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Cross-Border Shadow Education: Private Supplementary Tutoring in the Global Education Industry

La Transfronteriza Educación en la sombra: Tutoría suplementaria privada en la industria de la educación global

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Abstract

This paper focuses on the so-called shadow education provision of private supplementary tutoring by companies operating internationally. Some have a history of decades, while others are younger and emerged to take advantage of technological developments. Contributing to analysis of the Global Education Industry, the paper notes variations in the penetration and manifestation across world regions. In this process, it draws on theories of isomorphism, while noting divergence as well as convergence in institutional models. The analysis includes remarks on regulatory regimes, many of which permit and even facilitate such international companies, but some of which – most obviously in China – restrict the operation of such enterprises. Thus, conceptually the paper analyses patterns with understanding of the forces in operation. Some of these forces are economic (pricing, marketing, etc.), but others are political (shaped particularly by government regulations), and social (shaped by different socio-economic groups within the countries in question).

Keywords: Global Education Industry; internationalisation; private tutoring; shadow education; technology

Resumen

El presente trabajo se centra en la denominada educación en la sombra de tutorías complementarias privadas por parte de empresas que operan a nivel internacional. Algunas de ellas tienen una trayectoria de décadas, mientras que otras son más jóvenes y surgieron para aprovechar los avances tecnológicos. Contribuyendo al análisis de la Industria Global de la Educación, el artículo señala las variaciones en la implantación y las manifestaciones que se han producido en todas las regiones del mundo. En este proceso, el trabajo se basa en las teorías del isomorfismo, al tiempo que analiza la divergencia y la convergencia en los modelos institucionales. El análisis incluye observaciones sobre la regulación de los sistemas, muchos de los cuales permiten e incluso facilitan tales empresas internacionales, pero que en algunos – de manera más obvia en China - restringen el funcionamiento de tales empresas. Por lo tanto, conceptualmente el documento trata de comprender los patrones que subyacen en el impulso de estas fuerzas. Algunas de estas fuerzas son económicas (fijación de precios, comercialización, etc.), pero otras son políticas (determinadas en particular por las reglamentaciones gubernamentales) y sociales (determinadas por diferentes grupos socioeconómicos dentro de los países en cuestión).

Palabras clave: Industria Educativa Global; internacionalización; tutorías privadas; educación a la sombra; tecnología.

1.Introduction

The starting point for this paper is the concept of the Global Education Industry (GEI), defined by Verger *et al*. (2016, p.4) in the *World Yearbook of Education* as "an increasingly globalized economic sector in which a broad range of educational services and goods, often on a for-profit basis, are produced, exchanged and consumed". Verger *et al*. added that the GEI "is constituted by its own set of processes, systems of rules, and social forces, which interact in the production, offer and demand of educational services and goods".

Diverse components and actors may be classified as being part of the GEI. At the centre, Verger *et al*. (2016, p.12) suggested, are 'edu-businesses' that produce educational goods and services. They include:

- chains of private schools operated by enterprises such as GEMS and Bridge International Academies;
- companies such as Pearson that provide a broad range of publishing and educational services, and IT/software companies such as Microsoft, Intel and Hewlett Packard;
- consultancy firms ranging from large transnational corporations such as McKinsey to individual consultants with more specialised foci;
- philanthropic bodies such as the Hewlett Foundation that are formally autonomous but usually implicitly aligned with the business strategies of their founders and funders.

In addition, Verger *et al*. mentioned (2016, p.12), are multiple institutional and individual policy entrepreneurs who expand the GEI through advocacy in professional and personal networks.

The *World Yearbook of Education* for which the chapter by Verger *et al*. was the Introduction addressed many components of the GEI, including not only private institutions operating alongside public ones but also textbooks, computers, software, achievement tests and other items marketed to both private and public institutions. Private supplementary tutoring, which is the subject of the present paper, was mentioned in this Introduction (p.6), but only in passing and without follow-up in the rest of the book. The concept has also been absent from much related literature on the GEI (e.g. Parreira do Amaral *et al*., 2019). The present paper reduces this gap.

Private supplementary tutoring, it must be recognised at the outset, is complex and multifaceted. It may be provided one-to-one, in small groups and/or in large lectures, both in the same space and over the internet. Such tutoring is widely called shadow education because to a large extent it mimics regular schooling: as the size and content of schooling change, so do the size and content of the shadow (Bray, 1999; Wiseman, 2021; Zwier *et al*., 2021). The metaphor is not perfect, because the mimicry is imprecise: some components of private tutoring are delivered ahead of coverage in school, and other components go beyond the school curriculum rather than being tightly constrained by mimicry (Bray *et al*., 2015; Gordon Győri, 2020). Nevertheless the metaphor is useful as a broad descriptor, and it conveys the meaning of a supplement rather than a substitute for schooling.

The overall goal of this paper is to highlight the evolving shapes and forms of shadow education within the GEI. It begins by expanding on the remarks about definitions and parameters, stressing the specific focus of the present discussion on cross-border provision by commercial enterprises. The paper then outlines some historical patterns from the second half of the 20th century before turning to more contemporary characteristics to show different models in different eras. Among the analytical questions is the extent to which cross-border private tutoring mimics schooling and is isomorphic. The paper also considers matters of private-sector advocacy, government policy, and regulation. The final section pulls threads together in conclusion.

2. Definitions and Parameters

In this paper, the terms private tutoring and shadow education are used interchangeably. Following dominant definitions in the literature (see e.g. Luo & Chan, 2022; Zhang & Bray, 2020), the focus is on tutoring that is:

- *academic* in nature, i.e. for examinable subjects such as mathematics, languages and sciences rather than domains such as music and religion that are learned primarily for personal development;
- *supplementary* to schooling, and delivered outside school hours; and
- *fee-charging*, thus excluding free-of-charge provision by family members, philanthropic bodies, etc..

Tutoring exists at all educational levels from pre-primary to university, but again in line with the broader literature the principal focus here is on tutoring for primary and secondary students.

Around the world, three main categories of tutoring providers may be identified. First are serving teachers in public and private schools who offer supplementary tutoring beyond school hours in order to secure additional incomes. Second are university students and other informal providers such as housewives/househusbands and retirees; and third are formally-constituted companies. This third category is the concern of the present paper, in line with the focus identified by Verger *et al.* (2016, p.3) on formal organisations. Most countries have multitudes of small tutoring companies that serve their immediate localities, but the analysis of the present paper is of larger enterprises operating across national borders.

In terms of global mapping, many observers have historically associated shadow education with Japan which is renowned for its *jukus*, South Korea which is equally renowned for its counterpart *hagwons*, and with other parts of East Asia (Zhang & Yamato, 2018). However, shadow education has also long been visible in countries as diverse as Egypt (Hartmann, 2013), Greece (Kassotakis & Verdis, 2013), and Mauritius (Foondun, 1992). Moreover, since the turn of the century the phenomenon has expanded almost everywhere – including the Nordic countries which have long been widely respected for excellent education systems that do not need supplementation (Christensen & Zhang, 2021).

Y*et al*though shadow education like schooling is now a global phenomenon, this is not quite the same as a Global Education Industry as defined by Verger *et al.*. First, informal providers of tutoring including regular teachers who supplement their incomes would not consider themselves to be part of an industry; and second, most providers have local or at most sub-national and national provision and do not operate internationally. Thus the providers who can be considered part of the GEI are a relatively small but growing number of international operators based in a wide range of countries. Most of them serve nationals of the countries in which they operate, but some serve expatriates – illustrated by the various Japanese *jukus* operating in Singapore (Toh, 2022), and by a UK-based company calling itself Tutors International that reported in 2022 an increase in demand from Russians moving abroad in the context of anti-Putin sentiments linked to the Ukraine crisis (Hunter, 2022; Tutors International, 2022).

The overall weight of the industry is illustrated by a market report indicating huge size in 2020 and projecting significant growth (GlobalNewswire, 2021). The report indicated that "the global market for Private Tutoring estimated at US$123.8 Billion in the year 2020, is projected to reach a revised size of US$201.8 Billion by 2026". The report named 100 specific companies, described as "select competitors".

3. Different Eras, Different Models

The most obvious forerunner in the shadow education component of the GEI is Kumon, headquartered in Japan. The origins of this company lay in domestic support by Toru Kumon, a mathematics teacher, for his son. Finding that this support was effective, in 1958 Kumon established a formal enterprise which expanded into a significant national company (Ukai, 1994; Tsai, 2018). Kumon's first overseas centre was opened in the USA in 1974, initially to serve a Japanese family that had moved and desired ongoing support. Franchised centres were then opened in Taiwan, Brazil and Germany, at first serving Japanese expatriate families and later also serving local ones. Now Kumon franchises are located in 50 countries and five continents (Kumon, 2022). The original curriculum focused only on mathematics, but English was added in the 1990s, and later Chinese, French, German, Portuguese and Thai according to potential in particular locations.

Other companies have employed similar models on a smaller scale. For example the Korean company Noonnoppi, also known as e.nopi and since 2012 as Eye Level Learning (Business Wire, 2012), was established in 1976 and now operates in over 20 countries. Since 1991 like Kumon it has operated on a franchise model, with particular emphasis on mathematics and English. From Australia, Kip McGrath is a company in the same category, founded in 1976 as a family operation (Kip McGrath, 2022). This company also focuses on numeracy and literacy, and currently operates in 20 countries. Sylvan Learning is a counterpart, founded in the USA in 1979 and now working in eight countries (Sylvan Learning, 2022); and Oxford Learning was founded in the UK and now operates in seven countries (Oxford Learning, 2022).

More recent has been establishment of internet-based companies. TutorVista was founded in 2005 in India to capitalise on relatively low salaries in that country to provide profitable online service to clients in the USA, UK and elsewhere. The company was progressively purchased by Pearson with a 17% stake in 2009 raised to 76% in 2011 and 100% in 2013 (Vignesh, 2017). Subsequently Byju's, an India-headquartered learning-app company that had been established in 2011, purchased the company from Pearson. By that time TutorVista was employing approximately 2,000 tutors from India and elsewhere to serve clients around the world. The main subjects were mathematics, English and the sciences. Byju's had eight million users of its learning app in Grades 4-12. It was already present not only in India but also the Middle East, and was seeking expansion in North America, Europe and Southern Africa (Vignesh, 2017).

While TutorVista capitalises not only on relatively low salaries in India but also on the colonial legacy of the English language, a counterpart in the Arabic-speaking world is Noon Academy (Paracha, 2020; Rahal, 2017). This company was established in Saudi Arabia in 2013, particularly employing Egyptian tutors with relatively low salaries and operating at a distance. Within four years the company was serving over a million secondary students; and after a further five years it claimed to be “loved by 12+ million students and 100k teachers across 8 countries” (Noon Academy, 2022). Business had been much boosted by COVID-19, which had closed schools across the world for various durations and thus shifted learners to online alternatives.

VIPKids, founded in 2013, has been a counterpart to these models in China. Until the advent of government regulations to dampen the industry (China, 2021), VIPKids exploited the attractiveness of native speakers of English in Canada and the USA to tutor children in China (AP News, 2019). The company also operated in the reverse direction, employing tutors in China to help overseas-Chinese families around the world to maintain and develop their Chinese-language skills.

Other companies employ the internet for matching services rather than direct tutoring. For example First Tutors is a company established in the UK in 2005 and charging a “finder’s fee” for tutors and tutees using its service. Alongside the UK itself, by 2022 the company operated in Australia, Canada, Ireland, New Zealand, and South Africa (First Tutors, 2022). In the Arabic-speaking world, a parallel company called Synkers was established in Lebanon in 2017 and within three years, having harnessed venture capital from the marketplace, claimed to have served over 60,000 students through 1,000 vetted tutors who had given 90,000 tutoring sessions (Fernandez, 2020).

While in other parts of the world the internet may not reach so deeply and reliably, this shortcoming has not prevented counterpart entrepreneurs from harnessing technology in ways that would have been inconceivable in earlier decades. In Kenya, for example, a company called Eneza Education was established in 2011 to provide tutoring through text messages on mobile telephones (Eneza Education, 2022). In due course it directly expanded to Ghana and Côte d’Ivoire, and developed a partnership in Rwanda. Collaboration with telephone companies permitted deduction of fees from mobile airtime without separate procedures. Through its mode of operation and pricing, the company could target relatively low income groups.

Nevertheless, technology does not dominate all settings. The principal tutoring company in Denmark is MentorDanmark, established in 2013 (Kany, 2021). It mainly recruits part-time university students – and in some cases even senior-secondary students – to coach tutees in the homes of the tutees. Shortly after establishment in Denmark, the company launched the same concept in Norway in an affiliated operation. Explorations for counterpart work in Sweden and Germany did not eventuate, but the company’s Director nevertheless stated that the ambition remained unchanged: “we want to go out into the world and help as many children and young people as possible” (Kany, 2021, p.637). Concerning technology, the company like so many others found itself forced online by the COVID-19 crisis. However, the Director indicated (pp.638-639), the crisis created “online fatigue”. More than ever, he found, “students and parents demand the intimacy of face-to-face tutoring”. Thus, he added: “Even if online tutoring is set to become a significant aspect of private tutoring in the future, I … believe that MentorDanmark’s focus on offline, face-to-face tutoring has stood the test of the COVID-19 crisis.”

On a different tack, GEI components include companies that advise on investments rather than themselves engaging in direct provision. One such advisory company is Caerus Capital, headquartered in Canada. In 2017 the company produced a report entitled *The Business of Education in Africa* (Caerus Capital, 2017) which included recommendations for private supplementary tutoring as well as other GEI components, particularly in Ethiopia, Kenya, Liberia, Nigeria, Senegal and South Africa. In similar vein a company called 360 Research Reports, with offices in the US, UK and India, between July 2016 and January 2022 produced as many as 83 reports explicitly focusing on private tutoring development across the world. Most reports were updates on their predecessors, with such titles as (in January 2022) *Global Private Tutoring Market Size, Status and Forecast 2022-2028* (360 Research Reports, 2022). The geographic scope was indicated as "North America, Europe, China, Japan, Southeast Asia, India and Latin America, etc.". These reports on private tutoring sat alongside ones on healthcare, aerospace, agriculture, biotechnology, and electronics.

4. Divergences and Convergences in Educational Provision

Sociologists have long been interested in the shapes and roles of schools, and in recent years have also touched on private tutoring. During the 1990s, the lens of New Institutionalism developed to challenge earlier theories of isomorphism and coupling between schools within education systems (Meyer & Rowan, 2006, p.1). For the present paper, a question concerns the shape of supplementary tutoring compared with that of schooling. The shadow metaphor implies that whatever schooling does is mimicked by the tutorial institutions, but closer scrutiny shows that that is not completely the case.

Within the edited book to which the contribution by Meyer and Rowan (2006) was the Introduction, Davies *et al*. (2006) focused on patterns of educational provision in Canada including through tutoring franchises and small independent companies. Asking whether these bodies emulated standard public school models in an isomorphic way, Davies *et al*. responded (p.115) that the franchises adopted hybrid forms while the independent tutoring businesses diverged into many niches.

Using these lenses to consider the types of provision noted above, Kumon provides an instructive starting point. The Kumon approach to mathematics is distinctive, valued by some educators but spurned by others for its mechanical approach based on repetitive exercises more than comprehension and insight. Certainly it differs from approaches in most school systems, even in Japan. Yet unexpectedly to the Kumon leadership, the company's vigorous expansion in the USA during the 1980s was strongly underpinned by partnerships with public schools. As explained by Ukai (1994, p.108), the vice-principal of an elementary-school was impressed by a news report on the Kumon method. Despite initial objections by government officers that Kumon was not for school use, she was permitted to try Kumon as an in-school supplemental curriculum, and achieved dramatically-improved test scores. Publicity then led to major expansion of public-private partnerships with Kumon in the USA. It also contributed to diversity in the Kumon offerings within the country. The Kumon management, concerned about variations across and within countries, endeavoured to standardise franchise operations for brand consistency and smooth coordination. In the USA, as recounted by Tsai (2018, p.13), this move damaged relationships with the franchisees. A new management team for the USA appointed by the parent company in 2013 endeavoured to repair relationships, stating that the company's franchise system differed from those of conventional franchise businesses and therefore required only minimum standardisation. This set of experiences thus suggests some isomorphism but some continued diversity.

Most of the other tutorial offerings mentioned above are organisationally completely separate from the schools but do mimic insofar as they are guided by the demands of the school systems and in particular by public examinations. Yet the dominant focus in all operations is on mathematics followed in most cases by languages and in a few cases by sciences. History, geography and social studies are absent from their offerings because these require more tailoring to specific national contexts in which the cross-national providers do not have comparative advantages. In this respect, the GEI models accentuate imbalances in what at least some educators might consider a well-rounded education.

In a different domain, Toh's (2022) analysis of Japanese *jukus* operating in Singapore remarked (p.155) on their role as "surrogate cultural agencies", to help ensure that expatriate children properly "adapt to Japanese ways" if and when they proceed to Japan for further studies. As such, the isomorphism is with the geographically distant educational structures and cultures of Japan rather than with those of Singapore. Elaborating, he observed (p.155) that as surrogate cultural agencies in this sense, *jukus* "duly fulfill their (honorary) role as de facto cogs in the machinery of social acculturation and subjectivization, which in normal circumstances goes beyond their role as the money-making entities of the Japanese education industry". He endorsed the observation by Roesgaard (2006, p.13) that *juku* businesses have been "very effective at diversifying and seeking [out] new markets to cover and new services to offer", in this case training youths in manners acceptable to the Japanese establishment. Toh did, however, note some nuances with variations between 'Exported-to-Singapore' products and 'Made-in-Singapore' ones.

Divergences and convergences are also of course shaped by government perspectives, particularly as they relate to regulation. In general, shadow education is under-regulated compared with schooling, but some governments are catching up with the phenomenon (Bray & Kwo, 2014; Zhang, 2021). Domestic providers may be difficult to regulate, and cross-border models are even more challenging – especially when instruction is delivered by the internet directly to students' homes. As such, governments may have little control concerning either the overt or the hidden curricula, qualifications of tutors, hours of operation, study burden, etc.. Writing about patterns in Europe, Sørensen (2021) remarked on the irony that European Union Member States "are formally sovereign in their education policies, while cross-border privatisation is allowed to undermine education as a public good".

The issue of study burden has been strikingly on the Chinese agenda in recent years. In 2021, the government issued a policy on 'double burden reduction', feeling that school children and youth were suffering excessively from both homework and private tutoring (China, 2021). By 2019, over 20 large tutorial companies had been listed on stock exchanges in New York, Hong Kong and Shanghai (Feng, 2021, p.94). The Chinese authorities disapproved of this situation, and included in the 2021 policy the statement (paragraph 14) that:

> "Capitalization is strictly prohibited. Listed companies shall not purchase the assets of academic tutoring institutions through stock market financing.... Foreign capital shall not hold or participate in academic tutoring institutions through mergers and acquisitions, entrusted operations, franchise chains, and the use of variable interest entities".

Also driving the policy were feelings that education – both state and non-state – was a core component of national affairs and thus national sovereignty, and that online education companies were securing excessive personal data from families in an environment of inadequate data protection. As a result of the policy, most tutorial companies that had been listed on stock markets proceeded to delisting, and the remainder oriented their activities away from supplementary tutoring in academic subjects for students in the period of compulsory education. The Chinese action was a clear reaction to the expanding GEI, even though capitalisation in most other sectors was tolerated, and was possible in a country with strong centralised government. China was distinctive in the number of large companies listed on foreign stock markets. It was not so distinctive in the matter of data collection by online companies, but was a country in which the authorities chose to take action. Few governments elsewhere have the organisational capacity combined with the ideological commitment to take such an approach, with the result that international investors have continued to view education elsewhere as a profitable sector.

5. Global Summits to Extend Influence and Legitimacy

The overall neoliberal agenda that has promoted marketisation has gained legitimacy through events co-sponsored by bodies such as the European Commission (EC) and the Organisation for Economic Co-operation and Development (OECD). Thompson and Parreira do Amaral (2019, p.1) opened their co-edited book about *Researching the Global Education Industry* with remarks about the third Global Education Industry Summit hosted in 2017 by the Luxembourg Ministry of Education, Children & Youth in conjunction with the EC and OECD. The aim of the event, Thompson and Parreira do Amaral (2019, pp.1-2) reported, was "to give a selected number of ministers, senior policy makers, and industry leaders opportunities to accelerate change, making industry actors consolidated partners in education".

A parallel event during the same year was a Global Education Summit in Beijing co-sponsored by Tomorrow Advancing Life (TAL – at that time China's largest tutorial company), the China Development Research Foundation, Beijing Normal University, Tencent (a major technology company), and Global Silicon Valley Capital Corporation, under the guidance of China's Ministry of Education. Keynote speeches were delivered not only by the TAL founder and Chief Executive Officer but also by the Chairman of China's second-largest tutorial company, the New Oriental Education and Technology Group. China's Vice Minister of Education is reported to have enjoined the summit participants "to work together, share development experiences and carry out in-depth cooperation, with a view to realizing the beautiful vision for education in various counties and making bigger contribution to creating a community of shared future for mankind" (PR Newswire, 2017).

For the perspective of this paper, even more striking is that the 2019 sequel was co-sponsored by UNESCO as "the specially invited cooperation partner" (PR Newswire, 2019). Yet the UNESCO role gave the feeling more of legitimation and impression-management by the private sector including the tutorial companies than of true convergence of interests. The summit theme 'Education for All' clearly resonated with UNESCO vocabulary – but whereas UNESCO had consistently used this phrase in the context of reduced social inequalities through universal access to education (see e.g. UNESCO, 2005, 2015), the self-interested components of business sector sought a marketplace in which all learners should have access to (and preferably consumption of) their products. As in other events (see e.g. Ridge & Kippels, 2019), UNESCO found itself treading a delicate path in this form of collaboration.

The 2017 and 2019 summits in Beijing strongly emphasised the educational contributions of technology. Thus, the report on the 2017 event gave an overall optimistic perspective with the statement that "global expenditure on education has exceeded 5 trillion US dollars and is expected to grow at 8% every year to reach 8.1 trillion US dollars in 2020" (PR Newswire, 2017). Expenditures on educational technology, the statement added, were "well above the industrial average, growing at 17% every year", and at the summit "many domestic and foreign guests agreed that science and technology are ushering in a better future for education". Continuing this theme in 2019, the TAL Co-founder and President poetically described the internet as having "given wings to quality education to let education cross mountains and rivers" (PR Newswire, 2019). However, the face-to-face operations of Kumon, Sylvan Learning, Kip McGraw, etc. showed that in-person interactions were still fundamental.

6. Conclusions

Verger *et al.* (2016, p.4) wrote that the GEI "is not simply an organic phenomenon in the economic sphere", and that instead it is "shaped and enabled by public policy making". In the Chinese case an irony is that, despite the 2017 and 2019 Summits, in 2021 the private tutoring industry was disabled rather than enabled by public policy. Nevertheless, environments elsewhere are more permissive and even welcoming (Bray & Kwo, 2014; Zhang, 2021). Shadow education is booming across the world, in some settings having been facilitated by COVID-19 which has habituated not only families but also public authorities to the value of supplementary provision alongside schooling (see e.g. Major *et al.*, 2020; Piao & Hwang, 2021; White House, 2022). In many countries shadow education has become a normalised activity for children and youth, and no longer is it widely viewed as an activity to hide either because it implies that recipients are lagging behind their peers or because the recipients are high achievers securing unfair advantages.

Within analysis of the GEI, shadow education has received less attention than other sectors, in part because it is mostly a domestic phenomenon albeit now evident globally. Yet multiple actors work across national boundaries, and their numbers are likely to expand as education systems themselves expand and the forces of globalisation increase competition across national boundaries even for ordinary families. Thus, the cross-national components of the shadow education sector may be expected to grow further, just as the domestic components are growing further. Verger *et al.* (2016, p.4) highlighted the emergence of for-profit organisations and investors "across a range of levels and activities … which have traditionally been within the purview of the state". Shadow education has not traditionally been within this purview, and instead is part of the second category noted by Verger *et al.*, namely "new market niches" of various kinds.

Nevertheless, much variation will remain evident across the world. Cross-national providers generally aim at higher-income families, most of which are in higher-income countries. Their programmes may also have language biases, for example focusing on English-medium provision since the international market is larger. However, niche markets include Japanese expatriate families in Singapore, the USA and elsewhere; and companies such as Kumon have adapted their products to markets in Germany, Indonesia, Thailand, for example. As in domestic markets, moreover, some providers serve clients either with mimicry that offers more of the same in order to consolidate existing learning, while other providers offer differentiation that stretches high achievers to greater learning.

Figure 1 presents an analysis of such patterns in diagrammatic form. It shows national and local provision as considerably larger than the cross-national and global provision (and the proportional difference is much greater than shown in the diagram). As indicated, factors that facilitate cross-national and global tutoring provision include the broad forces of globalisation in which ideas, labour and capital move across borders with increasing ease. This movement has been given a huge boost by technological developments that permit online tutoring and learning; and the fact that increasing numbers of families move abroad for shorter or longer periods creates diasporas desiring various forms of tutoring from their countries of origin.

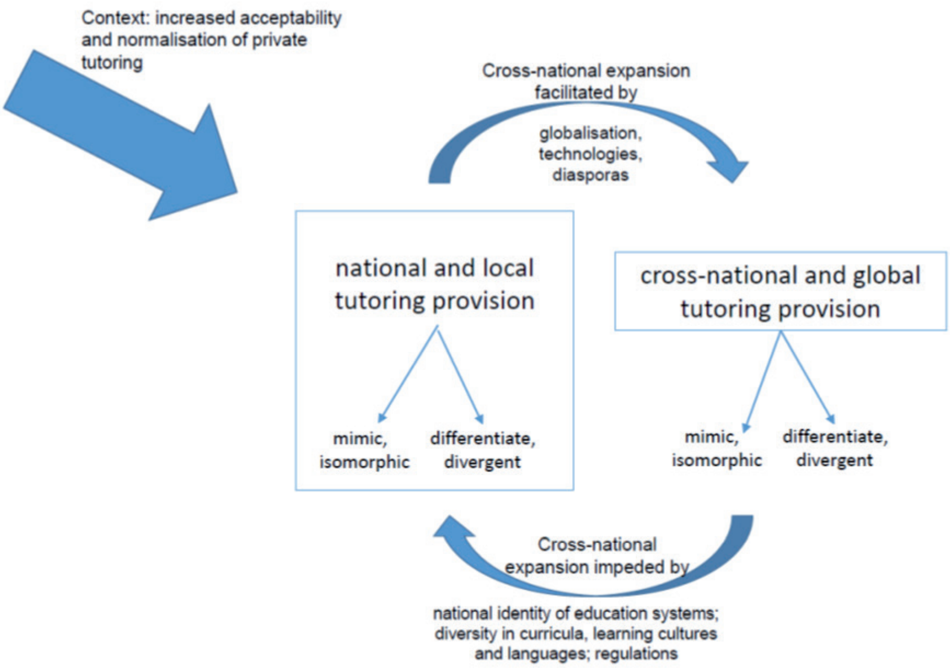

Figure 1. Dynamics in shaping forces for cross-border shadow education

On the other side, however, are various impediments to cross-border provision of tutoring. One of the strongest is the fact that national and local education systems retain their own curricular characteristics even in mathematics and the sciences and even more in such subjects as history and geography. Alongside variations caused by languages of instruction and further variations in cultures of learning. Cross-border providers may be poorly equipped to handle such national and local diversities, and when they fail to handle them their provision accentuates imbalances in what might be considered well-rounded forms of education. The regulatory regimes in different countries also create complexities for cross-national providers. Some governments are *laissez faire* on the matter, but problems in the shadow education sector are coming increasingly to the attention of authorities around the world, generating diverse responses in matters of detail that can sometimes change at short notice.

Further variations are evident in the sizes and modes of operation of individual enterprises. The examples cited in this paper include Kumon's huge machinery using its own curriculum, technology companies providing tutoring or simply matching services online, and the much more personalised services provided by MentorDanmark and its affiliates. As such, the diversity of models for cross-national provision is comparable to those within countries (Zhang & Bray, 2020). Other variations arising from differing contexts and therefore marketplaces are illustrated by Kenya's text messages on mobile phones in contrast to full lessons available to learners in the USA supported by online enterprises. As Ventura and Jang (2010, p.60) evocatively pointed out, the internet has brought sharp changes in scale as well as reach:

> "In order for one to become a player, it is not necessary to be big or to have a big infrastructure. Before, we could only see from our window the landscape that our eyes could reach. Nowadays, from our electronic window we can grasp the whole world. Therefore, the market is truly global since our work can be done from anywhere. The market law never had such a vast portfolio of opportunities as nowadays".

A corollary of these variations lies in pricing to fit different income groups in different markets. Other variations arise from political forces, for example with the Chinese pattern making a striking contrast with the more enabling environments of most other parts of the world. Thus, despite some overall trends the GEI still has instructive nuances that deserve further exploration in changing environments.

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