) quoted an interview with Glasman, who noted that sometimes private tutors were employed by parents in order to avoid tension with their children. Allowing conflicts over study habits to be addressed by outsiders, he observed, permits more harmonious family relations.

Further documentation was provided in 2007 by a company specialising in market analysis. The report (Melot, 2007, p. 104) described the growth of the sector as "explosive", adding that "boosted by the fear of parents faced by shortcomings in the school system, and also ... an extremely favourable fiscal environment, private tutoring registered in

2006 its sixth consecutive year of growth above 15 per cent'. Concerning the total size of the market, Melot noted estimates that 25 per cent of lower secondary students and 33 per cent of upper secondary students were receiving tutoring, especially in mathematics, but added a remark on regional variations. In particular, Melot observed that proportions were especially high in Paris, and cited (p. 105) the estimate by Acadomia that 75 per cent of students in large Parisian lycées were receiving tutoring. Nationally, over one million students were estimated to be receiving tutoring in 2008 (Pech, 2008).

Within the market were two major types of suppliers of tutoring:

- **Private teachers acting on an individual basis.** Parents and teachers contacted each other through recommendations or via advertisements, and increasingly through the Internet. This direct contact was the most widespread approach. Although transactions were generally not declared, the taxation incentive encouraged teachers to legalize their work in order to make their proposals more attractive to families. Some teachers were experienced (either still active or retired), but others were students or young graduates looking for work.
- **After-school tutoring companies.** These companies operated in different ways:
 - *Private lessons* given at home by a teacher sent by the company, or given in small groups on the agency's premises, were the most popular and saw considerable growth.
 - *Intensive courses* organized in small groups during vacations were developing slowly.
 - *Composite programmes* which combined study with leisure and childcare were starting to emerge.
 - *Online tutoring* was still rather undeveloped but expanding.
 - *School coaching* focusing on broader domains such as self-confidence, motivation and organization was emerging but still accessed only by the elite.

Among the companies were variations in mode of operation. Some provided tutoring for groups in their own premises while others employed tutors to work with pupils in the pupils' homes. Some companies specialised in particular subjects and/or specific levels of education, while others were more general. One group of companies provided tutoring as part of a broader range of services which included childcare and other domestic support. *Table 12* presents statistics on the market leaders. Some

of these companies focused on particular parts of France, while others either already operated in all major towns or aimed to do so. At least two operated as multinational enterprises: 2Amath had branches in Canada and Morocco, and Keepschool had branches in Germany and the United Kingdom. In this respect they were the counterparts of Sylvan, which was headquartered in the USA and had decided to penetrate the French market.

Table 12. Major tutoring enterprises, France

Enterprise	Enrolments	Number of offices in France	Declared size of business (€million)
Acadomia	100,000	97	87
Cours Legendre	30,000	9	16
Complétude	23,000	34	23
Sylvan	Not given	18	8
Anacours	16,000	50	5
2Amath	10,000	72	12
KeepSchool	8,000	80	5
Domicours	6,500	20	5

Source: Melot (2007).

These private operators had also evolved in the ways that they presented their services. Glasman (quoted in Cavet, 2006, p. 11) highlighted changes in the names of the companies during different eras:

- During the 1960s and 1970s, private tutoring commonly defined itself as a form of *remediation*. Companies had names such as Math-Assistance, Math-Secours and Ortho-Math.
- In the mid-1980s, the sector associated itself with *competition*. Company names included Études Plus, Performance, Stud Avenir, and Progress System.
- The most recent generation preferred ‘*normal*’ and *relaxed*’ connotations. Common names were Domicours, Keepschool, Complétude, and Après la Classe.

The image of serenity conveyed by private companies may be particularly suitable for negotiating the anxieties of schooling and the employment market. These economic and social circumstances differ in France from Korea, Mauritius and other places. Even within France they differ according to socio-economic group and location (especially large cities, small towns, and rural areas). This observation underlines the importance of viewing tutoring within specific contexts. At the same time,

providers of tutoring services benefit from any factors that increase academic competition and tension at school, such as privatization, competition between schools, and deterioration of segments of the school system.

However, the sector has attracted critics who query the quality of provision. A 2009 documentary on French television, for example (Bendall and Tourte, 2009), highlighted the amateurish nature of many tutors and probed the marketing claims of the companies which employed them. As remarked by Melot (2007, p. 99), much of the sector operated “under-ground”, and the market as a whole was “splintered, volatile and opaque” (p.119).

Box 5. The financial arithmetic of private tutoring in France

The French Government allows 50 per cent of costs paid to tutoring companies to be deducted from liability for income tax. Acadomia is among the companies which takes advantage of this provision. The company acts as a broker, putting tutors in touch with parents who pay the tutor and claim taxation relief.

For the registration of their child, parents must pay an initial registration fee of €75, which is not tax deductible. Then for each hour of tutoring, they pay an average of €32, out of which €14 (sometimes less) goes to the teacher, €5 for the employee charges and €13 to Acadomia. Out of this total of €32, €16 is tax deductible for the parents. Ultimately, therefore, the overall cost of an hour's tutoring is €16. The tutor must declare an income of $14 + 13 = €27$, but can deduct the €13 paid to Acadomia as ‘expenses’.

Source: Cavet, 2006, p. 12.

The most significant policy difference between the French and the Korean and Mauritian cases is the role of the tax system in encouraging families to invest in tutoring. The response of the French authorities to the criticism that this increases social inequalities has been twofold. One is that state-run homework support systems which are free of charge can be expanded. These state-run systems date from the 1980s, operate under the aegis of four different ministries (Education, Employment, Health, and Social Security), and rely on a network of 2,000 associations and public or semi-public institutions (Cavet, 2006, p. 4). Secondly, the government announced policies to develop tutoring in networks of schools with the objective that help would be available to pupils of all socio-economic groups. Initially, the offer was mandatory in some schools but voluntary in others. Subsequently, the authorities announced that all

schools would join the scheme, which includes homework help, cultural activities and sports, between 4 pm and 6 pm for four days a week. The government allocated €140 million to implement the policy (Ventura, 2008b, p. 9).

3. Policy responses

The previous section was entitled Diagnosis, to identify the features and impact of the private tutoring education system that need responses from policymakers. Some policy responses have been noted in the case study sections on Korea, Mauritius, and France. This section of the book elaborates on the types of responses which might be considered by policymakers in a range of settings. It includes note of what has not worked in various contexts in addition to policies that have been successful.

The presentation commences with the notion of mapping because each setting is distinctive and policies must be tailored to particular circumstances. It then turns to the demand for tutoring and to the supply of tutoring. Further remarks focus on ways in which policymakers could harness market forces to achieve broader goals, and on the nature of possible regulatory structures.

Mapping contexts, objectives and structures

When embarking on some sort of mapping, policymakers could usefully commence by asking two basic questions:

- To what extent is shadow education a problem (or likely to become one) which damages educational, social, and economic objectives and needs to be controlled?
- To what extent is shadow education a potential asset which has not hitherto been used fully and which should be encouraged?

The previous sections of this book have shown that in many settings private tutoring may be viewed with ambivalence. It helps to achieve educational goals at no cost to the government or the taxpayer, and acts as a sort of safety valve for families who can afford it and who feel that they are not getting all they want from mainstream education. However, tutoring that is entirely driven by market forces is likely to exacerbate social inequalities, and can have undesirable consequences for mainstream education. Also, unsettling ambiguities may arise from the co-existence of services which are provided free of charge by the government and similar ones for which fees are charged by the private sector for the same clients at the same time.

Policymakers must take into account the socio-economic profiles of students, cultural contexts and other factors. Patterns in Australia and the USA, where the government encourages private tutoring for low achievers, are very different from those in Korea and Japan where tutoring is more likely to be received by high achievers. Again, patterns in Singapore where teachers are forbidden to provide tutoring for the mainstream pupils for whom they already have responsibility are very different from those in Mauritius where such features are the norm. Policymakers may also have views on the extent to which secondary students, university students, retirees, and others should be encouraged or discouraged from providing tutoring. Further differences concern the modes of tutoring. One-to-one tutoring is clearly different from tutoring in large groups and huge lecture theatres; and direct face-to-face tutoring is clearly different from tutoring at a distance over the Internet.

Policymakers might wish to classify the private tutoring that currently exists in their own settings, and identify the types of tutoring that they would like either to encourage or discourage. This could be done with the aid of a chart such as *Table 13*. It refers not only to the type of tutoring and the mode, but also to the extent to which tutoring is currently common, and desirable in the future. These assessments of extent can be made more specific by subdividing into categories such as:

- *Income group*: Are certain types of tutoring chiefly accessible to families in specific income groups, and would policymakers like to expand access?
- *Gender*: Are girls disadvantaged compared with boys (or vice versa), and should greater equality be promoted?
- *Ethnicity*: Is tutoring more commonly received by some ethnic groups (or races) than others, and is this considered problematic?
- *Location*: Are specific regions, and rural/urban areas, advantaged or disadvantaged, and should a geographic balance be promoted?

Additional factors which could be brought into the table to make it more sophisticated would include:

- *Intensity*: At what grade levels, during what seasons, and in which subjects, is the intensity of tutoring greatest?
- *Quality*: What is the quality of tutoring, and to what extent does it assist in learning achievement not only for examinations but also in other dimensions?

- *Costs*: What are the unit costs of different types of tutoring, and to what extent are the costs a burden on households?
- *Economic implications*: To what extent is tutoring useful to people who need employment or supplementary incomes? Does the government wish to bring more tutoring work into the taxation system? What are the other economic implications of the various types of tutoring?

Table 13. A system for classifying private tutoring

Private tutoring providers	Mode	Extent to which it is common at present (perhaps differentiated by income group, gender, ethnicity and location)	Extent to which it is desirable in the future (perhaps also differentiated by income, gender, ethnicity and location)
Teachers tutoring their own pupils	one-to-one		
	small group		
	large group		
Teachers tutoring other teachers' pupils	one-to-one		
	small group		
	large group		
Students (secondary and/or university)	one-to-one		
	small group		
Others (such as professionals, retirees, housewives)	one-to-one		
	small group		
	large group		
Tutoring companies (local, national, franchised networks)	one-to-one		
	small group		
	large group		
	lecture theatres		
	crammers		
	software-supported		
Internet-based providers	one-to-one		

As data are generally scarce, policymakers are currently forced to make estimates and informed judgements based on their own understanding and on whatever data have been collected in their own or similar countries. One major recommendation of the IIEP policy forum, and of this book, is that much greater attention should be given to data collection in all types of settings.

Box 6. Distinguishing between types of *juku* in Japan

Some commentators, particularly non-Japanese ones, have presented the institution of the *juku* in a rather generalised way, commonly translating the word as ‘cram school’ and failing to note wide variations between types. More careful analysts have identified multiple types of *juku*, each of which has different implications for policymakers.

Roesgaard (2006, p. 32) began with a broad distinction between academic *gakushū juku* and those directed towards arts, technical training, English conversation, etc. Then are distinctions between *gakushū juku* according to specializations. *Hoshū juku* offer remedial teaching, while *fukushū juku* provide supplementary teaching, and *yoshū juku* provide preparatory teaching. *Shingaku juku* cater for pupils with high achievement who wish to do better, while *kyōsai juku* have a flexible approach in contrast to *doriru juku* which rely on drills and competitive exercises. Some operate under the category *deai no ba* or *idokoro* (a place to be and meet with friends), or even *takujijo* (care centre).

Roesgaard went further to construct a typology based on eight variables:

- *Atmosphere*: whether the institution is competitive, stimulating, relaxed, supportive, etc.
- *Focus of courses*: whether the courses are oriented towards the regular system of schooling or towards entrance examinations
- *Relation to school*: whether the institution or course supports learning in the regular schools or follows its own goals
- *Students*: the nature of the clientele, and particularly their level of academic performance
- *Teaching material*: the combination of school, commercial and homemade materials
- *Size*: the number of clients, and whether the *juku* is part of a chain of institutions
- *Admissions*: whether clients are screened with admission examinations or just accepted as long as the institution can physically accommodate them
- *Advertising*: whether recruitment is by word of mouth or commercial advertising, and the features emphasised such as pedagogy or success in university entrance examinations.

The matrix of *juku* types and variables produced an instructive typology:

	Shingaku juku	Hoshû juku	Kyôsai juku	Doriru juku
Atmosphere	Competitive/ stimulating	Relaxing/ supportive	Nurturing/ supportive	Relaxing (often home study)
Focus of course	Entrance exams	Catching up and school tests	Basic learning	Basic skills
Relation to school	None	Follow pace of classes, relations often close	Very little or none	None
Students	High performers	Average performers	Poor performers	All levels
Teaching material	Own texts	Homemade, commercial or school texts	Homemade, commercial or school texts	Own texts
Size	> 200 students, some franchise	< students	< 100 students	Thousands
Admission	Entrance exam or test	Physical limits only	Physical limits only	No limits
Advertising	Commercial, stresses university entrance	Word of mouth, pedagogy	Word of mouth, pedagogy	Commercial, in some cases pedagogy

Addressing the demand for tutoring

Governments in Australia, England, France, Singapore, and the USA have in different ways sought to stimulate demand for tutoring. The Australian scheme launched in 2004 was entitled the *Tutorial Voucher Initiative* and enabled eligible parents to spend up to Au\$700 (approximately US\$547) to secure tutoring for their children. In 2007 the Australian federal government allocated funding for four years for a follow-up scheme entitled *An Even Start* (Watson, 2008, p. 7). A similar system was used in the USA (Burch *et al.*, 2006), and both the US scheme and the original Australian one were part of the inspiration for the model launched in England (Taylor, 2007). In Singapore, the government has provided grants and other encouragement to community groups in order to stimulate demand among low achievers (Tan, 2009). By contrast, the French system of taxation incentives has not been specifically targeted either at pupils with low academic performance or at low-income households (Melot, 2007).

These models have each encountered their own challenges. In Australia, Watson (2007, p. 9) noted the need for more robust data on the

effectiveness of tutoring and the difficulty of finding sufficient tutors with appropriate skills, particularly in rural and remote areas. This was not a difficulty in highly-urbanized Singapore where the challenge is to sustain demand from low achievers in a context where market forces are more likely to widen gaps through tutoring at the top end of the market (Cheo and Quah, 2005; Tan, 2009). In the USA, Sunderman (2006, p. 119) criticized the NCLB structure for its failure to demand evidence of effectiveness, noted that some providers used “unscrupulous practices” to attract students, and added that nationwide only about 20 per cent of eligible students actually participated in the programme. Such factors could usefully be considered by policymakers elsewhere who intend to introduce similar schemes.

In other settings, the chief concern is how to dampen, rather than to stimulate, demand. The Korean case study shows that many strategies have been tried in that country, including a total ban on private tutoring. The Mauritian case study similarly recorded the attempt to ban tutoring in Standards I to III. These policies have parallels in many other countries, including Cambodia (Bray and Bunly, 2005, p. 75), Egypt (Hartmann, 2008, p. 48), Kenya (Wanyama and Njeru, 2004, p. 1), Turkey (Tansel and Bircan, 2007, p. 6), Uganda (Eilor, 2007, p. 28), and in the Indian state of West Bengal (Jalaluddin, 2007, p. 2). None of these bans have been effective, however. With reference to Egypt, for example, Hartmann (2008, p. 48) echoed the remarks of Herrera (1992, p. 75), who had described the prohibition as no more effective than “the illegality of jay-walking [i.e. pedestrians crossing streets in places other than designated crossing locations], which is widely practiced because of the low, almost nonexistent legal risk associated with it.” Even in Korea and Mauritius, where the prohibition was widely publicized and the government made strong efforts, enforcement proved impossible. A strong case can be made for prohibition of private tutoring of pupils by classroom teachers who already have responsibility for those pupils in their mainstream classes, but this is different from a blanket ban on tutoring.

In general, therefore, policies that focus on the demand for private tutoring should address the root causes of the demand rather than the superficial symptoms. Many of these root causes cannot be addressed by education ministries alone since they concern culture and economics. Cultural factors include the extent to which educational achievement is socially respected and deserves sacrifice, and economic factors include the rates of return from higher levels of education and thus the extent to

which tutoring is a worthwhile investment to achieve those higher levels of education. Action on these fronts might be needed by Ministries of Economic Development and Ministries of Family Development, or their equivalents, as well as by Ministries of Education. In countries as different as Austria and Korea, some major initiatives have come from the highest levels of government rather than from professionals in the education sector. Government authorities may also wish to collaborate with civil society bodies, including religious organizations and social welfare groups.

Nevertheless, professionals in Ministries of Education do commonly have some levers that they can pull to influence the size and nature of the shadow education system. In particular, they should consider:

- *Examinations.* In many countries, the nature of examinations underlies much of the demand for private tutoring. Many examinations are of the ‘high stakes’ sort, from which the results have major implications for the examinees’ subsequent life chances. The format of examinations may reward short-term cramming from tutoring as opposed to long-term fundamental understanding of the topics. Education authorities should therefore review the nature of their examinations. However, they should not naively think that reform of examinations is a simple matter. As the case studies of Korea and Mauritius have demonstrated, many vested interests and balances may need to be considered.
- *Transition rates.* In some countries, the demand for tutoring is exacerbated by awareness that only a limited proportion of applicants can move from one level of education to the next. One way to reduce demand for private tutoring could be to widen the gate so that larger proportions can proceed. Nevertheless, this measure also is not always straightforward. In some societies, the key question simply changes from whether a student can proceed to the next level to which type of institution can be accessed within the next level. Societies which retain substantial stratification with elite institutions for the few will still find that demand for private tutoring to be able to enter them remains high.
- *General public confidence.* Much tutoring is demanded because parents have limited confidence in the ability of mainstream education systems to cater for society in general and for their own children in particular. Schools may be recognized as necessary institutions for socialization and other functions, but may be regarded as needing supplementation. Ironically, in some settings this is because of

expansion in order to reduce demand for tutoring by enlarging transition rates. Governments must be aware, however, that most of the pressure for tutoring comes not from low achievers but from high achievers; and on international comparisons, tutoring may be much more widespread in education systems that have high achievement, for example in East Asia, than in ones that have low achievement, for example in Africa.

Policymakers and planners may also usefully consider precisely what is being sought in different types of tutoring. Why are families willing to pay to join classes of 110 pupils (*Box 7*) when they would complain vigorously if class sizes exceeded 35 in the fee-free public system? What do parents feel their children gain from small-group and one-to-one tutoring that they cannot get in the normal mainstream school or through parental help with homework? And in what circumstances might inputs from an untrained university student who helps a secondary school student on a part-time basis be a useful investment alongside the work of trained professionals in the mainstream secondary school system?

Box 7. A master tutor in Egypt

The following description by Hartmann (2008, p. 43) is of a tutor in Egypt who has a strong reputation and market appeal. As indicated, he also attracts large classes.

I have been invited ... to attend this chemistry class, so I take a seat in the last row of the girls' side of the room. When the lesson starts, I count 110 students, all aged around 14. Three or four young employees urge them to keep quiet and pay attention. When Mr. Hisham enters the room, the chattering stops and 110 pairs of eyes are directed expectantly at the teacher. Mr. Hisham is a slim man of approximately 45 years, with sparse hair and a thin moustache. He is dressed conservatively, wearing a shirt, tie and a lime-colored jersey, but his inconspicuous appearance is misleading.

As it turns out during the following two hours, Mr. Hisham is not only an experienced and renowned teacher, but also a talented "show master". Mr. Hisham moves dynamically in front of his audience, writing formulas onto the blackboard and explaining them at the same time in a rhythmical recital through his microphone. From time to time, he chants certain formulas and phrases, which are then repeated several times in chorus by the students who seem to know their cues very well. ... The students hardly ask any questions, although they are encouraged to write down any questions on a slip of paper which is then passed on to the teacher by one of the assistants.

Addressing the supply of tutoring

In some settings, supply may create demand. Three particular circumstances may be considered under this heading:

- *Teachers creating their own markets.* As noted, in some countries it is common for teachers to offer extra lessons for the pupils for whom they already have responsibility in mainstream classes. In the most problematic cases, the teachers exert pressure on the pupils by covering only part of the curriculum during normal hours and by letting the pupils know that their progression to higher grades is at least partly controlled by the teachers themselves. As noted by Silova (2007, p. 8), ‘compulsory’ private tutoring:

involves teachers pressuring (and sometimes blackmailing) their own students to take supplementary private tutoring with them after school hours, often threatening students with lower grades if they refuse.

Among the regions covered by Silova, the practice seems to be particularly widespread in Central Asia (Kazakhstan, Kyrgyzstan, Tajikistan, and Mongolia) and the Caucasus (Azerbaijan and Georgia).

- *Pressure from peers.* When everybody else seems to be receiving tutoring, both the students and their families may feel left out and neglectful if they do not do likewise. As noted by one of the mothers interviewed by Kim (2007, p. 9):

All mass media report that people have private tutoring, and mothers of [my child’s] friends say their children learn this one or that one in private institutes. ... I want him to have a better life so I make him attend private institutes and invest more on him.

- *Advertising by tutoring providers.* Tutors in a commercial environment operate like other businesses and seek to create demand for the services that they provide. Some advertise in the streets, in newspapers, and on public transport. The quality of their work may not have an empirical evidence base and, as in the mainstream, it may be possible to blame the pupil rather than the teacher when performance is poor. The rise of the Internet has removed some of the geographic constraints on supply. In some countries, the demand

is further expanded by franchising. As explained by Davies and Aurini (2006, p. 124):

This arrangement links small businesses to centralized networks, but franchisers differ from corporate chains in that local businesspeople own their outlets and assume most of the risks. Local owners have a financial stake, so they are presumably motivated to deliver the franchise service more efficiently than would a salaried manager. These small investors obtain the right to sell an established and recognized product and receive marketing help, managerial training, and product-testing aids. ... Whether they are selling coffee, renting cars, or tutoring students, local franchise owners are given immediate access to a visible product and an established customer base.

The issue of teachers providing tutoring to their existing pupils may be viewed within the context of wider discussions on corruption (Hallak and Poisson, 2007; Poisson, 2007; Dawson, 2009). *Box 8* presents Klitgaard's useful formula to conceptualize issues. Applying the formula to private tutoring, it suggests that teachers have greater opportunity and therefore likelihood of being corrupt when they have a monopoly over their pupils' learning, when they have discretion over who passes or fails tests, and when they have little or no accountability to other parts of the system. In Mauritius, the decision to replace class teachers for every subject in Standards IV-VI with separate teachers for each subject aimed to reduce the monopoly of those teachers. Other measures seek to reduce discretion and increase accountability at the school and system level.

Box 8. Monopoly + Discretion – Accountability

Focusing on the nature and causes of corruption, Klitgaard (1988, p. 75) reduced the core elements to a formula:

Corruption = Monopoly + Discretion – Accountability.

He suggested that illicit behaviour flourishes when agents have monopoly power over clients, when agents can exercise their discretion, and when the accountability of agents is weak.

Biswal (1999, p. 223) has shown how this concept exposes the parallels between private tutoring and other forms of corruption, particularly where mainstream teachers provide private tutoring for their own pupils. These teachers, Biswal pointed out, “are the monopoly suppliers of their services to the students, they have the full discretion in what they supply, and they are hardly held accountable for their actions. This gives rise to a situation where the teachers try to extract students' consumer surplus by shirking at school and supplying tutoring outside for a fee.”

Johnson (2008) added a gloss on this conceptualization, bringing in further variables including subject matter being taught, the socio-economic status of the students, and the achievement level of the students. He indicated with reference to his work in Kyrgyzstan that (p. 213):

the differences between teachers who are and are not reported to engage in corruption is likely not explained by knowing their gender, ethnicity, age or administrative role, but rather by knowing who their students are, who their fellow teachers are, who their school director is, what subject they teach, and in what district they live.

More specifically (p. 219):

A highly corrupt teacher in Kyrgyzstan most likely teaches a high demand subject like math, Kyrgyz language, or English, not a low demand subject like history. They are more likely to teach high SES [Socio-Economic Status] students and students achieving in the middle of the GPA [Grade Point Average] range. They are more likely to teach in a less developed and more ethnically homogeneous area, whether urban or rural. Most significantly, the highly corrupt teacher likely works in a school where the “strictness” of other teachers and the professionalism of the school director do not overlap on their jurisdiction.

Thus Johnson is suggesting that Klitgaard’s basic proposition is valid because such teachers have ample monopoly over high-demand education goods and much discretion over their disposal. But the variables added by Johnson include demand from students made operational by their purchasing power, their abilities, and their concern for particular subjects. In this respect, the corrupt teacher also needs corrupt clients. The implication for policymakers is that different variables may need to be considered in different circumstances.

In this light, the fact that some education systems are increasing rather than reducing teachers’ discretion may be less of a contradiction than it could appear at first sight. One way to reduce the backwash effects of high-stakes examinations is to make examinations only one component of evaluations alongside school-based assessments of various kinds. School-based assessments necessarily increase the role of teachers, and thus increase their discretionary power. A major question for policymakers is whether expanded school-based assessment would improve the system or create further problems. The answer will depend to a large extent on the professionalism of the teaching force and the extent of its self-regulation. The move would not seem to be wise in some parts of Kyrgyzstan, but it

could be appropriate in other parts of that country and in other countries, particularly if coupled with development of a code of ethics either for private tutoring itself or for tutoring as part of a more global teacher code (Poisson, 2007, p. 17). Teachers’ unions could be valuable partners if they can be persuaded to take a stand on the matter.

Also deserving note is the set of models presented by Taylor (2007, pp. 17-18) for consideration in the Making Good Progress scheme launched in England in 2007 (*Table 14*). This scheme actively considered employing classroom teachers to provide additional tutoring for their existing students, presumably feeling that supervisory structures would be adequate (in other words that there was sufficient accountability) and that ethical issues would not be a problem. It also considered teachers from other schools, professional tutors, and learning mentors, provided that they have Qualified Teacher Status (QTS). Unqualified university students were not considered, and trainee-teachers were only considered in exceptional circumstances if already known to the pupil’s school. This set of models may be useful elsewhere, though it must be stressed it was drawn up in a setting that had strong financial resources and a strong base of teacher professionalism.

Table 14. Models for tutoring considered in England’s ‘Making Good Progress’ scheme

Option	Benefits	Limitations
Class teacher	<ul style="list-style-type: none">• Knows the pupil and needs• Knows the parents• Follow-up in class easier• Quality assurance more secure	<ul style="list-style-type: none">• Response of child to the class teacher as the out-of-school tutor• A fresh approach/personality may be needed to engage the child• Teacher’s current workload could be an issue• Teacher’s time could be limited as already engaged in after-school activities• Parental view of tuition – tutor should be someone different from class teacher

Option	Benefits	Limitations
Another teacher in or associated with the school	<ul style="list-style-type: none"> • Change of face and style • Wider experience • Knowledge of school systems and policies • Opportunity for paired work • Liaison with class teacher and parents easier • Access to records and planning • May already be known by child and parents • Quality assurance more secure 	<ul style="list-style-type: none"> • Pupil insecure about change • Teacher not familiar with needs of child • Teacher's current workload could be an issue • Teacher's time could be limited as already engaged in after-school activities • Parental view of tuition – tutor should be someone different from a known teacher
Cross-phase tutoring e.g. teachers from partner schools	<ul style="list-style-type: none"> • New face/new ideas • New experience for teachers • Improves and strengthens transition • Good practice shared across school districts 	<ul style="list-style-type: none"> • Training for 'out of phase' teachers may be required • Better for older pupils more adaptable to changing teachers • Teachers not familiar with expectations of the phase • Teachers not familiar with needs of the child • Quality assurance of tutoring sessions more difficult to monitor
Any teacher	<ul style="list-style-type: none"> • New face/new ideas • Fresh view of the pupil's needs • Widens participation of teachers in programme • Experience of working in other contexts 	<ul style="list-style-type: none"> • Lack of appropriate key stage subject knowledge • Lack of understanding of school systems • Opportunities for liaison with class teacher more difficult due to timing of the day and various locations • Not familiar with expectations of the phase • Not familiar with needs of the child • Quality assurance of tutoring sessions more difficult to monitor

Option	Benefits	Limitations
Tutorial organization	<ul style="list-style-type: none"> • They recruit the tutors • Potentially larger pool to draw on • All administration done for local authority • Capacity and time not an issue • Eases workload pressure on teachers in schools 	<ul style="list-style-type: none"> • Level of knowledge of up-to-date strategies • Quality of tutoring sessions more difficult to monitor • Geographical location of tutor • Ability to build relationships with pupils and parents quickly • Understanding of school systems e.g. tracking/streaming of pupils • Venue costs • Safety and security issues
<i>Other suggestions:</i> Consultants; leading teachers; further education teachers; returnees to teaching; information and communications technologies (ICT); teachers/head-teachers not in the pilot; family-learning tutors (must have Qualified Teacher Status [QTS]); learning mentors (must have QTS); trainee teachers under exceptional circumstances if known to the school	<ul style="list-style-type: none"> • Change of face and style • Wider experience • May already be known by child and parents • Have appropriate subject knowledge 	<ul style="list-style-type: none"> • Quality of tutoring sessions more difficult to monitor • Recent and relevant experience appropriate to key stage • Lack of appropriate key-stage subject – knowledge may require additional training and support

Harnessing the market

Policymakers who take the view that private tutoring already exists and could not be eliminated even if the authorities would like to do so, may choose to investigate ways in which they can harness the market to promote synergies. Examples of this have already been presented above. For example, in Mauritius teachers have been permitted to use school classrooms in order to bring the shadow system more fully into the light and to permit some sort of regulation. Similarly the authorities in Zanzibar have allowed government schools to charge a small fee for extra tutoring

provided by teachers after the official working hours in situations where parents are in agreement. A government document (Zanzibar, 1998, p. 18) explains:

Though controversial, the measure offers a rare opportunity for parents to voluntarily contribute to teachers' remuneration and therefore increasing the motivation of teachers and decreasing their propensity to look for another job. This measure has a positive impact on access as the number of teachers to be recruited to cope with the ever increasing enrollment becomes fairly stable.

This policy has some dangers insofar as it alleviates pressure for desirable structural changes through which teachers would be salaried at appropriate levels for the type of work that they do. Moreover, it can become a hidden form of privatization which shifts the culture of schooling and could be difficult to reverse. Nevertheless, the authorities have recognized that tutoring exists and have endeavoured to promote synergies with the mainstream.

Other initiatives may be found at the school level but can be encouraged at a district or higher level. In Cambodia, as elsewhere, primary school administrators have found that teachers are more keen to teach popular subjects and in the higher grades because then they have a stronger captive market for private tutoring (Bray and Bunly, 2005; Dawson, 2009). As a result, the earlier grades and other subjects may be neglected. One strategy employed by a far-sighted headteacher has been to pool the revenue from tutoring to share it among all teachers in the school. This decision was taken on his own initiative, but is a measure that could be applied system-wide.

Governments can also encourage tutors to professionalize their own activities. Taiwan, for example, has an association of tutoring providers which monitors the educational and business dimensions of its members. In 1999, Taipei City had about 1,150 tutorial schools of which half were members of the Taipei City Association for Providers of Tutorial Education. The association fielded complaints from the public against member schools, published a newsletter, and acted as a self-regulating body (Bray, 2003, p. 57). In Greece, a parallel body is the Hellenic Federation of Frontistiria Teachers which was established in 1981 and by 2008 had 3,000 members who were owners of tutoring schools and 37,000 members who were tutors (Hagitegas, 2008a, p. 1; see also Hagitegas, 2008b). These

organizations are professional bodies with which the government can interact and negotiate for the common interest of the children's welfare.

Other tutoring companies have sought to secure their reputations by highlighting quality-control standards. In Germany the large tutoring enterprise, Schuerhilfe.de, boasts that it subjects itself to the customer management quality certification process ISO 9001. In France, Complétude has sought to differentiate itself from competitors in the same way. These initiatives were taken by the companies themselves, but could perhaps be encouraged by national governments through a threat of external regulation if such enterprises do not visibly undertake self-regulation.

Governments can also use the marketing strategies of tutorial schools to raise awareness among specific segments of the population. In Korea, Kim (2007, p. 14) reported that private institute instructors commonly identify differences between upper-middle-class communities and lower-class communities, indicating that parents in the latter are less likely to push their children to study. Since the tutorial institutes wish to expand their markets, they "actively provoke people's desire for social mobility through education". This can serve the governments' purposes too insofar as it encourages educational activities in lower-class communities.

In similar vein, governments can promote tutoring through arrangements with non-governmental organizations (NGOs) and civil-society bodies. Jalaluddin (2007, p. 4) highlighted the Community Learning Assistance Project (CLAP) in Bangladesh, which was launched in 1998 to help children and communities develop their own capacities to support learning improvement. One component of CLAP is the recruitment of community-based tutors, mostly college and university students chosen by local communities and trained by the NGO working with them. The tutors work in close cooperation with classroom teachers, though not under their direction.

In parallel is an initiative in Egypt where the authorities have frowned on much of the shadow education system but have decided to promote aspects by encouraging charitable organizations to provide tutoring for low-income groups in mosques, churches and other buildings. Hartmann (2008, p. 41) reports that this official and legal form of tutoring was introduced "as a reaction to the widespread existence of illegal tutoring practices". The private voluntary associations are required to register with the Ministry of Social Affairs rather than the Ministry of Education.

Improving regulatory structures

A useful place to commence commentary on regulatory structures is the paper by Silova (2007). She remarked (p. 9) that, notwithstanding the extensive nature and adverse effects of private tutoring in Eastern Europe and Asia, only six of the 12 countries that she studied had regulatory frameworks – Kazakhstan, Lithuania, Mongolia, Slovakia, Tajikistan, and Ukraine (*Table 15*).

Table 15. Legal frameworks regulating private tutoring in six countries of Europe and Asia

Kazakhstan	The delivery of supplementary educational services by state educational institutions is regulated by a 1999 decree. Private tutoring is defined as the provision of classes in school subjects to students on an individual basis in addition to the academic hours prescribed by the state curricula. The decree also stipulates that schools can offer such educational services as supplementary educational programmes beyond the state educational standards.
Lithuania	The 2003 Law on Education introduced the concept of a freelance teacher, defined as a person licensed to engage in educational activity on an individual basis. A freelance teacher can provide non-formal education or implement programme modules that supplement pre-school curricula and/or formal education programmes. Freelance teachers have the right to work according to their individual programmes, choose methods and forms of pedagogical activity, and provide consulting and in-service assistance. The Law sets obligations for freelance teachers, including observing ethics, securing learners' safety, having a workplace for teaching that meets hygiene requirements, and implementing the teaching process agreed upon with the students. The Law prohibits freelance teachers from tutoring their own students in mainstream schools.
Mongolia	Amendments to the 2006 Law on Education and the 2007 Ethics Code of Preschool, Primary and Secondary School Teachers prohibit teachers from tutoring their own students in mainstream schools. In particular, Section 2 of the Ethics Code states that teachers "shall not force students to purchase books, educational materials, and other items, insist on paying fees and charges that are not indicated in the legislation, and offer private tutoring instigated by teachers". Teachers violating the Ethics Code will be fined or punished by losing their teaching certificates.
Slovakia	The Trade Licensing Act stipulates conditions for tutoring in foreign languages and arts. Tutoring in foreign languages is possible only upon obtaining a degree in this field (university study or foreign language certificate) or by a 10-year stay in a country where the language is officially spoken. Teaching or tutoring in an artistic field is conditional

	upon obtaining a certificate from an arts school or after 10 years of practice in the field. However, there are no qualification requirements for tutoring in other school subjects and no legal restrictions on private tutoring by teachers themselves.
Tajikistan	The 2004 Law on Education defines a private tutor as “a teacher who offers tutoring to students on an individual basis or in groups, beyond the [official] working hours at school or university”. According to Article 24, parents or other custodians may request state secondary schools to arrange supplementary classes for a fee. The Law states that supplementary tutoring can be carried out in addition to the official school curriculum in the following areas: (1) separate programmes and subjects which are not covered by the state education curriculum; (2) in-depth study of topics which are not covered by educational institutions, and (3) other types of educational services which exceed state education standards.
Ukraine	In 2003, the Ministry of Education and Science banned private tutoring on school premises. In response to parental complaints about ‘compulsory tutoring’ (i.e. tutoring provided and/or required by a student’s class teacher), in 2004 the Ministry prohibited teachers from private tutoring of their own students.

Source: Silova (2007), pp. 10-11.

Among these six countries, Lithuania had the most elaborate framework. Lithuania’s 2003 Law on Education provided a comprehensive definition of a private tutor (described as a ‘freelance teacher’), and detailed registration procedures. It also set out obligations for private tutors, including observation of teacher ethics, learners’ safety, and an appropriate location for tutoring. The Lithuanian Law envisaged that some tutors might also work in mainstream schools, and forbade them to tutor their own students in such schools (see also Būdienė and Zabulionis, 2006, p. 218).

In Slovakia, by contrast, the Trade Licensing Act stipulated conditions for tutoring only in foreign languages and arts. No qualifications were required for tutoring privately in other school subjects, and most tutors operated in the shadow economy without trade licenses and with untaxed incomes (see also Kubánová, 2006, p. 282). Furthermore, no regulations restricted private tutoring by teachers themselves. Only three countries in the group (Lithuania, Mongolia, and Ukraine) forbade teachers from tutoring their own students in mainstream schools.

Silova noted (p.11) that in any case the regulations were rarely enforced. Procedures in Kazakhstan and Tajikistan were particularly complex and costly; and even in Lithuania, which had the most elaborate structure, few tutors registered as demanded. Further, the Lithuanian State

Tax Inspectorate considered it almost impossible to prove that a person might be engaged in tutoring and receiving non-declared incomes. In Kazakhstan and Tajikistan, legislation stipulated that parents should transfer payments for supplementary tutoring to the bank accounts of educational institutions, but few public schools in Kazakhstan and no public schools in Tajikistan actually had bank accounts. Silova also highlighted (p. 12) the lack of taxation incentives. The Tajikistan Law on Education stated that “incomes generated from the delivery of paid educational services are subject to taxation in accordance with the Tajik legislation”. However, the government had no mechanism to enforce this regulation, and the tutors had no incentive to volunteer compliance.

Other countries have different legal structures and norms. Even Korea and Japan have significant differences despite Japanese influences on Korea’s legal system during the colonial period. Kim and Lee (2008, p. 9) stated that operators of *hakwons* must acquire permits from the government. Their instructors must have certain academic requirements and their facilities must satisfy safety standards. The regulations also require fees to be kept below the limit set by committees operated by local education authorities. Kim and Lee remarked (p. 9) that:

The strong regulation is a sharp contrast to the *laissez faire* approaches in Japan to *juku*. The Japanese government has treated *jukus* like other small businesses, and does not regulate them. Accordingly, compared to *jukus* that encompass a variety of forms of private instruction and meet the educational demands with flexibility, *hakwon* is a more narrowly defined form and is made to be more like schools.

These remarks are echoed by such authors as Dierkes (2008) and Mori (2008). Other examples presented at the IIEP policy forum include:

- In *Austria*, most tutoring takes the form of a one-to-one ‘home-industry’ in which the providers are university students, retirees, and active teachers. Regulations for public servants prohibit teachers from tutoring pupils from their own schools (Gruber, 2007, p. 3; see also Gruber 2008).
- *India* has no national policy to regulate tutoring, but some states have regulations (Sujatha, 2007, pp. 29-30) most of which forbid mainstream teachers from undertaking private tutoring. In some states, mainstream teachers are allowed to provide limited private tutoring with permission from the school head if in extreme financial hardship. Sujatha stated (p. 29) that “it is a matter of common knowledge that teachers provide private tuition in [an] unrestricted

way”. In Maharashtra State, coaching centres are registered under the Shop Act of the State’s Revenue Department, while agencies providing tutors for home tutoring are registered under the Charity Commission Act. In theory, registration has to be renewed every three years, but it “generally does not occur due to the laxity of concerned departments and authorities” (Sujatha, 2007, p. 30).

- In *Namibia*, “there seemed to be no regulations guiding the provision of extra tuition” (Nghiyoonnanye, 2007, p. 2), despite the fact that the practice was increasingly visible.
- The *Portuguese* authorities in 1999 passed a regulation on the “accumulation of public functions with private activities” in the education sector (Neto-Mendes and Costa, 2007, p. 3). Permission to accumulate duties could only be given when “the private activity in question, when similar or of identical content to the public functions performed by the applicant, is not directed at the same students [of the teacher’s main activity]”. In 2005 a more specific regulation stated that a teacher in a public school may not undertake a private activity – which includes private supplementary tutoring – when the students involved are pupils of that school. However, Neto-Mendes and Costa added (2007, p. 3) that:

The restrictions set by legal documents are only worth so much, as we know: they have the value of a sign that political authorities send to society, defining possibilities and restrictions.... Their effectiveness, however, raises many doubts, especially if they are not accompanied by additional measures that show the advantages of such a directive ... on the one hand, and the unequivocal political will to support and enforce the legal guidelines decreed, which implies rigour and control, on the other.

- In *Singapore*, mainstream teachers must seek permission if they wish to engage in over six hours of private tutoring each week, and they are prohibited from offering their services to students in the schools in which they are working. However, these regulations are not rigorously enforced, and no regulations address the quality of tutoring (Tan, 2007; see also Tan, 2009, p. 100).
- In *Macao*, legislation approved in 1998 requires tutoring centres to apply for licenses and to operate in premises that meet hygiene and safety standards (Sou, 2007, p. 3). The license-holding entity must submit a Certificate of No Criminal Conviction, and the person responsible for daily management must possess qualifications from

junior college level or above. Tutors providing assistance to primary, junior secondary, and senior secondary students should have qualifications not lower than junior secondary, senior secondary, and higher education respectively. The licenses of tutorial centres are renewable every year, and the government's Education and Youth Affairs Bureau has the right to close centres without licenses. Because the registration system is laborious and has rewards, tutors who do have licenses sometimes report unlicensed tutors to the authorities.

- In *Uganda*, the Ministry of Education and Sports “has no concrete policy on coaching” (Eilor, 2007, p. 33). The Ministry has issued various circulars, terminated the employment of headteachers and teachers on the grounds of abuse of responsibilities in the context of tutoring, and made periodic appeals to parents to cooperate in discouraging tutoring. However, there is “no effective machinery for handling the challenge as evidenced by lack of clarity about roles of different management levels in handling coaching” (Eilor, 2007, p. 33).

Patterns in England also deserve elaboration. According to Ireson (2007a, p. 5), for most forms of tutoring in the market place “anyone could set themselves up as a tutor without any relevant qualifications or experience”. However, the government's Making Good Progress scheme has extensive regulations on who can be employed as a tutor and how much such a person should be paid. For example, a Factsheet for the general public made available by the Hertfordshire Local Authority (2009) indicates that a tutor employed under the scheme must:

- have qualified teacher status (QTS), though not necessarily employed as a teacher; or
- be non-QTS in the summer before gaining QTS; or
- be an overseas trained teacher qualified to teach in schools in England; or
- be a Further Education or Higher Education trained teacher with appropriate subject qualifications.

All tutors employed under the scheme must be cleared by the Criminal Record Bureau, and tutors who are employed by Local Authorities or school Governing Bodies must be remunerated according to specific pay scales that also bring pension rights. Sharma (2009) remarked that under such arrangements:

the country's underground army of private tutors, many of them moonlighting school teachers ... will be tapped as a valuable resource for the governments "personalised learning" goal for schools.

Meanwhile, however, a survey by Tanner, Day, *et al.* (2009, p. 47) of 103 tutoring agencies in the general marketplace found that only 43 per cent required their tutors to have teaching qualifications or QTS, though 79 per cent reported that they conducted Criminal Record Bureau checks on all their tutors.

This sketch of regulatory measures shows that some governments take matters seriously but that many governments have no regulations at all, others have ambiguous regulations, and yet others have clear regulations that are not rigorously implemented. In general, the domain needs greater clarity, which can be facilitated by cross-national comparison. In most countries, a strong case can be made for prohibition of tutoring by mainstream teachers of the pupils for whom those teachers already have responsibility. Such tutoring is envisaged and officially sanctioned in England and Australia, and it is also permitted in France and various other countries. But the potential for corruption seems to be a strong argument against permitting this form of tutoring – provided, of course, that governments sufficiently remunerate regular teachers so that they are not forced by necessity to seek such forms of additional income.

4. Monitoring and evaluation

Policymakers need to monitor all forms of education in their jurisdictions in order to identify the nature of planned and unplanned changes. In addition, evaluation mechanisms are especially needed to assess the impact of specific policy interventions. The following sections present a range of experiences from the domain of private tutoring. Data are arguably needed at multiple levels: individual school, district, country, and international. The first section focuses on in-country assessments, while the second one focuses on cross-national ones.

National and local feedback loops

The section on Diagnosis in this book began by noting that collection of precise data on the size and shape of private supplementary tutoring is difficult. For various reasons, tutors, students, and parents may be unwilling to reveal the amounts and types of tutoring that they provide, receive, or purchase. Also, tutoring commonly varies in duration and intensity in different seasons; and the impact may be difficult to determine when there are many other variables.

Nevertheless, the fact that tutoring *can* be monitored and evaluated is evident from the many research studies reported in this book. Ireson remarked (2007a, p. 3) that students in educational institutions are commonly the best source of information, since it is relatively easy to administer questionnaires to them in class. She added that:

Student surveys provide a great deal of useful descriptive information on the nature and extent of tutoring, the popularity of tutoring in different subjects, the intensity of tutoring received and patterns of tutoring during the school years. These surveys frequently obtain additional, demographic information and may also include questions about reasons for employing tutors and students' views about tutoring.

Researchers may usefully supplement quantitative surveys with interviews and other qualitative investigations. The latter may help identify and classify the many types of tutoring. Yet although non-random samples provide useful descriptive information, their findings are of limited value for comparing either the extent of tutoring in different countries or trends over time.

Ireson (2007a) also observed that survey questions commonly rely on the accuracy of respondents' memories e.g. about the amount and cost of tutoring received. Responses to questions about the current situation are likely to be more accurate than those about tutoring received in the past. Questions to students about the costs of tutoring may not yield reliable information because students may not know the details of payments made by their parents. Moreover, when students attend a variety of extra lessons and individual tutoring, they may not see a clear demarcation between fee-paid and free tutoring.

In all these matters, a detailed knowledge is needed of the range of available options to ensure that questions are carefully worded and thus likely to generate valid responses. Particular care is needed when designing self-report questions for younger children. Ireson added (2007a, p. 5) that:

Diary methods could increase the accuracy of student responses, as information is provided in real time rather than relying on retrospective memory. However, diaries may be not be completed, or they may be lost, thus reducing the rate of return and hence the reliability of estimates. They may not be suitable for large surveys but would provide a means of checking the accuracy of information provided from student questionnaires.

Parents are an alternative source of information. They may not be well aware of additional classes provided at school for specific student groups, but parents may be expected to be reliable sources of information about the incidence of private tutoring as they are usually the ones who arrange tutoring for their children and they know how much it costs. Since English schools will not release details of parents' names and addresses, Ireson's research strategy was to send questionnaires home with the children. It is an uncertain method of delivery, but Ireson felt that she gained a reasonable response with return rates of 38 per cent from parents of children in Year 6, and 29 per cent from parents of children in Years 9 and 11. Regulations in other countries may not be so restrictive, so other approaches, including direct parental contact, may be possible.

Another way to secure data from parents is from household surveys. Tutoring can be an item in census-type questionnaires, such as the Vietnam Living Standards Surveys (Dang, 2007). However, many government ministries jostle to get their own questions included in surveys, and since private tutoring may not be seen as a priority it is unlikely that anything

more than the most basic of questions can be asked. An alternative approach, which has for example been used in Hong Kong (Bray and Kwok, 2003, p. 614) and England (Peters *et al.*, 2009, p. 2), is to undertake randomized telephone surveys. These also encounter limitations, including that respondents resent intrusion into their lives or do not have information on cost in their heads and therefore cannot instantly provide it, but can nevertheless generate useful data.

Tutorial schools, individual tutors, and tutoring agencies are also valuable sources of information. Cram schools and tutoring agencies can be relatively easily identified through advertisements and local directories. These advertisements are themselves an important source of information – particularly the extent to which they may make extravagant promises with ‘guaranteed’ results. Some advertisements are for companies which operate as chains, while others may be geographically limited in focus, which may make it difficult to build up a national picture. Individual tutors sometimes advertise themselves, but may recruit students entirely through personal recommendation in which case they are virtually invisible.

Ireson added (2007a, p. 5) that journalists who report on private tutoring often rely on interviews with directors of large agencies or with a few independent tutors. Such agencies should certainly know about their own businesses, but there could be a need for caution:

Firstly, an agency director who is willing to talk to journalists is likely to be doing well and keen to publicise the fact. Also, agencies use publicity of this kind as a source of free advertising and they know that parents may be persuaded to employ tutors if they think that this is the norm. So it is their interest to emphasize growth in their business.

In any case, even when such agencies are entirely unbiased, they are unlikely to be fully representative.

Turning from monitoring to evaluation, Taylor (2007, p. 11) outlined plans for the Making Good Progress scheme launched in England in 2007. She explained that the quality of teaching and learning would be evaluated through samples of tutoring sessions and tutoring plans. All schools were expected to provide attainment data for pupils undertaking tutoring at the beginning and end of the tutoring periods. Judgements on levels of attainment at the end of tutoring would be validated by the class teachers. Various tests and teacher assessment data were planned to permit continued tracking of pupils who had received tutoring and to compare their progress

with others. In due course a consultancy firm was contracted to evaluate the pilot, which was conducted in 450 primary and secondary schools in 10 Local Authorities (Pricewaterhouse Coopers, 2008). The evaluators' primary research was conducted in three workstreams as indicated in Table 16.

Table 16. Evaluation methodology for the 'Making Good Progress' pilot

School sample	Activity
Deep dive schools <i>One school from each Local Authority comprising 6 primary schools and 4 secondary schools</i>	<ul style="list-style-type: none"> • Visits to each school to: <ul style="list-style-type: none"> – interview key staff including the Headteacher, School Pilot Leader (SPL), Heads of Mathematics and English, a Governor, the Special Educational Needs Coordinator, a Progression tutor and other teachers; – administer a pupil survey in secondary schools (100 Year 8 pupils per school) or a focus group in primary schools (8-10 Year 5 pupils per school); and – administer a short (optional) teacher survey. • A survey of the parents/carers of approximately 100 pupils issued in hard copy with the help of the deep dive schools. • This built on an identical round of work completed 8 months previously and a series of telephone interviews with Headteachers or SPLs 4 months previously.
Light touch schools <i>Four schools from each Local Authority comprising 20 primary schools and 20 secondary schools</i>	<ul style="list-style-type: none"> • Telephone interviews with the Headteacher and/or SPL of each school. • A survey of the parents/carers of approximately 100 pupils issued in hard copy with the help of the light touch schools. • This built on a similar round of work completed 8 months previously (with a focus group being held with Headteachers/SPLs in each Local Authority in place of telephone interviews).
Population <i>All other Pilot schools</i>	<ul style="list-style-type: none"> • E-survey of all Headteachers (also issued 8 months previously). • Interviews with the 10 Local Authority Pilot Leaders (also conducted 8 and 4 months previously) to capture the wider experience of schools in each Local Authority.

Source: Pricewaterhouse Coopers (2008), p. 6.

Governments in other countries may not be able to use such sophisticated approaches, since they may lack skilled personnel and/or financial resources. Nevertheless, much can be achieved through existing government machinery. The Portuguese Ministry of Education decided

in 2005 to administer a simple questionnaire to senior secondary students as they registered for national university entrance examinations (Costa *et al.*, 2008). It asked about the subjects, locations, costs, and time spent on private tutoring. While it was a limited sample – only covering students aiming to proceed to universities rather than the total population of senior secondary school students – it was nevertheless very informative. The questionnaire could be completed either in paper format or online. It elicited a good response rate because participants were already motivated to complete the form for examination registration and at least some of them presumably felt that the separate form was part of the wider procedure.

An alternative way for governments to expand monitoring and evaluation capacity is through partnerships with universities and research institutes. The Mauritian case study presented above referred to an investigation by University of Mauritius researchers commissioned by the government (Joynathsing *et al.*, 1988). Similarly, in 2007 the Macao government recruited a research team from the Chinese University of Hong Kong to survey tutoring practices and parental views (Ho, 2008). The Open Society Institute has partnered with local policy ‘think-tanks’ to investigate private tutoring in the former socialist bloc (Silova *et al.*, 2006; Silova, 2009). Governments may also benefit from independent work carried out by university researchers, and from studies undertaken by international agencies (see e.g. UNESCO, 2000; World Bank, 2004).

Also worth mentioning is that initial mapping investigations in Uganda and Botswana were stimulated by the IIEP policy forum itself (Eilor, 2007; Makgothi, 2007). IIEP will be glad to assist with further work.

International benchmarking

Cross-national surveys also assist national policymakers and planners not only through their country-specific data but also by international benchmarking. Four existing surveys deserve particular attention.

The Third International Mathematics and Science Study (TIMSS) and its successor Trends in International Mathematics and Science Study (also called TIMSS) were conducted under the auspices of the International Association for the Evaluation of Educational Achievement (IEA). The first round of TIMSS testing in 1995 collected data from over 500,000 students of mathematics and science at five age or grade levels, and from

their teachers and principals in 45 countries (Martin, 1996, p. 1-2). The second round was conducted in 1999 and focused on mathematics and science at Grade 8 in 38 countries (Robitaille and Beaton, 2002, p. 11). The third round in 2003 collected comparable data from Grades 4 and 8 in 49 countries (Mullis, Martin *et al.*, 2005, pp. 3-4).

These studies produced very instructive data on shadow education alongside other variables (Baker, Akiba *et al.*, 2001; Wolf, 2002; Baker and LeTendre, 2005). Because the surveys were multifaceted, it was possible for analysts to make multiple correlations across different variables. They did, however, encounter methodological challenges. For the mathematics component of the 1995 survey, students in Grades 7 and 8 were asked: “During the week, how much time before or after school do you usually spend taking extra lessons/cramming school in mathematics?” (TIMSS, 1998, p. SQ 2-3). A similar question focused on science. The responses clearly involved much more than private tutoring, and could include extra coaching by teachers on an unremunerated basis as part of their normal workloads. Also, by only asking about extra lessons “during the week”, the question failed to capture seasonal variations. For the 2003 survey the question for Grade 8 students was refined to: “During this school year, how often have you had extra lessons or tutoring that is not part of your regular class in the following subjects” (TIMSS, 2003, p. 27). Respondents were then asked for information on mathematics, biology, earth science, chemistry and physics, with choices of “Every or almost every day”, “Once or twice a week”, “Sometimes”, and “Never or almost never”. Focus on the whole school year reduced the problem of seasonal variations, but perhaps did not eliminate it because the respondents would have had to make an average across high-peak and low-peak seasons; and the question still could not separate fee-free from fee-paying tutoring.

The second regular survey to be highlighted is the Southern and Eastern Africa Consortium for Monitoring Educational Quality (SACMEQ). In 1995 and 2000, SACMEQ collected data on extra classes received by Grade 6 pupils in six education systems (see *Table 3*, above). Again, the data contained ambiguities because some respondents included fee-free lessons alongside fee-paying tutoring. To refine the analysis, the 2007 version of the questionnaire, which was administered in 15 countries, asked more precise questions that had been pilot-tested in advance (Paviot, 2007; 2009). Thirteen questions were asked, with multiple-choice possible answers:

1. Did you take extra lessons in school subjects outside school hours during this school year?
2. In which school subjects did you take extra lessons outside school hours during this school year?
3. At what time during this school year did you take these extra lessons?
4. How often did you take these extra lessons during this school year?
5. How many children (including yourself) usually attended these extra lessons during this school year?
6. About how many hours did you spend on these extra lessons per week during this school year?
7. What did you do in these extra lessons during this school year?
8. Who gave you these extra lessons during this school year?
9. Where did you mostly take these extra lessons during this school year?
10. Who wanted you to take these extra lessons?
11. What was the main reason you took these extra lessons?
12. What did you think about the extra lessons that you took?
13. Was there any payment made to the person who gave you these extra lessons?

The question about payment, and therefore classification as private tutoring rather than public or other voluntary tutoring, came at the end. The researchers were aware, however, that ambiguities would remain. Grade 6 pupils might not have a strong grasp of whether or not the lessons required payment; and no questions were asked about the scale of payment. Pupils who did indicate that payments were involved were asked “whether this payment was based on money, on another kind of payment, or on a combination of both” (Paviot, 2007, p. 15). However, the SACMEQ Scientific Committee decided not to go further than this, recognizing that “the issue of payment was very sensitive and controversial in many places”. One of the challenges of cross-national studies is that they must cater for multiple national sensitivities, which can lead to instrumentation becoming blunted.

A third cross-national study to reference which has already been made was conducted by the Open Society Institute (OSI). Nine countries were covered in 2004-2005 (Silova *et al.*, 2006), and a further three countries using the same methods in 2005-2006 (Silova, 2009). In 2007, the OSI decided to repeat the studies in order to secure cross-national data

over time. In contrast to the TIMSS and SACMEQ studies which focused on primary and lower secondary students, these surveys focused on first-year university students who were asked to reflect on their tutoring experiences during the last year of secondary schooling. Since the respondents were older, the quality of their responses may in some respects have been more accurate. Only 2 of the 12 countries (Lithuania and Slovakia) were also covered in the TIMSS studies, but here it proved possible to compare findings and thus to gain a picture at different points in education systems.

The fourth major set of cross-national surveys to be mentioned is the Programme for International Student Assessment (PISA) of the Organisation for Economic Co-operation and Development (OECD). PISA has tested learning achievements of 15-year olds in multiple education systems (43 in 2000, 41 in 2003, and 58 in 2006). The 2006 parent questionnaire included data on total family education spending, but did not differentiate expenditures on tutoring from those on other items; and the student questionnaire collected data on out-of-school-time lessons, but did not differentiate lessons from private tutors from other lessons (OECD 2005, 2006*b*). The PISA team has discussed collection of more specific data on tutoring in future surveys, but is mindful of the conceptual and logistic challenges.

5. Conclusions

This final section begins by noting that private tutoring has become a global phenomenon, albeit with different characteristics in different countries. It has expanded substantially during recent decades, and has increasingly become a system in its own right. These facts demand greater attention. Policymakers and planners must confront shadow education systems in order to identify appropriate responses and proactive measures for their own contexts. The objective should not only be to control and steer: policymakers and planners can also learn much from the shadow.

Noting the trends

Summarizing his reflections at the close of the 2007 IIEP policy forum, Obeegadoo (2007, p. 6) observed that private tutoring “is fast spreading across frontiers and cultures, East and West, among rich and poor countries alike, in a context of creeping marketization and privatization of education”. This remark was echoed by other participants. To some extent, private tutoring occurs in a hidden marketplace (see Silova *et al.*, 2006); but over time the marketplace has become less hidden. To adapt the metaphor, private tutoring is emerging from the shadows and into the light.

Private tutoring has deep roots in many cultures, ranging from those of Western Europe to counterparts in Eastern Asia. Until the second half of the twentieth century, it was very modest in scale. It then became a major phenomenon in countries such as Japan and Korea and, towards the end of the century, in such countries as Azerbaijan, Cambodia, Mauritius, and Sri Lanka. By the beginning of the 21st century, private tutoring had become very visible in Eastern Europe and Central Asia, was increasingly evident in Western Europe, North America, Australasia and Africa, and was emerging in Latin America.

The forces promoting this growth have been different in different locations. In Georgia, Kyrgyzstan, and Tajikistan, for example, a major factor has been the inadequate salary level of mainstream teachers, which has forced them to find supplementary incomes to feed their families. By contrast, teachers in Hong Kong, Korea, Japan, and Singapore are relatively well paid, and the chief driving force has been the competitive nature of society and the scale of perceived rewards that can be achieved for new

generations by investment in tutoring. In the USA and England, private tutoring is to some extent a response to government initiatives to make schools more competitive as well as to raise the standards of low achievers; and in Uganda and Malawi it is allied to perceptions about a decline of quality in education systems.

One irony about the decline of quality is that in some settings it results from government efforts to expand fee-free primary and lower secondary education. What then happens is that, at least at the official level, schooling in the public system is free of charge, but the mainstream system is underpinned by a hidden privatization in the shadow which maintains social inequalities. During the IIEP policy forum, Kitaev (2007, p. 3) called attention to this irony. The growth of private tutoring, which demonstrates that at least some parents can and do pay for education even in 'fee-free' systems, raises questions about whether the fundamental ideology of fee-free education for all is still valid. The government of Botswana has taken this issue seriously, reintroducing fees at the secondary level on the grounds that at least some parents are able to pay and that resources for fee-free education can be targeted more productively to the sectors most in need (Makgothi, 2007).

Obeegadoo's remarks (2007, p. 6) also focused on both increasing demand and growing supply. Concerning the former, he observed that:

In the present age of knowledge, education and academic success especially are seen as determinant for the life chances of the individual and for the social and economic progress of the community. Changing labour markets and diversification of skills required by technology-driven economies translate into a public quest for increasingly varied educational opportunities and pathways.

At the same time, the supply of tutoring is increased not only by the fact that tutoring has become more socially acceptable but also by the forces of globalization which allow for outsourcing (see e.g. Nanda, 2005; Marlantes and Sunol, 2006; Ventura, 2008a). Tutoring can now be provided across borders, most obviously via the Internet, as well as locally. A further force identified by Obeegadoo is consumerism, which "creates the constant urge among teachers to make money as a measure of professional success and favours the flowering of an entrepreneurial culture within the teaching profession". Indeed the culture of the teaching profession has greatly changed in many countries, either under the influence of governments which have wanted to make education systems more competitive or as teachers and families respond to market signals.

In such circumstances, private tutoring will not simply go away. Some policymakers and planners have managed to ignore the phenomenon, but this is becoming less and less possible. Yet to advance from awareness of the issues to identification of specific policy measures is not easy. Tutoring is a very complex phenomenon, driven by multiple ingredients which vary across cultures, economies, geographic locations, and social classes. Moreover, the fact that Korean and Mauritian authorities have spent several decades trying to address the phenomenon with somewhat limited success is salutary. These cases underline the desirability of upstream planning, to mould the private tutoring system while it is modest in size, rather than waiting for it to become deep-rooted before proposing policy measures. They also stress the need for caution in such countries as Australia, England and France, where well-intentioned government initiatives to encourage tutoring for low achievers could change the cultures of school systems in unintended ways.

During the IIEP policy forum many agreed with Obeegadoo (2007, p. 6) that as far as possible the spread of tutoring:

should be prevented or preempted by addressing the perceived flaws and shortcomings within formal schooling. Depending on national contexts and realities, policy options may include doing away with high stake examinations, shoring up quality in the delivery of educational services, providing for more choice and variety in learning opportunities and modes including facilitation of private initiatives.

Instructively, it is not necessarily the case that more state spending on education will reduce household financing of tutoring. Indeed, rather to the contrary, the expansion of government work in the mainstream sector is likely to expand the size of the shadow. Much therefore depends on the scale of family disposable incomes and, even more importantly, on the attitudes of families to education in general and private tutoring in particular. Many families consider it desirable to use every possible channel to maximize their children's life chances, and will do whatever it takes to achieve that goal. In some societies, more may be achieved by non-academic focuses such as ballet, piano lessons, and religious education; but in other societies supplementation of mainstream schooling by focus on basic mathematics, languages, and sciences is perceived to be the best type of investment.

Where private tutoring is already common, a general prohibition is not a viable and effective option. Blanket bans have not succeeded

anywhere, though prohibition of mainstream teachers providing additional private tutoring to their own pupils may be desirable. In most countries, private tutoring needs to be confronted with more nuanced and multifaceted approaches. The most abusive and socially inequitable aspects of private tutoring need to be addressed by means of regulation. At the same time, governments may themselves have to get engaged in the sector by supporting tutoring for low-achieving students – provided that these governments have also thought about the wider consequences of such interventions for the cultures of school systems and the attitudes of parents, teachers and other actors.

Learning from the shadow

Policymakers and planners should not take tutoring as only a negative phenomenon – a sort of weed which invades a tidy garden. Rather, they should ask why parents are willing to invest considerable sums of money to supplement the schooling received from the mainstream. Why, indeed, do some parents want one-to-one tutoring; and why are others willing to pay for classes which may have 100 or even 1,000 participants? What can mainstream schools learn from the fact that at certain seasons their classrooms may be empty because pupils have resorted to paying bribes to allow them to attend tutorial centres instead? And what can policymakers learn from the tutors at the technological forefront who provide video-on-demand tutorials that can be downloaded to computers or hand-held devices and viewed in the subway or park as well as at school and at home?

One answer to these questions is that, at least in some cultures, the private tutors are more adventurous and client-oriented. Glasman (2007) pointed out that tutors in France tend to consider themselves more transparent, for example by giving more rapid and comprehensive feedback than the schools. He added that in the mainstream the standard response to low achievement is to ask the students to repeat the grade. By contrast, one tutoring company declares that if its tutees do not achieve, the parents can either have their money back or receive free tutoring the following year. In Korea, Kim observed (2007, p. 12) that most applicants for special high schools:

... tend to see the advantage of private institutes as ability grouping and differentiated curriculum, comparing to schools where all students learn together regardless of their ability. Their mothers want schools to do more individual care, care for not only students' behaviour but

also academic achievement from schools. The individual caring of private institutes is an important weapon to attract people and to make them rely on private institutes.

Kim added that this tendency was partly related to changes in the nature of Korean families. With a greater likelihood that both parents are working, and increased geographic mobility which means that grandparents are less likely to live close to their grandchildren, parents see tutoring institutes as a way to provide personal attention that can no longer be provided by families, and perhaps was never provided by schools.

The fact that the technologies of downloadable tutoring are also evident in Korea and point in a rather different direction may be perplexing to policymakers. Choe (2009, p. 14) pointed out that Korea is pouring billions of dollars into making its Internet 10 times faster within five years. The fact that pupils can skip or fast-forward parts of the downloaded lessons, and bookmark and repeat other parts, may give these pupils a flexibility that they would not have in face-to-face teaching. As such, off-line lessons may increasingly supplement online and face-to-face schooling. Such off-line lessons could of course be provided by the government authorities as well as by the private sector, but it seems that at present the private sector is leading the way. One Internet leader in the tutorial business (quoted by Choe, 2009, p. 4) suggested that in the future “students will [only] go to school, perhaps once a week, for group activities like sports”. This is perhaps a somewhat extreme prediction, but it could certainly fit certain types of pupil in certain types of environment – particularly highly-motivated students at the season of their examinations.

In other circumstances, however, tutorial schools seem to provide a rather different service of increasing rather than decreasing human contact. Thus, the changing nature of families has also been observed by Sou (2007, p. 4) with reference to Macao, where an increasing number of tutorial centres provide child-care facilities in “one continuous line”:

At noon time after school, the tutorial centre is responsible to take the children to the centre to be taken care of and to provide them with lunch. Then children are taken back to school to continue the lessons in the afternoon. After school, children are taken back to the tutorial centre to have the service of homework guidance till their parents come to fetch them after work.

Yet there is perhaps no strong reason why schools themselves cannot be more accommodating to these needs. In England, the authorities are experimenting with an extended day lasting from 8.00 am to 6.00 pm, and many schools already provide supervised lunchtime activities (Ireson, 2007b). In Macao, the government launched a School Communitization Scheme in 2002 which opened some school facilities to the community. Also, for older students the Macao government has organized study rooms, sponsoring civic organizations to run them; and since 1997 the Macao government has operated a phone-in service for homework guidance (Sou, 2007, p. 9).

Turning back to the substitution of school and tutorial centre, Hartmann's study in Egypt reports a sharp comment from one pupil (2008, p. 57) who associated time spent in school with lower-level performance: "If I stopped going to school and just took private lessons, that would be better." Of course, this pupil was only looking at matters from her own perspective, and governments have broader goals for schooling which include socialization, nation-building and balanced development through sports as well as academic achievement. Nevertheless, education authorities would be wise to consider ways to alleviate the anxieties of pupils during the peak periods before major public examinations. Educators may lament that at these seasons the broader dimensions of education are neglected; but pupils and their families note very perceptively the choices required by the system, and if the tutoring is holding up a mirror to the mainstream to show what the mainstream is perceived to lack, then schools might usefully work harder to accommodate the need.

In practice, in at least some societies, schools are indeed responding. Tan (2007) reported that in Singapore tutoring centres have tried to get ahead of the mainstream schools to teach the curriculum in advance. Subsequently the schools themselves accelerated the curriculum, at least for some pupils, with the result that the tutorial centres and the mainstream schools were in effect converging. Korea's high school equalization policy is perceived to have fuelled rather than reduced the demand for private tutoring, and the need for greater flexibility has caused the Korean authorities to reconsider the nature and goals of equalisation policy.

Thus, while the authorities should perhaps not get too defensive, there may be much that can be learned from the shadow education system. This again underlines the value of close attention to the phenomenon. One of the most problematic approaches for policymakers and planners would

be to ignore the shadow education system. More positively, policymakers and planners can learn from the shadow; and in all settings they should consider the wider picture of its educational, social, and economic features. This book has demonstrated that much can be learned from comparative analysis of experiences in different countries.

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Index

A

academic 11-12, 24-25, 40, 51, 57,
69, 74-75, 87, 89, 102
achievement 33, 105-106
subjects 15, 50
adverse effects (of private tutoring)
87, 100
advertisements 67, 95
Africa 20-21, 24, 27, 41, 78, 98, 101
after-school tutoring *see tutoring*
Asia 19-20, 36-37, 52, 87, 101
Australasia 24, 101
Australia 12, 23, 38-39, 72, 75, 92,
103
Austria 22, 77, 89, 114
Azerbaijan 19-20, 37, 42, 79, 101

B

Bangladesh 19, 35, 37, 86, 119
benchmark 39-40
Bosnia and Herzegovina 19-20, 37
Botswana 12, 97, 102
Brazil 23
broadcasts 27
burden 47-49, 51, 58, 65, 73

C

Cambodia 17-18, 35, 76, 85, 101
Canada 17-18, 23, 29, 38, 68
Toronto 38
Vancouver 38
Caucasus 79
Central Asia 79, 101
China 18-19, 27-28, 38, 48, 125

classroom 13, 43, 46, 58, 84, 104
curriculum 43-44
teaching 32, 56
college entrance system 52-53, 115
compulsory education 49
Confucian traditions 24
Confucianism 48
consumers *see also parents* 14, 17-19,
25-26, 35-36, 38, 56, 65, 67, 79
consumption of tutoring 37
corruption 11, 14, 27, 53, 80-81, 92
cost-effectiveness 40
costs 18, 22, 25, 27, 31, 41, 50, 65,
69, 73, 84, 94, 97
Croatia 19-20, 37
cultures 15, 18, 30, 36, 101, 103-104
curriculum 13, 26-27, 44-45, 48,
62-64, 66, 79, 88, 104, 106
Cyprus 18

D

demand for (private) tutoring
see tutoring
disparities *see also equality* 34-35,
43, 46, 59-60

E

East Asia 11, 24, 78
Eastern Europe 19-20, 24, 36-37, 87,
101, 121, 124
economic 11, 13, 17, 30-32, 34, 40,
47, 56-57, 65, 68, 71, 76, 102
burden 47, 58
impact 30

implications 11, 14, 63, 73
education systems 11, 24, 27, 77-78,
81, 98, 100-103
educational achievement *see also*
academic achievement 39, 41, 52,
65, 76
educational impact *see impact*
educational, social and economic
features 107
educators 13, 106
Egypt 18-19, 31, 33, 35, 37, 44, 76,
78, 86, 106
England 22, 38-39, 41, 75, 82, 91-92,
95, 102-103, 106
enrolments 34, 49, 68
equality *see also disparities* 34-35, 72
ethnicity *see also race* 38, 41, 72-73,
81
evaluation 15, 40-42, 52, 65, 81,
93-100
examination(s) 20, 25, 39, 41-42,
46-48, 50, 53, 56-61, 64, 72, 74,
77, 81, 97, 103, 105-106
civil service examinations 48
entrance examination 19, 25, 48,
50, 54, 74, 97
external examinations 42
high-school/middle-school
examination 49
nature of examinations 77
extracurricular (activities) 51-53

F

family expenditures on education 21
fee-free education 102
France 12, 22, 30, 33, 47, 65-70, 71,
75, 86, 92, 103-104
franchises/franchising system 29, 73,
75

G

gender 34-36, 72-73, 81
Georgia 19-20, 37, 79, 101
Germany 68, 86
government 18, 22-24, 29, 31-32,
38-39, 41-42, 47-48, 50-51, 53-55,
57-58, 61, 65-66, 69-73, 75-78,
85-86, 89, 91-92, 94, 96-97,
102-106
expenditure 30, 47
policies 14, 24, 27, 29
Greece 23, 30, 85
Gross Domestic Product
(GDP) 7, 18, 30-31, 47, 64

H

hakwons (Korea) *see also tutoring*
47, 53, 56, 89
high achievers 14, 24, 43, 46, 72, 78
high-income countries 17
Hong Kong 18-19, 24, 28, 38, 95, 97,
101
household
expenditure(s) 18, 30, 47
financing of tutoring 18, 21, 30-31,
103
surveys 18, 37, 94
human capital 13, 31

I

IIEP's policy forum 12, 13, 19-22, 24,
34, 36, 39, 41, 47, 54, 61-63, 73,
89, 97, 101-103
impact (of tutoring) 11, 30, 39, 41,
44-46, 60, 71
economic 30-46
educational 30-46
social 30-46

implications 13-14, 66, 74, 77, 81
 economic 11, 14, 63, 73
 pedagogic 27, 63
 policy 14, 27, 29

income group 72-73

India 21, 26, 28, 32, 34, 36, 89
 Andhra Pradesh 21, 26, 37
 Kerala 21, 26, 37
 Maharashtra 21, 26, 37, 90
 Uttar Pradesh 21, 26, 37
 West Bengal 21, 76

instrument of economic and social
 change 47

intensity/intensities *see tutoring*

Internet 14, 17, 27-29, 52-53, 67,
 72-73, 79, 102, 105

Ireland 23

J

Japan 10-11, 17-19, 24, 28, 51, 72,
 74, 89

juku (Japan) *see also tutoring* 18, 29,
 74-75, 89

K

Kazakhstan 20, 36-37, 79, 87-89

Kenya 17, 19, 21, 34-35, 76

Korea 12, 24, 27, 30-31, 35, 43, 47,
 54, 65, 68, 71-72, 76-77, 86, 89,
 101, 104-106

Kumon 28-29

Kyrgyzstan 20, 35, 37, 79, 81, 101,
 109

L

language 15, 26, 28-29, 31, 49, 51,
 81, 87-88, 103

Latin America 23-34, 101

Lithuania 19-20, 37, 87-88, 100

low academic performance 75

low-income 59, 86

 countries 17

 families 41, 57

 households 32, 75

M

Macao 27, 90, 97, 105-106

mainland China *see China*

mainstream 13, 15, 17, 23, 27, 29-30,
 32, 34, 36, 38, 42-45, 53, 59,
 71-72, 76, 78-79, 85, 87-88,
 102-104, 106

education system(s) 11, 13, 34-35,
 42, 44-45, 71, 77

schooling 34, 52, 78, 103

teachers 13, 15, 17, 22, 27, 30, 43,
 45-46, 51, 80, 89-90, 92, 101,
 104

Malawi 21, 102

market forces 14-15, 38, 71, 76

market-driven tutoring 14, 42-44

marketization and privatization of
 education 101

Mauritius 21, 25, 43, 47, 54-64, 68,
 71-72, 76-77, 80, 84, 97, 101

Mongolia 19-20, 37, 79, 87-88

monitor/monitoring *see tutoring*

mother tongue 26

motivation of teachers 85

N

Namibia 21, 25, 90, 119

No Child Left Behind (NCLB) 23,
 29, 32, 38, 40, 43, 76

non-formal education 87

non-governmental organizations
(NGOs) 86
North America 24, 101

O

one-to-one tutoring *see tutoring*
opportunity cost 31
Organisation for Economic
Co-operation and Development
(OECD) 11, 48, 64, 100

P

parents *see also consumers* 12-13,
17, 22-24, 27, 29, 31-34, 39-40,
45, 47-48, 50-52, 56-63, 65-67,
69, 75, 77-78, 82-86, 88-89, 91,
93-96, 102, 104-105
patterns (of tutoring) *see tutoring*
planners *see also policymakers,*
politicians, practitioners 11-12,
14-15, 24, 29-30, 78, 97, 101,
103-104, 106-107
Poland 20, 37
policies 12, 14-15, 24, 27, 29, 47, 54,
58, 60, 62, 69, 71, 76, 83
policy forum (IIEP) *see IIEP's policy*
forum
policy implications *see implications*
policymakers *see also planners,*
politicians, practitioners 11-12,
14-15, 24, 29-30, 60, 64, 71-74,
76, 78, 81, 84, 93, 97, 101,
103-107
politicians *see also planners,*
policymakers, practitioners 13, 57
Portugal 25, 90, 96-97
practitioners *see also planners,*
policymakers, politicians 12

private supplementary tutoring/
private tutoring/private tuition
11-15, 17-39, 42-60, 62-66, 68-69,
71-73, 76-77, 79-80, 82, 84-85,
87-90, 93-95, 97-99, 101-104, 106
nature and role 65
size and shape 13-14, 17, 93
private tutor(s)/tutors 12-14, 17, 23,
27-28, 30-31, 36, 38-41, 43-47,
50, 52, 58-59, 62, 66-67, 69, 76,
79, 82, 84-86, 88-93, 95 100, 104
privatization 101-102
prohibition (of tutoring) 49-52,
58-60, 76, 92, 104
provide child-care facilities 105
providers *see tutoring*

Q

quality 39, 52, 69, 72, 79, 86, 90,
100, 102-103
assurance 60, 82-84
of service 28, 103
of teaching 55, 59, 95

R

race *see also ethnicity* 38, 41, 56, 72
receiving tutoring *see consumers*
regulations 28, 50, 57-59, 88-92, 94
researchers 12, 17, 19, 35, 39, 93, 97,
99
revenue 24, 45, 85, 90

S

scale *see also tutoring* 14, 17, 19-20,
24, 28, 30, 47, 91, 99, 101, 103
school
cram schools 30, 50, 95

elementary/primary and secondary
 school 18-19, 22, 25, 33-35,
 41-42, 49-52, 55-56, 58-62,
 65-66, 78, 88, 96
 premises 22, 56, 58, 60, 62, 88
 private 65
 public 41, 65, 89
 subjects 15, 87-88, 99
 shadow education (system) 11, 14-15,
 28, 34, 38, 71, 77, 86, 98, 101,
 106-107
 Singapore 25, 28, 41, 72, 75-76, 90,
 101, 106
 Slovakia 19-20, 37, 87-88, 100
 social and economic 11, 17, 57, 71,
 102, 107
 advancement 56
 forces 65
 inequalities 13
 social and political goals 42
 social
 classes 66, 103
 impact *see impact*
 inequalities 13, 32, 36, 38, 46, 48,
 64, 66, 69, 71, 102
 social, economic and educational
 impact (of tutoring) *see impact*
 South Africa 27, 41
 South Asia 24
 Soviet Union 19
 Sri Lanka 31, 101
 stratification 65
 students
 high school students 42, 47, 49, 51
 low-achieving students 104
 minority students 38
 senior secondary students 91, 97
 subjects *see academic subjects*

T

Taiwan 24, 38, 85, 117
 Tajikistan 20, 31, 37, 79, 87-89, 101
 Tanzania 21
 taxation 32, 66, 69, 73, 89
 incentive(s) 65, 67, 75, 89
 income 32
 technology 29, 102
 tests *see also examinations* 38-39, 57,
 75, 80, 95
 total ban *see also prohibition* 76
 transition rates 77-78
 Turkey 22, 30, 34, 42, 76
 tutoring 32, 35, 38, 42, 48, 53, 56-57,
 62, 64, 71, 75-79, 106
 demand 32, 35, 38, 42, 48, 53,
 56-57, 62, 64, 71, 75-79, 106
 duration 17, 25, 93
 frequency 26, 60
 format/mode/types 12, 14, 17,
 19-20, 27-28, 30, 47, 72-75, 78,
 93
 after-school 41, 48, 50, 52, 67
 one-to-one 14, 22, 29, 39, 41,
 72-73, 78, 89, 104
 Internet 14, 17, 27-29, 52-53,
 72-73, 102
 institute 23, 32, 43, 47, 51, 53-54,
 56, 79, 86, 104-105
 hakwons (Korea) 47, 53, 56, 89
 juku (Japan) 18, 29, 74-75, 89
 intensity/intensities 14, 17, 20, 24-26,
 30, 43, 56, 66, 72, 93
 location(s) 23, 36, 56-57, 60, 62, 68,
 72-73, 83, 88, 97, 101, 103
 rural/urban 18-20, 23-24, 28,
 35-38, 51, 68, 72, 76, 81
 monitor/monitoring 12, 15, 66,
 83-85, 93-100

patterns 12, 14-15, 17-19, 23-24, 36,
42, 72, 91, 93
providers 17, 22-23, 28-29, 34, 44,
69, 73, 76, 79, 85, 89
scale 14, 17, 19-20, 24, 30, 47, 101
supply 15, 36, 38, 64, 71, 79-80, 102

U

Uganda 20-21, 76, 91, 97, 102
Ukraine 20, 37, 87-88
United States of America (USA) 23,
28-29, 32, 38-39, 43, 68, 72,
75-76, 102
Chicago 40

V

Viet Nam 19, 25, 35, 38

W

Western Europe 22-24, 101

Z

Zambia 21
Zanzibar 21, 84-85

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This book focuses on the so-called shadow education system of private supplementary tutoring. In parts of East Asia in particular, such tutoring has long existed on a large scale. It is now becoming increasingly evident in other parts of Asia and in Africa, Europe and North America. Pupils commonly receive fee-free education in public schools and then at the end of the day and/or during week-ends and vacations receive supplementary tutoring in the same subjects on a fee-paying basis.

Supplementary private tutoring can have positive dimensions. It helps students to cover the curriculum, provides a structured occupation for young people outside school hours, and provides incomes for the tutors. However, tutoring may also have negative dimensions. If left to market forces, tutoring is likely to maintain and increase social inequalities, and it can create excessive pressure for young people who have inadequate time for non-academic activities. Especially problematic are situations in which school teachers provide extra tutoring in exchange for fees from the pupils for whom the teachers are already responsible as part of their normal jobs.

This book begins by surveying the scale, nature and implications of the shadow education system in a range of settings. It then identifies possible government responses to the phenomenon. It encourages a proactive approach through which governments determine which types of tutoring they consider desirable and which types are problematic, and then design appropriate policies.

About the author

Mark Bray is Director of UNESCO's International Institute for Educational Planning (IIEP). His 1999 book on the shadow education system, also published by IIEP, was the first of its kind and has been widely cited. His subsequent work on the theme has been a major ingredient for the present book. Mark Bray has also published extensively in the fields of comparative education, and administration and financing of education.