Editorial

Throwing Light on Shadow Education

This special issue is concerned with the growing global phenomenon of supplementary tutoring, which takes distinct forms in different societies and sometimes even transcends national boundaries. As the title of this issue we chose a metaphor well-known in the field – shadow education – to highlight how private tutoring often shadows or mimics the operation of the formal school system (see the origin of the term in Marimuthu et al., 1991; Stevenson & Baker, 1992; Bray, 1999), we do however recognise that sometimes the content it covers, its aims and purposes, may not coincide with those of formal education. The belief that schools alone – and formal education in general – cannot fulfil all of a student's learning needs, creates the demand for tutoring worldwide. Much of student learning takes place outside of traditional schools, some may be of an academic orientation, while other times it may focus on non-academic activities or offer a hybrid model.

We recognise that the reasons behind this growing phenomenon are not merely educational. It depends, to a significant degree, on the socio-cultural, political and economic context in which it operates; on the identities of the providers and consumers of the service; on educational structures, opportunities and barriers existing within a given context; on the ambitions, aspirations, social and economic capital of the parents; on the educational and cultural values embodied in different societies; on the readiness and willingness of students to participate in such educational opportunities; on the various academic and social pressures that students experience throughout the process, among other things.

In addressing these important aspects of the topic, this special issue is a renewed response to the call to turn our attention towards educational markets broadly speaking and private tutoring, more narrowly. UNESCO's upcoming *Global Education Monitoring Report* (GEM) 2021 on non-state actors in education also recognises the increased role that private providers play in the public education system. The growing interest in private tutoring among scholars around the world indicates that this is an important area of inquiry. At the same time there is an ever-increasing body of literature on the privatization of education and the conceptualization of public and private spaces of learning, often with blurred frontiers. Bibliographic

6   research demonstrates that scholars have generated significant research literature not only in Asia, which has traditionally been a major area for tutoring, but also in Europe (Bray, 2020). This positive tendency has led scholars to develop comprehensive thematic literature in the form of special issues in scholarly journals, such as the *Journal of Education Research Online* (Guill & Spinath, 2014), the *Asia Pacific Journal of Education* (Manzon & Areepattamannil, 2014), the *East China Normal University Review of Education* (Zhang & Bray, 2019), or the *European Journal of Education* (Győri, 2020).

While these special issues have been valuable in the analysis of the forms, practices and meanings of shadow education, they have focused on particular countries and jurisdictions, methodologies and approaches. There remains a need to find new ways of conceptualizing what shadow education is and is not, going beyond the metaphor, filling in the empty places in the world geography and expanding and clarifying the boundaries of meaning. New, robust studies in the field provide opportunities to address old questions and to raise new ones. New approaches and conceptualizations are especially important in the light of the changing educational situation following the COVID-19 pandemic, which has altered the context of education globally, including private tutoring. This special issue builds on the growing academic interest in shadow education, and benefits from many previous contributions by scholars on the subject. We hope the four studies that we have included in this special issue will open up meaningful scholarly conversations and advance the field.

Special issue highlights

To begin with, all four of the articles, authored by both experienced as well as emerging scholars, draw attention to the continued significance and importance of shadow education in the lives of students, teachers and parents. These studies recognize that the demand for shadow education has only been increasing and that there is a need to understand the underlying forces, reasons and motivations.

By situating the analysis of tutoring (known as *Nachhilfe*) in a German context, Entrich and Lauterbach engage in a discussion of the relationship between tutoring and students' socio-economic status (SES), something which has been considered responsible for exacerbating social inequalities. This paper challenges the prominent assumption that shadow education serves economically advantaged families as an instrument of social exclusivity, instead positing that tutoring provides a compensatory mechanism to improve low or average academic performance. The authors found differentiated patterns of use according to gender and social origin, namely boys from non-academic, but high-income families are more likely to use shadow education, whereas girls seem unaffected by social origin. This paper shows that group-differentiated in-depth analyses of quantitative data may unveil hidden

patterns that are not obvious at a first glance, because the predictors may (inter) act differently for different groups.

While many previous papers in the field of shadow education often tended to stress the problematic aspects of the shadow education phenomenon, Jansen, Elffers and Volman highlight the ways in which it helps Dutch students' learning and strengthens their sense of well-being; the authors argue that tutoring, existing between the school and home, stimulates students' attention-spans and learning productivity, and thus maintains a symbolic meaning for students as a "third place" (Oldenburg, 1999). The conceptualization of shadow education as a third place in the lives of students provides a fresh perspective and evidence of positive experiences, because it contrasts with so much of the previous work that portrayed shadow education as exam-focused and stress-related.

Teaching and learning English – today's lingua franca – as a foreign language, is an important topic that receives considerable attention from scholars worldwide, including those focusing on the specifics of private tutoring of the English language. By retrospectively studying the biographical experience of Czech learners of English, covering the participants' lives from early childhood to their entry into tertiary education institutions, Černá has demonstrated the importance of the private tutoring phenomenon throughout the course of a person's life, showing that the roles, functions and nature of private tutoring change as the learner's life situation changes. Whilst many studies in the field of shadow education focus on the characteristics of the phenomenon at one specific time point, Černá's paper is unique in the sense that it takes into account a long-term perspective on learning English and accessing private tutoring.

Khaydarov has provided nuanced and contextualised insights into the way shadow education has become an integral part of the lives of students and teachers at academic lyceums in Samarkand, and demonstrates how private tutoring is embedded within the situated context of Uzbekistan. The author finds contrasting evidence: on the one hand, tutoring serves as a catalyst for teachers' professional development, on the other hand, it also drains energy from these same teachers, who sometimes prioritise tutoring over lyceum teaching due to its lucrative nature. This is an important finding, demonstrating the clash between teachers' professional values and market values. Crucially, the paper also touches the as-of-yet uncharted phenomenon of "shadow education inside schools", i.e. the institutionalized and paid tutoring in academic subjects which is provided officially by the school (schoolteachers) within the school premises. This is a good example of the "hidden privatization in education" (Ball & Youdell, 2007) that has been documented in other parts of the world (Bray, Kobakhidze, Zhang, & Liu, 2018).

After outlining the highlights of these papers in our special issue, in the following paragraphs we would like to position them within the wider context of shadow education as a field of study with regards to their geographic coverage, methodology and central concepts.

Geographic coverage

In terms of geographic groupings, three studies in this special issue represent the European region (Germany, Netherlands and the Czech Republic) and one study represents Central Asia (Uzbekistan). If we take a historical perspective, the Czech Republic and Uzbekistan may be grouped under post-Soviet or post-Socialist countries. While the Czech Republic, formally known as Czechoslovakia, was a satellite state of the Soviet Union, Uzbekistan constituted an integral part of USSR as the Uzbek Soviet Socialist Republic until the collapse of the Soviet Union in 1991. Variability in the socio-economic, cultural and political contexts influenced the phenomenon of shadow education with regard to its forms, aims, purposes and driving forces. As is evident from the articles in this special issue, private tutoring took a very distinct form in each country. We are delighted to bring to you new research evidence from countries in which shadow education is not yet well documented, i.e. the Netherlands and Uzbekistan, thus reducing the number of "uncharted territories" on the global map of shadow education research.

Methodological considerations

Researching shadow education is not easy given its sensitive nature, and the related challenges are evident from the articles in this special issue.

Investigating existing datasets has many advantages, but at the same time many limitations, because the phenomenon of shadow education is not always the main focus of the research studies these datasets come from, and they may therefore lack information on important aspects of shadow education. In this special issue, two of the four papers employed secondary data analysis.

Entrich and Lauterbach located and analysed a rich quantitative dataset from a longitudinal German study that linked together information from parents and their children. This allowed them to get a more complex picture of the issue under investigation, while at the same time being able to distinguish between paid and unpaid tutoring, something other quantitative datasets (such as PISA or TIMSS) rarely allow. The authors did, however, recognise minor limitations originating in the temporal structure between dependent and independent variables.

While secondary analyses of quantitative data are becoming relatively common in the shadow education literature, re-analysing qualitative data is still something of an exception, in part also due to the "intimate" nature of the data and related ethical considerations (Ruggiano & Perry, 2019). In this context, Černá's study is novel in its approach, utilising qualitative data that were not collected primarily with the intention of investigating the shadow education phenomenon, but instead focused on the broader topic of learning English. Knowing the context and background of the primary study and being one of its data collectors helped Černá overcome some of the limitations of secondary qualitative data analysis. Readers will also learn how

the implementation of strategies such as reinforcement feedback, attention-focusing devices and various probes helped her collect narratives from participants.

Khaydarov noticed that among respondents, some teachers and school principals were unwilling to provide honest answers and avoided the questions. He explained this by providing the historical and socio-cultural reasons behind such behaviours and also by elaborating on how issues related to teacher salaries, education quality and private tutoring can be politically sensitive in Uzbekistan. At the same time, the study points to the value of inside-outside legitimation (Onwuegbuzie & Johnson, 2006), showing the importance of not being "caught" in the "insider" perspective, while stressing the advantage of being confronted by an "outsider" during every phase of the research.

The importance of a specific physical place was also stressed by Jansen, Elfers, and Volman – not only in relation to tutoring – this was also projected in their methodological approach. In order to strengthen a feeling of safety in their informants, they always chose a "neutral ground" for the qualitative interviews, never interviewing people in their own home or school. Nevertheless, they reported problems with very short answers from participating students and so developed interactive probing techniques to create prompts to help the students speak up.

As can be seen from the examples above, the papers in this issue, although not primarily concerned with the methodological aspects of shadow education research, also contribute to the wider methodological literature and may help beginning as well as experienced scholars in designing and conducting their investigations of shadow education.

Definitions and foci

There are important questions to be addressed and much ground yet to cover, however one of the central concerns still lies with the question of definition. The diversity of educational experiences under the broad umbrella of shadow education or tutoring creates challenges when classifying and categorising its multiple forms. What is and what is not shadow education? While some authors understand it merely as tutoring in academic school subjects in addition to regular school instruction for a fee, others may also include non-academic subjects, fee-free tutoring or activities other than tutoring, such as learning from pre-scripted online tutorials without the assistance of a tutor or learning using Artificial Intelligence (Kobakhidze & Suter, 2020).

Papers in this special issue explore the "traditional" shadow education forms and types. All four papers focus on tutoring provided "live" by a tutor either to individual students, or in small or larger groups. To distinguish these two cases, Dutch language even uses a special terminology – *bijles* for one-on-one tutoring and *huiswerkbegeleiding* for group sessions, which also offer homework support for students. Černá focused almost explicitly on "classic" private tutoring lessons in English, but also

10 mentioned other ways her informants learned English (e.g., finding a pen friend to practice English with), some of which could fit into "extended" definition of shadow education. Something that is particularly challenging to define and conceptualize may be shadow education provided by "unusual" subjects. As already mentioned, Khaydarov found that some paid tutoring lessons were provided officially by the lyceum which was his research site. However, as the lyceum was a public school, it was unclear how appropriate it would be to call these lessons "private tutoring"? All four papers focus (explicitly or implicitly) on tutoring in academic school subjects, leaving other extracurricular activities (such as hobbies or sports) aside. And finally, all four studies deal primarily with paid tutoring, although some (e.g., Entrich and Lauterbach) make references to unpaid tutoring as well.

Research sheds light, much still in the dark

While the research on shadow education was previously slow to evolve, we are now pleased to see more sustained attention and a breadth of new works. The articles in this special issue take the readers through a wide range of educational practices and contexts which illuminate, or shed new light on shadow education, helping to fill some of the gaps in our knowledge, understanding and geographic coverage of shadow education research. Many of the findings in this issue's papers also have direct implications for various stakeholders, including policymakers,[1] and we hope this will be brought to their attention.

The special issue also includes two informative thematic book reviews by Novotná and Bhorkar. The former analysed a monograph (Kim & Jung, 2019) that takes a global approach and discusses the intersection of shadow education and curricula, the latter reviewed a book that explored the policy implications of private tutoring in Myanmar (Bray, Kobakhidze, & Kwo, 2020).

In the future, it would be interesting to explore how different types of shadow education (Manzon & Areepattamannil, 2014) enable or hinder students from navigating their future educational pathways and aspirations by following longitudinal, ethnographic designs and other forms of long-term studies.

Much more research is needed to get a clearer picture of the ways shadow education can cohabit alongside public schooling without compromising its reputation, or creating extra pressure on teachers, students and families. We need more insight into the micro-social dynamics, meso institutional structures and macro global shifts and patterns that shape students' experiences of shadow education. In particular, with the current uncertainties of the global economy due to the COVID-19 pandemic, there will perhaps be a need for a class-based analysis of shadow education to reveal any inherent inequalities. Attention must also be given to emerging new forms of

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[1] For example, Khaydarov's baseline study, the first of its kind in Uzbekistan, unveiled issues that are closely related to malfunctions in the mainstream education system and are of high relevance to policymakers.

tutoring such as "education pods", "Zutors" (i.e. Zoom tutors) and "microschools", which have been pushed by parents' initiatives worldwide as a result of the pandemic. Additionally, the field could benefit from studies focusing on the technological advances the tutoring industry has been employing, such as AI-enabled platforms, virtual and augmented reality technologies, gamification and adaptive learning.

As is obvious from the previous paragraphs, this issue of *Orbis scholae* managed to cast light on only a section of the field of shadow education. We sincerely hope this special issue will inspire a wider academic discussion and turn scholarly attention towards further investigation of the subjects broached by the studies presented herein.

Pleasant reading!

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Guest editors

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