

The evolution of shadow education in China: From emergence to capitalisation

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ABSTRACT

Private supplementary tutoring, or shadow education, has become a global phenomenon, and China is among the countries where it is most prevalent. By 2019, China's private tutoring industry had grown into a prominent sector providing educational services to millions of students and parents. This article examines the development process of shadow education in China, and explores the path that led to its current prevalence. Drawing on existing literature and publicly available data sources, the article maps key stages of shadow education's evolution and its changing characteristics. The analysis suggests that China's private tutoring industry has undergone three stages of evolution: first, the emergence stage, when small numbers of individuals started to provide tutoring on an informal basis; second, the industrialisation stage, when institutionalised providers became primary providers of more formal types of tutoring services; and third, the capitalisation stage, when major providers of shadow education evolved into part of the educational capital market. The discussion argues that the development trajectory of shadow education occurred in line with the continued marketisation of education in China. The article also addresses the implications of capitalised shadow education as it enters a more intensified and controversial phase of development.

KEYWORDS

supplementary education, private tutoring, educational development, shadow education, industrialisation, capitalisation

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INTRODUCTION

During the first two decades of the 21st century, the reach and influence of shadow education became all the more profound across continents. Whether provided at the home of a Myanmar student, taught in a fully packed classroom of a Greek *frontistirion*, or live-streamed on a Korean student's tablet computer, private supplementary tutoring is a significant part of many students' outside-school experiences today (Feng & Bray, 2019). Along with its growing popularity, shadow education provisions have changed shapes over the years. Students and families are now facing an increasingly industrialised tutoring sector, and in many places commercial companies' standardised services have replaced individual tutors' informal instructions as the dominant source of provision (Kim & Jung, 2019).

In East Asia, which Manzon and Areepattamannil (2014, p. 389) described as “a cradle of private tutoring”, shadow education has long been a major phenomenon. Both high rates of participation and high levels of industrialised provision have been reported in countries such as China, Japan and South Korea (Bray, 2020; Bray & Lykins, 2012; Kim & Jung, 2019; Manzon & Areepattamannil, 2014). In these societies, industrialised supplies of shadow education have become a new normal in the 2020s, and a study about private tutoring's developing patterns may complement the existing research literature in the field. These changes in supply have also brought challenges to the conventional conception of shadow education, which was initially used by researchers to define the types of tutoring that mimic regular schooling on academic subjects (e.g. Bray, 1999; Stevenson & Baker, 1992). In the more recent research literature, the expansion of the private tutoring industry is implicated in the expanded definitions of private supplementary tutoring and their inclusion of more diverse types of tutoring beyond the conventional “shadowing” of school education (Aurini, Davies, & Dierkes, 2013; Bray, 2017; Feng & Bray, 2019; Park, Buchmann, Choi, & Merry, 2016).

This paper explores the waves of evolution of shadow education provisions in China's changing society. In many ways, China resembles her East Asian neighbours. They have a shared Confucian cultural foundation, attach great value to education, and are highly competitive (Sun, 2013; Yang, 2011). In other ways, however, China is distinctive. It is one of the few remaining socialist countries, but shifted to a neoliberal market economy after the 1980s (Coase & Wang, 2012; Zhang & Bray, 2017). It is a heavily populated rising power with a dynamic economy (Wu, 2019); and it is also run by an authoritarian government in a single-party political system.

These characteristics have underpinned the development of the shadow education industry in China. Since the 1980s, private supplementary tutoring has emerged, grown, and evolved along with China's fast-growing economy and changing policies. Within 40 years, what used to be school-teachers' after-class home tuition has grown into an industry worth billions of RMB (Chinese yuan), and equipped with artificial intelligence and block-chain applications. In this context, process of industrialisation of China's shadow education supply is an interesting case for analysis that will benefit further understandings of the phenomenon in China and beyond.

For these purposes, this paper reviews relevant research literature and publicly available documents such as educational policies and statistics, industry reports and media coverage. The following sections begin with a brief overview of China's social and cultural context before the 1980s. The paper then presents a trilogy of development stages of shadow education in China, from the emergence stage, the industrialisation stage, to the capitalisation stage. Finally, the



paper offers a discussion on the implications of this process before suggesting areas for further empirical research.

Education and society in China before the 1980s

Although this paper focuses on the development of shadow education in China since the 1980s, some aspects of the historical and cultural context are relevant. The Confucian culture runs deep in the Chinese society, and education is one of the cornerstones of Confucianism. In China's imperial era, the selection of candidates for the civil service was based on examinations which tested classical studies on Confucian canons (Feng, 1995; Gu, 2006). For thousands of years, education about Confucianism had been an essential social channel for individuals to become part of the higher class (Sun, 2013). In today's Chinese society, the Confucian culture might still be found in many social and cultural aspects, and the role of education is still vital to many Chinese families (Wang, 2013).

In China's imperial era, education, especially at the basic level, was mainly organised in the form of home schools, and wealthy families and communities hired scholars to teach at their homes or in community classrooms. In some literature (e.g. Elman, 2013), these Confucian scholars are also referred to as private tutors, but the education they provided should be distinguished from the modern definitions of private supplementary tutoring (e.g. Bray, 1999; Feng & Bray, 2019).

In 1911, the imperial era ended with the demise of the Qing Dynasty. However, a new modern state did not immediately arrive, and attempts to build a modern national education system failed as the country encountered constant civil conflicts and foreign invasion in the ensuing four decades (Sun, 2000; Walder, 2015). When Mao Zedong declared the establishment of the People's Republic of China in 1949, a modern nation-state which effectively controlled its territory was established for the first time in the 20th century (Walder, 2015).

In the Mao era, a modern education system was eventually established during the 1950s and 1960s following the Soviet model (Gu, 2004; Walder, 2015). Like many of his other ideas, Mao's education policies were largely influenced by his radical egalitarian ideals of socialism. Especially during the Cultural Revolution, Mao pushed for a "redness" doctrine which viewed education as a device to convey Marxist-Leninist revolutionary values and focused on educating the lower class of workers and peasants (Pepper, 2000; Walder, 2015). Following this direction, less priority was given to higher education. Rather, programmes with part-work part-study schemes for the alliance of workers and peasants were prioritised, which "aimed at achieving mass literacy, providing local initiative, expanding rural educational opportunities, [and] encouraging curricular and structural innovation" (Saywell, 1980, p. 2). Mao also ordered the abolition of school entrance examinations, which had long been a key component of education in China (Andreas, 2004). The new admission system heavily stressed the candidates' class backgrounds and political loyalties. For example, high school graduates had to work for one or two years before they could be recommended by their own work units to enter universities (Pepper, 2000, p. 384; Saywell, 1980).

During the Mao era, like most of the other private elements in China's social-economic context, privateness in education was removed from the spectrum. Private schools and universities were taken over by the state and transformed or merged into public universities (Zheng, 2005). On and off the campus, teachers were supposed to put unreserved efforts into helping the



students, and any form of fee-charging tutoring or coaching provided by the teachers would have been considered unethical (Pepper, 2000). Chinese scholars at the time criticised the role that private tutoring classes played in the Soviet Union, as these classes mainly served the reproduction desires of the privileged class (He & Wang, 1976).

After his death in 1976, Mao left complex legacies to China. In education, many gains had been derived from the executive efficiency of a modern bureaucracy, while many losses had been caused by the backfires of Mao's radical political ideas (Walder, 2015). One example of the gains was China's literacy progress. After four rounds of massive campaigns, the illiteracy rates for young and middle-aged peasants had decreased from 80% in 1949 to 30% in the early 1980s (Bhola, 1984). However, the education system that Mao had behind was broken. Universities were severely damaged, and schools valued practical labour over academic subjects. The growing literate population needed an efficient education system which could provide higher levels of knowledge, training and development. In response to these educational demands, a new wave of reform rose amidst the pieces of Mao's legacies.

The emergence of shadow education

An important theme of China's policy framework in the 1980s was its turn toward a market economy and neoliberalism led by the "reform and opening-up" policy (Hannum, Behrman, Wang, & Liu, 2008; So & Chu, 2012). In education, the new policy direction led to two important developments: the restoration of examinations in the education system, and financial reforms in basic education (Tsang, 1996; Yu & Suen, 2005).

In 1977, the restoration of China's National College Entrance Examination (NCEE) signalled the beginning of policy reforms in education. More than 5.7 million candidates, some of whom had waited for 10 years, took the first test of the resumed NCEE; and it has been considered to be a crucial determinant of a Chinese student's life chances since then (Feng, 1995; Postiglione, 2014). The NCEE is widely compared with a "conductor's baton" which directs the subordinate secondary and elementary education focuses (Liu & Wu, 2006, p. 11). Following the baton of the NCEE, entrance examinations to lower and upper secondary schools were also restored. The purpose of restoring the examinations was to select qualified individuals for higher levels of schools or universities, but the examinations soon became the centre of education for many students and families. At the same time, as the government decided to abandon the egalitarian model and pursue quality education, there were changes in the schools' financial structures. Across the country, funding and support were concentrated to small numbers of key schools (You, 2007), while many schools were left with budget cuts and lack of resources (Tsang, 1996).

Both of these contexts were conducive to shadow education's emergence in the 1980s. The restored examination system offered a meritocratic solution to social mobility (Liu & Wu, 2006), and it fuelled the demand for private tutoring as parents wanted their children to succeed in the high-stakes examinations (Yu & Suen, 2005; Zhang & Bray, 2015). On the providing end, schools and teachers facing financial difficulties had to support themselves with alternative sources of income outside the public system, and tutoring could serve this purpose by bringing in additional fees (Tsang & Ding, 2005).

During the 1980s and 1990s, different forms of shadow education started to emerge across China. As in many post-socialist countries, underpaid teachers played a central role in the provision of tutoring classes (Kobakhidze, 2018; Silova, 2009). In Shanghai, Zhuang (1990) reported



that 20% of the graduates from 10 local primary schools had received home tutoring from a teacher in order to enhance their chances to enrol in better secondary schools or to catch up with their peers. Other individuals, especially students from teachers' colleges or normal universities and retired teachers, were also reported to have provided individual-based home tutoring (Yang, 1986; Zhuang, 1990). Various forms of home tutoring characterised the initial shape of shadow education in China. In after-school hours and at weekends, tutoring might take place at the students' or the tutors' homes, and could involve one or more students in each session.

More organised tutoring also emerged during this period as schools sought additional incomes from tutoring to fund their operations amid financial insufficiency (Hannum et al., 2008; Tsang & Ding, 2005). Unlike tutoring provided by individual tutors which could take place during both school days and holidays, the tutoring classes organised by schools mostly operated during school holidays (Li, 2009; Wu & Wang, 1996). Compared to individual provisions, school-organised tutoring classes were more institutionalised forms of shadow education as teachers of different subjects were mobilised and collaborated to provide fee-charging tutoring. Wu and Wang (1996) argued that the schools' tutoring activities were inevitable because schools were under the triple-pressure to meet the performance indicators set by managerialist policies, the teachers' needs for compensating their low salaries, and the parents' demand for additional academic help.

These had long been vital for a Confucian heritage society, and the financial restrictions in basic education propelled teachers' engagement in private tutoring operations. In addition, as a relatively new phenomenon, private tutoring received little policy attention at its emergence stage. Many of the teachers' and schools' tutoring activities crossed the boundaries of professionalism and sometimes raised ethical concerns about corruption along the same lines as in other Asian countries (Bray, Kobakhidze, & Kwo, 2020; Bray, Kobakhidze, Liu, & Zhang, 2016; Silova, 2009). These activities were not sufficiently regulated, and regulations on teachers' professional conduct were not strictly implemented at this early stage of development.

Industrialised provision of shadow education

From the late 1990s to the new millennium, private tutoring in China moved through a fast-changing stage of industrialisation. Individual-based home tutoring or schools' holiday tutoring classes slowly diminished, and the services provided by commercial tutoring companies outside schools became the primary form of tutoring provision.

Many factors underlay the shift. First, the under-addressed issues about mainstream teachers' involvement in shadow education and challenges to fairness in education gradually gained policy attention, and laws and regulations were draughted to restrict tutoring provided by schools and teachers. The authorities at different levels considered the fee-paying tutoring provided by school-teachers unethical and introduced prohibitions; tutoring classes into schools were also removed when the government targeted arbitrary charges of school fees (Ministry of Education, 2015; Zhu, 1996). These policies effectively reduced the involvement of mainstream teachers and schools in shadow education. Facing the choice between maintaining their jobs and earning additional wages, most teachers chose to cease their tutoring practices, but some decided to become full-time tutors or to found commercialised tutorial centres.

Another important driver was the intensification of China's examination culture which provided a further ground for tutoring to prevail. Between 1998 and the early 2004, China



expanded university enrolments by more than 400% (Wan, 2006). The expansion of higher education was initially proposed to ease the immediate pressure of unemployment in the aftermath of the 1997 financial crisis, but it also gave more students the opportunity to join the race in higher education. At the same time, China's economy began to grow rapidly, and the general Chinese families had more financial means to purchase tutoring services in the exam-driven education fever (Yu & Suen, 2005).

These elements allowed for the tutoring industry's fast expansion in terms of both influence and economic importance. In 2004, the Urban Household Education and Employment Survey of 4,772 households indicated that 73.8% of primary school students had received tutoring lessons in both academic and non-academic subjects (Xue & Ding, 2009). By 2016, the market value of China's private tutoring business in primary and secondary education had reached 800 billion RMB (Ma, 2016).

At this stage, the division of labour and more standardised operation procedures in tutoring companies constituted an important feature of China's tutoring industry. Sales and operations staff in tutorial centres brought more clients to tutors than individual provision could possibly do, and revenue-driven managers pushed the tutors to design their instruction to fit the students' needs. At the previous emergence stage, the content of instruction was mainly determined by the teachers, but in the commercialised tutorial centres, it was highly concentrated on examination preparation and test-taking techniques (Chen & Chen, 2015). Using uniform teaching materials and curricula, the tutoring courses also became more standardised in the companies, making the success in one company's operation more repeatable in another. When the provision of tutoring became industrialised, national and regional chains of tutorial centres started to expand, overshadowing the smaller and independent ones (Ren, 2018). During this process, a few successful tutoring companies took the lead in the market, which eventually became capitalised corporations.

Capitalised tutoring corporations and beyond

The capitalisation of China's tutoring industry mainly occurred in the new millennium, and the listed tutoring corporations in global stock markets marked this process.

In the 2000s, a few tutoring companies became successful and operated hundreds of branches. Their expansion and the exponential growth of the tutoring market attracted the attention of international investors. With hopes to profit from the financial market, venture capital and private equities introduced millions worth of capital to large tutoring companies, the leaders of which became tutoring tycoons (Li, 2012). By 2019, there were more than 20 listed Chinese tutoring companies on stock markets in Mainland China, Hong Kong and the United States (Lyu & Lyu, 2019). Although there are precedents for Japanese and South Korean tutoring companies to become listed on stock markets (e.g. Riso Kyoiku Co., Ltd., Chungdahm Learning Inc.), their connections to the market capital are mostly confined to the respective domestic market. However, in the Chinese case, the tutorial centres embraced international capitals and utilised the vast amount of investment to extend their reach even further, representing a shadow education industry that operates on a more globalised stage.

The capitalisation has brought major changes to China's tutoring industry and transcended many boundaries of conventional tutoring. Traditionally, tutorial centres mimicked the operation and teaching of mainstream schools, and the range of courses that they could provide was



limited to certain subjects or grades. Large tutorial chains could develop more inclusive tutoring services offered by multiple departments under the same company to maximise profitability. Some of the tutoring services that the tutorial chains provide today, such as arts, music, robotics and programming, have evolved beyond the scope of mainstream schooling, and the parameters of tutoring have thus become blurred (Bray, 2010).

At the stage of capitalisation, the tutoring industry has also developed beyond geographical boundaries. This is not only because more tutorial centres are cloned in different places through chained or franchised operations, but also because new technologies have created new ways of tutoring instructions. Since the early 2010s, online tutoring has been increasingly visible in China's major tutoring companies, and the internet allows tutors from one city to communicate with students in multiple places simultaneously (Mindtime Think Tank, 2019). Further, an online-offline dual-tutors model has gained popularity in some of China's tutoring giants (iResearch Consultancy, 2018). In this model, the online tutor mainly delivers the course through live streaming, and the offline assistant tutor helps to interact with students, answer their questions, and review their homework. These changes manifest how the tutoring industry has gradually grown larger than the "shadow" of mainstream education, while developing its own logic of operation.

At the stage of capitalisation, leading tutoring corporations have become new forces in the capital market. With the revenue generated from their key business of tutoring services, these corporations have invested in a wider range of areas connected with private tutoring, such as private schooling, textbooks, tutor training, online streaming platforms, and overseas education (Bai, Tang, Li, & Fan, 2019; New Oriental, 2019; TAL Education Group, 2020).

Returns from the various sectors can enhance the tutoring corporations' ability to compete and to cope with market recessions (Lyu & Lyu, 2019). In 2016, different levels of governments in China started to tighten restrictions on private tutoring. Many new regulations were enacted to regulate the contents, durations, venues and qualifications in the tutoring industry (Liu, 2018). These policies have had a significant impact on the private tutoring industry, but the capitalised corporations have suffered fewer losses because of their better compliance capabilities compared to smaller centres. Similar remarks applied during the COVID-19 outbreak, when the whole tutoring industry had to suspend face-to-face classes due to social distancing orders and was forced to switch to online tutoring (China Association for Non-Government Education, 2020). In this situation, the larger tutoring corporations with financial stability and quality online platforms could better survive the health and economic crises.

DISCUSSION AND CONCLUSION

This paper has provided an overview of the forms and trends of shadow education in China. It has demonstrated how the industry evolved from individual teachers' after-class instructions to a multi-billion education market, with various factors contributing to these changes.

An important context for the development of the private tutoring industry in China is the heavy emphasis of education in society, and the associated examination culture. In this social and cultural context, families are willing to make private investments in their children's education, and their engagement in private tutoring is an ongoing drive for the sector to emerge, thrive and evolve further. Much research has associated the participation in private tutoring with



national examination preparations, especially in the Chinese context (Bray, 2009; Zeng, 1999). The Chinese case of the evolving private tutoring provision may provide some insights for understanding this relationship from a sociocultural perspective.

The private tutoring sector is also part of the reason for its own evolution once it becomes an influential industry operating by its own logics. To a large extent, commercialised provisions of private tutoring in China were influenced by the market force which propelled tutorial providers to upgrade their educational services as commodified products and to cultivate consumer demand for private tutoring. The marketised competitions among different tutoring companies allowed some to further capitalise their operations and become dominant actors in the private education market.

The policy context is also crucial for the development of China's private tutoring sector. An underlying factor for the tutoring industry's remarkable expansion has been the neoliberal reforms in China's society and education (Hannum et al., 2008). These reforms contributed to the fast growth in the economic domains, but they also resulted in inequities among the teachers and school systems in mainstream education (You, 2007). The development of shadow education was not isolated from these essential contexts as the industry could profit from both the economic growth and educational inequities.

From the individual-based tutoring classes to the capitalised tutoring corporations, the evolution of China's private tutoring has shifted the sector from a non-formal, almost non-visible education phenomenon to a huge profit-driven business. When tutoring becomes more specialised and standardised, and when industrialised supplies meet Chinese parents' diverse demands in an increasingly competitive society, tutoring becomes an important way through which families purchase the positional goods of quality education for their children's better life opportunities (Liu & Bray, 2020; Wang, 2018).

Many of the challenges from shadow education that China has faced at different stages may be found elsewhere. In different settings, researchers have addressed how underpaid school teachers have provided tutoring to their own students (Bray et al., 2020; Brehm & Silova, 2014), how private tutoring became increasingly industrialised (Mori & Baker, 2010), and how the growing phenomenon might contribute to social inequality (Entrich, 2018). Therefore, a better understanding of the Chinese case may provide a useful reference to research about the issues elsewhere.

At the same time, China's policy makers might benefit from other countries' experiences in managing private tutoring. In recent years, China primarily relied on restrictive policies to regulate the tutoring industry with aims to ease students' heavy study burden and promote educational equality (Liu, 2018). In other countries, a possible policy option besides this restrictive approach is for governments to work with the private sector and provide subsidised forms of tutoring as an alternative to the families' expenditure (e.g. Dawson, 2010; Entrich & Lauterbach, 2019; Lubienski & Lee, 2013; Mori, 2013; Yamato & Zhang, 2017).

In conclusion, private supplementary tutoring has become a major component of Chinese students' educational experiences, and its changing forms require further research effort and policy response. This study has unfolded the pathways of China's private tutoring industry and discussed characteristics of its development at different stages. Future empirical and policy research could benefit from this review and extend the discussion particularly on the recent phenomenon of capitalisation.



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