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| RGC Reference HKU701-HSS-12 |
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**The Research Grants Council of Hong Kong
Prestigious Fellowship Scheme under the Humanities and Social Sciences Panel
Completion Report**
(for completed projects only)

Part A: Project and Award Holder

1. **Project Title:** 'Social Inequalities amidst the Global Agenda of Education for All (EFA): Local, Regional and Global Implications of Private Supplementary Tutoring'
2. **Award Holder and Academic Department/Unit Involved**

| Name/Post | Unit/Department/Institution | Contact Information |
|---------------------|--|--|
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5.2 Revised workplan

Date of approval from the RGC: 18 Oct 2012

Reasons for the change: Second block of six months postponed to 2014

Some activities in second half of 2013 still conducted, but not on the Fellowship. Others added. See next section for details.

5.3 Realisation of the workplan

Context and Objectives

The Fellowship was granted to permit the applicant to extend his impact within the global community on the agenda of Education for All (EFA). This agenda, which is led by UNESCO, originated in a 1990 World Conference in Thailand. Reduction of both global and local inequalities was a major principle underlying the movement. The most prominent goal set by delegates was universal access to primary education by 2000. The goal was not achieved, and a 2000 conference in Senegal reformulated the agenda into six objectives with a target of 2015. This dovetailed with the United Nations' Millennium Development Goals (MDGs).

Part of the issue of social inequalities concerns explicit and hidden fees. Some of the hidden fees are for private supplementary tutoring, which has become very common as a global phenomenon. Children whose families can afford more and better tutoring get ahead, while children whose families can afford only low quality or no tutoring lag behind. This tutoring is widely called shadow education, because its content mimics that in regular schooling: as the curriculum changes in the schools, so it changes in the shadow.

The Fellowship holder has strong links with UNESCO. Between 2006 and 2010 he took leave from HKU to work in Paris as Director of UNESCO's International Institute for Educational Planning (IIEP), and in 2012 he was designated the holder of the UNESCO Chair in Comparative Education at HKU. He also has a long track record of work on shadow education. With these in mind, the objectives of the HSSP Fellowship were to:

- extend empirical research on shadow education in Hong Kong, Shanghai and Cambodia,
- develop partnerships with researchers elsewhere, especially in Asia, for further comparative analysis,
- construct conceptual frameworks which will feed into deliberations on a reformulated EFA agenda that has relevance to middle-income and high-income societies as well as to low-income ones, and
- provide policy advice both directly to schools and governments and indirectly through international agencies.

These objectives were achieved with much success. Indicators are as follows:

1. *Extend empirical work*

The Hong Kong work had been funded by a GRF grant awarded in 2011. Because the Fellowship bought out time from teaching, the Fellowship holder had time to focus on analysis and writing up. Section 6.3 indicates products in which a significant part resulted from work during the Fellowship period.

The Shanghai work was slower because of a funding constraint. Nevertheless, groundwork was conducted for a successful HKU Small Project Fund awarded in February 2014; and a GRF grant proposal was submitted in October 2014.

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The Cambodia work also made significant progress. A GRF-funded project commenced in January 2014, and the Fellowship holder was able to travel to Cambodia for training of local counterparts in March 2014. Data collection began immediately after that.

2. Develop partnerships with researchers elsewhere

The Fellowship permitted the holder to undertake extensive international travel. It provided the time for this travel, which in some cases was financed from the Fellowship and in some cases from other sources. This travel is evident in the list of conference presentations (see section 6.3). In addition, the Fellowship holder engaged in consultations with UNESCO (Paris; January and June 2014), the Organisation for Economic Co-operation and Development (Paris; January 2014), Associations of Tutoring Providers in Greece and Cyprus (June 2014), and policy makers in Venezuela (March 2013), Mexico (March 2013), Dubai (January 2014), and Iran (February 2014). In January 2013 he travelled to the Republic of Georgia to contribute to the Privatisation in Education Research Initiative (PERI) sponsored by the Open Society Foundations (Soros).

3. Construct conceptual frameworks to feed into deliberations on a reformulated EFA agenda

One culmination of the Fellowship was participation in the World Education Forum in Incheon, Republic of Korea, in May 2015. This was a great honour, and a historic occasion with representatives of over 160 countries and seven UN agencies convening for a landmark event in the sequence from the 1990 Thailand and 2000 Senegal events. In addition, the fellowship holder co-authored the lead document for the triennial Conference of Commonwealth Education Ministers in The Bahamas (June 2015). The document focused on equitable access to quality education, and included explicit focus on shadow education.

4. Provide policy advice

In January 2013, HKU hosted a training course for 73 planners and managers of education in Indonesia, Thailand and Vietnam. It was run in conjunction with UNESCO's International Institute for Educational Planning (IIEP), and provided an opportunity to disseminate the findings of research and to secure further partnerships for research.

Related events were:

- The Policy Forum hosted by HKU in 8-9 April 2013, entitled 'Regulating the Shadow Education System: Private Tutoring and Government Policies in Asia'. The Policy Forum was organised by the Comparative Education Research Centre (CERC) in conjunction with the UNESCO Asia and Pacific Regional Bureau for Education and the Asian Development Bank (ADB). It brought together 33 researchers, government personnel, practitioners and other stakeholders from 18 jurisdictions.
- A repeat Policy Forum, in Chinese, 6-7 June 2013, organized by CERC with the China Education Training Union and entitled 'Ways out of the Shadows'.

This pair of events led to a publication *Regulating Private Tutoring for Public Good: Policy Options for Supplementary Education in Asia* (Mark Bray & Ora Kwo), co-published by CERC and UNESCO's Regional Office in Bangkok, and launched in Bangkok in March 2014. Translations have now been prepared in Chinese (partnering with the China Education Training Union) and in Korean (partnering with the Association of Hagwon Tutoring Providers). It has been cited in UNESCO's *EFA Global Monitoring Report* and a flagship publication entitled *Rethinking Education: Towards a Global Common Good?*. The latter is the sequel to the historic and widely-quoted 1996 Delors Report.

These achievements, it must be recognized, were not solely attributable to the HSSP Fellowship. But the Fellowship provided time by buying out teaching and administrative duties, and provided finance for some travel. It therefore permitted highly productive synergies.

6.3 Realisation of the dissemination plan

a) Keynote addresses at Conferences during the period:

- 1/2013 *China*: 'UNESCO and the Research Agenda for Shadow Education: Lessons and Implications for Comparative Education'. South China Normal University, Guangzhou.
- 2/2013 *Venezuela*: 'Units of Comparison in Educational Studies'. Ministry of Higher Education, Caracas.
- 3/2013 *Mexico*: 'Comparative Education Research: Approaches and Methods'. Centro de Investigación y Docencia Económicas, Mexico City.
- 3/2013 *Malaysia*: 'Shadow Education: Comparative Perspectives on the Spread and Implications of Private Supplementary Tutoring'. Centre for Research in International and Comparative Education, University of Malaya, Kuala Lumpur.
- 4/2013 *Hong Kong*: 'The Scale, Nature and Implications of Shadow Education: Global, Regional and Local Perspectives'. Policy Forum on 'Regulating the Shadow Education System: Private Tutoring and Government Policies in Asia'. Comparative Education Research Centre, The University of Hong Kong
- 4/2013 *Malta*: 'International Perspectives on Private Tutoring: Implications for Equity and Excellence'. University of Malta.
- 5/2013 *Canada*: 'Shadow Education: Comparative Perspectives on the Global Growth and Local Implications of Out-of-School Supplemental Education'. University of British Columbia, Vancouver.
- 6/2014 *Greece*: 'Symbiosis which Complements, or Parasitism which Weakens? International Perspectives on Relationships between Shadow Education and Schooling'. Conference on *Shadow Education System: Border Management Models of the School with the Structures of Education Market*, University of the Aegean, Rhodes,
- 6/2014 *Philippines*: 'Researching Shadow Education: Challenges and Directions'. Conference on *Researching Shadow Education: Implications to Students' Academic Performance*. University of Santo Tomas, Manila.

b) Other Conferences Attended (with papers presented):

- 2/2013 *Hong Kong*: Annual Conference of the Comparative Education Society of Hong Kong (CESHK), Chinese University of Hong Kong
- 3/2013 *USA*: Annual Conference of the Comparative & International Education Society (CIES), New Orleans
- 2/2014 *Hong Kong*: Annual Conference of the Comparative Education Society of Hong Kong (CESHK)
- 3/2014 *Canada*: Annual Conference of the Comparative & International Education Society (CIES), Toronto
- 4/2014 *China*: Biennial Conference of the Comparative Education Society of Asia (CESA), Hangzhou

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c) Publications

- Bray, Mark; Zhan, Shengli; Lykins, Chad; Wang, Dan & Kwo, Ora (2014): 'Differentiated Demand for Private Supplementary Tutoring: Patterns and Implications in Hong Kong Secondary Education'. *Economics of Education Review*, Vol.38, No.1, pp.24-37.
- Chan, Claudia & Bray, Mark (2014): 'Marketized Private Tutoring as a Supplement to Regular Schooling: Liberal Studies and the Shadow Sector in Hong Kong Secondary Education', *Journal of Curriculum Studies*, Vol.46, No.3, pp.361-388.
- Bray, Mark (2014): 'The Impact of Shadow Education on Student Academic Achievement: Why the Research is Inconclusive and What can be Done about it'. *Asia Pacific Education Review*, Vol.15, No.3, pp.381-389.
- Bray, Mark & Magda Nutsa Kobakhidze (2014): 'Measurement Issues in Research on Shadow Education: Challenges and Pitfalls Encountered in TIMSS and PISA'. *Comparative Education Review*, Vol.58, No.4, pp.590-620.
- Kwo, Ora & Bray, Mark (2014): Understanding the Nexus between Mainstream Schooling and Private Supplementary Tutoring: Patterns and Voices of Hong Kong Secondary Students. *Asia Pacific Journal of Education*, Vol.34, No.4, pp.403-416.
- Bray, Mark & Magda Nutsa Kobakhidze (2014): 'The Global Spread of Shadow Education: Supporting or Undermining Qualities of Education?', in Napier, Diane Brook (ed.), *Qualities of Education in a Globalised World*. Rotterdam: Sense, pp.185-200.
- Bray, Mark & Kwo, Ora (2014): *Regulating Private Tutoring for Public Good: Policy Options for Supplementary Education in Asia*. Hong Kong: Comparative Education Research Centre, The University of Hong Kong, and Bangkok: UNESCO Asia and Pacific Regional Bureau for Education, 93 pp.
- Bray, Mark (2015): 'Symbiosis which Complements, or Parasitism which Weakens? International Perspectives on Relationships between Shadow Education and Schooling', in Kodakos, Anastassios & Kalavasis, Fragiskos (eds.), *Shadow Education System: Border Management Models of the School with the Structures of Education Market*. Athens: Diadrasi (in press).

d) Media reporting

- 'Tutoring Culture in Hong Kong', RTHK interview (Radio 3), 25 March 2013. Co-hosts: Hugh Chiverton and Mike Rowse. Panelists: Mark Bray (HKU), Alastair Sharp (Lingnan University), Kelly Yang (Kelly Yang Project – after-school programme for children in HK). 08.30 to 09.20.
<http://programme.rthk.hk/channel/radio/programme.php?d=2013-03-25&p=514&e=&m=episode>
- 'HK celebrity tutors raking in big bucks'. *Straits Times*, Singapore, 7 April 2013, p.9.
<http://www.stasiareport.com/the-big-story/asia-report/hong-kong/story/hk-celebrity-tutors-raking-big-bucks-20130407>
- Radio interview, University FM, Malta, 30 April 2013, rebroadcast 3 May 2013 (30 minutes)
http://campusfm.um.edu.mt/pages/webcastspages/Winter_13/university_matters_mainpage.html#series_6
- *L'Actualité*, Canada. [Journalist conducted interview on 29 April 2013]
- 'Educational seminar in analyzing supplementary schools [buxiban]', *Apple Daily*, 8 June 2013
<http://hk.apple.nextmedia.com/news/art/20130608/18289526>
- 'Majlis Event Sheds Light on Impact of Shadow Education in Ras Al Khaimah and the UAE'. *Al Qasimi Foundation*, 17 March 2014
http://www.alqasimifoundation.com/en/newsandevents/news/MajlisEventShedsLightonImpactofShadowEducationinRasAlKhaimahandtheUAE.aspx?utm_source=March+2014+AOF+Newsletter+%28English%29&utm_campaign=2014+March+Newsletter+%28English%29&utm_medium=email
- 'Regulating Private Tutoring', UNESCO Bangkok, 31 March 2014
<http://www.unescobkk.org/education/news/article/regulating-private-tutoring>
- 'Faut-il avoir peur de l'école de l'ombre?', *Le café pédagogique*, 12 June 2014
http://www.cafepedagogique.net/communautes/EducationAsie2014/default.aspx?Paged=TRUE&p_PublishedDate=20140612%2019%3a41%3a00&p_ID=1&View=%7bc9d51a19-0dd3-4ca9-b088-a24d58cdbff3%7d&PageFirstRow=11

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- 'UST Joins Intercultural Discussions on Shadow Education' (with photograph). *The Academia* (University of Santo Tomas, Philippines), July 2014, p.41.

e) Dissemination workshop

The workshop was held at HKU on 28-29 April 2014. It was entitled *Researching Shadow Education: Findings and Methodological Lessons from Diverse Cultures*. It brought together 20 participants: 14 HKU colleagues who were researching on shadow education (mostly PhD and Masters students under the supervision of the Fellowship holder) and six counterparts from institutions in Philippines, Iran, Jamaica, Croatia, Malaysia, and Mainland China. Four of these six counterparts had used adaptations of the instrument devised by the Fellowship holder in Hong Kong for use in their own countries. The two-day workshop was an intensive period for co-inquiry about the strengths, weaknesses and potential of a range of methodological approaches for research in shadow education.

Following the spirit of the colloquium, one participant organized a related event in her own university in Manila, Philippines. It was entitled "*Researching Shadow Education - Implications to Students' Performance*", and held at the University of Santo Tomas on 27 June 2014. Mark Bray gave a keynote speech which elaborated on the messages from the HKU event.

The work is now moving to a permanent record in the shape of an edited book. A contract has been signed with Springer (Dordrecht) for publication in the series CERC Studies in Comparative Education.

7. Other impact

The work has led to significant knowledge exchange with:

- UNESCO,
- OECD,
- governments with whom I had interaction via UNESCO and directly, and
- providers of shadow education;

It has also led contributed to partnerships with scholars in the universities listed above.