Shadow education in Latin America: Assembling the jigsaw

Educación en la sombra en Latinoamérica: armando el rompecabezas

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Abstract:

Shadow education is a widely used metaphor for private supplementary tutoring, i.e. instruction in academic subjects on a fee-charging basis outside school hours. The metaphor is used because much tutoring mimics schooling. Thus, as the curriculum changes in the schools, so it changes in the shadows; and as schooling grows, so does the shadow. Initially with particular prominence in East Asia, albeit with deep roots elsewhere, shadow education has expanded worldwide. The phenomenon has been mapped in Africa, Asia, Europe, the Middle East and North America, but has received modest attention in Latin America. This article provides an overview of the phenomenon in the region using available data and stressing the need for further research. It presents global as well as Latin American contextual factors and drivers of demand before turning to data on the scale, nature and suppliers of shadow education. The assembled picture then permits commentary on educational and social impact, and on policy implications.

Keywords: Latin America, private tutoring, regulations, shadow education, social inequalities, supplementary education.

Resumen:

La educación en la sombra es una metáfora ampliamente utilizada para describir las clases de apoyo privadas, es decir, la enseñanza de materias académicas fuera del horario escolar mediante el pago de una tarifa. Y se emplea porque las clases de apoyo imitan, en gran medida, la educación escolar. Así, cuando los planes de estudio cambian en los colegios, también lo hacen en la educación en la sombra, del mismo modo que esta aumenta cuando crece la educación escolar. Con especial

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preeminencia en sus inicios en Asia Oriental (aunque con raíces profundas en otros lugares), la educación en la sombra se ha extendido por todo el planeta. El fenómeno se ha estudiado en África, Asia, Europa, Oriente Medio y Norteamérica, pero ha recibido poca atención en Latinoamérica. Este artículo ofrece un resumen del fenómeno en la región a partir de los datos disponibles y resalta la necesidad de investigación adicional. Presenta los factores contextuales y las claves de la demanda a nivel global y en Latinoamérica antes de centrarse en la escala, la naturaleza y los proveedores de educación en la sombra. Por último, la imagen formada permite examinar el impacto social y educativo, así como las implicaciones de las políticas.

Palabras clave: Latinoamérica, clases de apoyo privadas, regulaciones, educación en la sombra, desigualdades sociales, enseñanza suplementaria.

1. Introduction

Recent decades have brought global growth of the so-called shadow education system of private supplementary tutoring. The shadow metaphor is widely used in the academic literature, at least in the English-language,[1] on the grounds that much supplementary tutoring mimics regular schooling. Thus, as the curriculum changes in the schools, so it changes in the shadow; and as schooling grows, so does the shadow. The metaphor is not perfect because mimicry is imprecise. So, while much tutoring is remedial and helps students to keep up with the school curriculum, other tutoring is for enrichment and goes beyond the school curriculum. Nevertheless, the metaphor is evocative and fits the purpose of the present paper.

Initially with particular prominence in East Asia (Zhang & Yamato, 2018), albeit also with deep roots in such countries as Egypt, Greece and Mauritius (Bray, 2009), much shadow education has been reported in Africa, Asia, Europe, the Middle East, and North America (Aurini et al., 2013; Bray, 2021a, 2021b, 2023a; Bray & Hajar, 2023; Joshi, 2020; Runte-Geidel, 2015; Ventura et al., 2006). It has been less reported in Latin America, and this paper aims to make the phenomenon more visible in that region.

Recalling the process of preparing the first global study of shadow education (Bray, 1999), the first author of this article described the process as like "assembly of a jigsaw puzzle with most of the pieces missing" (Bray, 2010, p. 3). Since that date, researchers around the world have delivered many more pieces of the puzzle, thereby permitting assembly of a more complete picture. Recognising that Latin America remains the region in which documentation of shadow education is most sparse, within the constraints of a journal article this paper assembles the jigsaw pieces that can be identified. Ideally, it would present details on all 19 countries of the region.[2] That cannot yet be done because of data

scarcity, but some sort of picture can nevertheless be constructed. The picture can be used for comparative analysis both within and across world regions, and can stimulate further clarification of the phenomenon in Latin America.

The paper commences with definitions, methods and the conceptual framework. It then turns to the scale and nature of shadow education in the region as revealed by documents in a range of languages.[3] Next, the paper focuses on the suppliers of shadow education, including not only commercial enterprises but also informal suppliers of various kinds and teachers who offer tutoring alongside their main duties. From this commentary, the paper turns to the educational and social impact of shadow education around the region, and to policy implications. The final section summarises and highlights some specific domains deserving further research.

2. Definitions, methods and conceptual framework

2.1. Definitions

For present purposes, and in line with the general literature (Hajar & Karakus, 2022), shadow education is defined as supplementary tutoring in academic subjects on a fee-charging basis outside school hours. As noted elsewhere (Bray et al., 2015, pp. 4-6), this definition cannot be watertight. First, it depends on the understanding of academic compared with non-academic. Thus, music and religious studies, for example, can be examinable subjects or extra-curricular for more-rounded personal development, and sometimes with blurred boundaries. Also, while fee-charging normally implies a financial payment, remuneration is sometimes made in services, goods and reciprocal relationships. Further confusion may arise from the word *tutoring*, which many people interpret to mean one-to-one or perhaps small groups, but for this paper includes full classes, sometimes with hundreds of students. This tutoring, moreover, may be delivered either with physical presence or online (Ventura, 2008; Ventura & Jang, 2010). Nevertheless, despite potential ambiguities, the definition is adequate for present purposes.

The next question concerns terminologies in Latin America. In Portuguese (as used in Brazil), the main terms for the phenomenon are *cursinhos*, *explicações*, *ensino suplementar* and *reforço escolar*, while in Spanish (as used in the rest of the region), the main terms are *clases particulares*, *refuerzo escolar*, *apoyo escolar*, and *enseñanza suplementaria*. Again, these terms are loose insofar as supplementary education is not necessarily private. Indeed, such countries as Argentina and Brazil have much public supplementary tutoring, though again with blurred boundaries reflecting remunerated and unremunerated voluntary labour (see, e.g., Nasif et al., 2017; Zago, 2008; Zibetti et al., 2012). Imprecision in vocabularies requires care and is another reason why the topic has remained indistinct and hidden.

Finally, the present paper is concerned only with shadow education in primary and secondary schooling. The phenomenon

does exist at pre-primary and post-secondary levels; but it is most evident in primary and secondary education, and the focus on these levels permits greater depth.

2.2. Methods

The starting point for this paper was identification of items in the literature about shadow education in Latin America through bibliographic databases and Google searches in Spanish, Portuguese and English. This process delivered a core body of 62 articles and chapters, from which the authors followed up items in the references of those publications. The authors used their personal networks to enlarge the collection, including with dissertations and unpublished materials, and finally secured about 110 items. They then commenced assembling the jigsaw, employing their knowledge of the global literature for thematic analysis. The first author of this paper has been researching the theme for over 25 years, and his Latin American experience includes interactions with colleagues, particularly in Mexico and Brazil, in connection with the Spanish and Portuguese versions of one of his books (Bray, 2009). He has also held extensive parallel discussions under the UNESCO umbrella in Argentina and Chile. The second author has been researching the theme for almost as long, with particular focus on Brazil alongside Portugal, Canada, Korea and other countries. When they had drafted the article, the authors solicited comments through their academic and professional networks,[4] and secured elaborations and triangulations from this process.

On a final methodological note, Brazil provided the largest number of publications. With 203 million people, this country has over one third of the Latin American population. That fact has implications not only for the number of students receiving shadow education but also the number of researchers investigating it. At the same time, the authors are struck by the non-existence of identified literature even in such countries as Venezuela (population 28.8 million), Guatemala (18.1 million), and Bolivia (12.8 million). This pattern reflects the absence of research rather than an absence of the phenomenon.[5] It underlines the shortage of jigsaw pieces and the need for further attention to the topic.

2.3. Conceptual framework

For reasons of length, this article must restrict itself to an overview rather than following threads to multiple avenues of curriculum, economics, pedagogy, sociology, etc. In this respect it follows the frameworks of predecessor overviews (e.g., Bray, 2021a, 2023a; Bray & Hajar, 2023; Joshi, 2020; Silova, 2010). The conceptual framework is mostly at the macro-level, and the identified policy implications are mainly for governments rather than for entrepreneurs, families, teachers, or tutors.

Among components of such analysis are the drivers of demand for shadow education. A fundamental driver across the globe is social competition (Aurini et al., 2013; Entrich & Lauterbach, 2021). Education, including private tutoring, is recognised as a key instrument for mobility from lower to higher social classes, and for retention of social status among those

already in upper strata. Competition is intensified by geographic mobility within the labour market, and by globalisation which adds international forces to national and sub-national ones.

These patterns are nuanced by the nature of social inequalities. Researchers have shown correlations between shadow education and societies with wide inequalities, and between shadow education and school systems that have high-stakes examinations (Byun et al., 2018; Entrich, 2021). In all systems, shadow education is an instrument on the one hand to avoid being left behind and on the other hand to secure differentiation from the masses and forge ahead. Alongside the private sector, however, are various initiatives by governments and civil society to increase opportunities for the most disadvantaged. One example is the Institutional Improvement Plan in Argentina, which promotes tutoring to strengthen students' academic trajectories (Dirié et al., 2015; Landau, 2016). Another example is the initiative of Chile's Ministry of Education entitled *Plan de Reactivación Educativa*, which enhances basic language-related skills among public primary school students. The design specifically targeted students who had fallen behind during the disruptions caused by Covid-19.[6]

Per capita income is another important contextual variable. Low-income countries generally have under-resourced education systems (see, e.g., Bray, 2021b). Some families then seek shadow education to compensate for inadequacies in public schooling, though other families respond by enrolling their children in private schools. However, the latter group of families may still invest in shadow education, i.e. securing private plus more private provision. This way, wealthy families give their children three catalysts for achievement: strong cultural capital, private schooling, and private tutoring.

Inadequate government investment in schooling also shapes shadow education through another channel. Underpaid teachers commonly view provision of tutoring as an obvious way to supplement their incomes, and supply of tutoring then creates demand. In some settings, teachers provide tutoring to their own students, and are tempted to cut content from their regular classes in order to increase demand for their private lessons (Dawson, 2009; Jayachandran, 2014). Even if teachers do not tutor their own students, they may devote more effort to their private work than to the regular classes, for which they are paid anyway. As tutoring enrolment rates rise, shadow education becomes normalised so that teachers assume that most or all needy students are receiving tutoring.

From these global remarks, the next question concerns the characteristics of Latin American contexts. In many respects, Latin American education systems resemble those of others around the world, with division into grades, terms/vacations, primary/secondary sections, lessons structured by timetables, examinations, and other common features. Indeed, this is so standardised across the globe that it is taken for granted without comment. At the same time, Latin American cultural

and political contexts do distinguish that continent from others in both schooling and shadow education.

A useful starting point is the overview presented by Rivas (2022, p. 1). During the 1990s, he remarked:

> many Latin American countries were still recovering from the traces of military dictatorships. The health of the democracies was still weak…. Latin American countries… [also] received the attention of several international agencies that tried to implement neoliberal reforms in the education field and other public goods. This context contributed to a relatively homogeneous landscape in Latin American education reforms.

However, the opening decades of the 21st century, Rivas added (2022, p. 1), brought more intense and sometimes contradictory agendas:

> Governments of different ideologies followed similar steps towards standardized accountability and, at the same time, diverse strategies promoting educational justice…. The agenda became more complex, and policy trajectories suffered several reconfigurations as governments changed (in some cases radically).

Thus, although the region does not have countries at the bottom of the income scale, it does show significant diversities as well as commonalities. Furthermore, many of these countries have huge income disparities. In Latin America, the top 10% of individuals hold 55% of national income, compared with 36% in Europe (Chancel et al., 2021a, p. 30). According to the country sheets of the *World inequality report 2022* (Chancel et al., 2021b, pp. 3-29), inequalities are particularly evident in Argentina, Brazil, Chile, and Mexico. The unequal societies have school systems that mirror and maintain the inequalities. In many cases these patterns have arisen by default rather than deliberate government policy, but processes associated with neoliberal ideologies have permitted expansion of shadow education as well as private schooling (Domenech & Mora-Ninci, 2009).

Also pertinent are indicators on educational enrolment rates. Among the 19 Latin American countries, officially some pre-primary and all primary schooling is compulsory, and lower-secondary schooling is officially compulsory among 18 of them (D'Alessandre, 2015, pp. 13-16).[7] Further, in 12 of the 19 countries even upper-secondary schooling is officially compulsory.[8] However, variations are evident in enactment of the policies. In parts of Central America, for example, during the mid-2010s half of the boys and girls up to age 17 were not enrolled in secondary school (D'Alessandre, 2015, p. 16). The region as a whole subsequently suffered from economic constraints and then, like the rest of the world, the Covid-19 pandemic (OECD, 2020). UNESCO (2020, p. 16) noted that in the years leading up to 2020, economic growth across the region was practically zero, marking a period of stagnation that contrasted with the strong growth in the first part of the century. Thus, in 2020 Latin America and the Caribbean experienced its worst economic recession since 1900, with a 6.8% drop in

Gross Domestic Product (UNESCO, 2022, p. 16). Again, such economic factors contribute to patterns of shadow education alongside other domains.

Turning to teachers' salaries, Rivas (2022, p. 25) noted wide variations around the region but commonality in salary raises during periods of economic growth. Chile was particularly striking, with an overall rise of 200% in the period 1990-2009 compared with an average of 70% in the rest of the labour market. However, Rivas (2002) added, the improvement was not enough to give prestige to the profession in most countries, especially because of the social issues that teachers were expected to address. Moreover, considerable regional differences may be found within countries, as exemplified by Pinto (2021, p. 285) in Brazil.

Finally, factors relating to out-of-school time for shadow education are shaped by the duration and use of in-school time. In Cambodia, for example, a major reason for high rates of shadow education is that many schools operate on a double-shift system, with each shift having restricted durations (and even single-shift schools have relatively short hours) (Le & Edwards, 2022). This feature means not only that students may desire additional support to compensate for limited instruction during school hours, but also that they have time to receive such additional support even during weekdays. Rivas (2022, p. 24) reported that all the countries reviewed in his book (i.e., Argentina, Brazil, Chile, Colombia, Mexico, and Peru) extended the official school days during the first two decades of the present century, though Chile was the only one to achieve almost universalisation of eight hours a day for schooling.

3. The scale and nature of shadow education

In contrast to schooling, of which multiple facets are statistically well documented throughout the world (see, e.g., UNESCO Institute for Statistics, 2022), very few education authorities collect regular and detailed data on shadow education. Thus, the statistics in Tables 1 and 2 are just snapshots with diverse methodological foundations, coverage and reliability. Nevertheless, they help to construct a picture while again underlining the need for more and better research.

Table 1 presents data from the 2012 national surveys of the Programme for International Student Assessment (PISA) managed by the Organisation for Economic Co-operation and Development (OECD).[9] Students aged 15 were asked whether they received tutoring in two categories. The first category was work with a personal tutor, whether paid or not, and the second category was out-of-school classes organised by a commercial company and paid for by parents. Some students may have been in both categories, while the possibility of fee-free tutoring in the first category blurs the picture for the present paper. Nevertheless, the statistics are instructive. At the top end of enrolment rates are Argentina and Colombia, and at the bottom end is Chile. The high enrolment rates in Argentina

are especially striking in a system that has stressed easy transition from schooling to higher education with the greatest enrolment rate in the region at that level.[10] In contrast, the Colombian picture fits more closely the model found in countries with high-stakes end-of-secondary examinations.[11] Concerning the intensity of study in classes organised by commercial companies, the Peruvian figure at 5.8 hours per week is over twice the Argentinean and Chilean figures at 2.7 hours per week. The majority of reported Latin American enrolment rates were above the global average, though the statistics on intensity were more mixed.

TABLE 1. Shadow education received by 15-year-olds in selected Latin American countries.

	Work with a personal tutor (whether paid or not)		Out-of-school classes organised by a commercial company and paid for by parents	
	Enrolment rate (%)	Intensity (hours per week)	Enrolment rate (%)	Intensity (hours per week)
Argentina	57.1	2.5	45.3	2.7
Chile	29.2	2.4	16.1	2.7
Colombia	51.8	2.4	47.3	3.3
Costa Rica	46.5	2.5	30.4	2.6
Mexico	33.8	3.3	24.5	3.0
Peru	40.4	3.2	36.5	5.8
Uruguay	39.0	3.0	33.0	3.6
Global average (63 countries)	34.8	2.8	28.1	3.4

Source: PISA [2012, as cited in Entrich (2021)].

The statistics in Table 1 have added value insofar as they were collected on a common yardstick across the seven countries. Table 2 complements the table with data from other studies focusing on a range of age groups and with varying samples and methods. The Chilean data highlight the significance of mathematics tutoring compared with science. Across the region and beyond, tutoring in languages (especially English) is also in strong demand since, like mathematics, languages support learning in other subjects (see, e.g., Ventura & Gomes, 2023). The Argentinean study (Cámara & Gertel, 2016, p. 139) also found diversity across subjects, with shadow education enrolment rates of 92.4% among students who subsequently enrolled in medical sciences, compared with 39.2% in economic sciences, 30.9% in

dentistry, and 17.5% in law. Also noteworthy was that the costs for medical students were three times those for economics students, in part because of the longer duration of courses but also because of higher monthly fees.

TABLE 2. Further indicators of shadow education in selected Latin American countries.

Argentina	From a sample of 360 university freshmen admitted to four schools of a national university in 2013, Cámara and Gertel (2016) found that 36.4% had used private supplementary tutoring provided by individuals or private companies to prepare for the university entrance examinations.
Brazil	Mariuci et al. (2012, p. 89) surveyed students in the first four grades of high schooling in southern Brazil. Among them, 28% were receiving private tutoring, and 38% had done so when in primary school. Galvão (2022, p. 55) analysed 2014 national data from 5.4 million candidates for the High School National Examination (Exame Nacional do Ensino Médio, ENEM) who had been asked to fill a questionnaire about supplementary support and other matters. He found that 19% of students had received pre-vestibular (selection examination) support at some stage in their school careers, 17% had received support in foreign languages, 62% in computer science, and 34.2% in other subjects – and presumably some students were in several categories.[12] Castro (2013, pp. 123-124) studied patterns in Porto Alegre. Among her primary school sample, 27% of students in private schools, 23% of students in state schools, and 11% in municipal schools were receiving private tutoring. In the last year of high school, enrolment rates were 36% in private schools, 17% in state schools, and 11% in municipal schools. Datafolha (2022), having surveyed 1323 guardians/parents of 1863 students in three regions in 2022, reported that 24% of students received supplementary tutoring. For 46% of them, the tutoring was fee-charging and for 54% it was fee-free. Tutoring had expanded since the pre-pandemic era.
Chile	Among the eighth-grade students surveyed by the Trends in International Mathematics and Science Study (TIMSS) in 2019, 23% were receiving tutoring in mathematics and 9% were doing so in science.[13]
Colombia	Gómez et al. (2020) examined the impact of test-preparation courses on performance in the national school-leaving examination in 2012. They reported (p. 46) the locations of these courses as follows: 45% in the students' schools taught by the schools' teachers, 26% in their schools taught by external personnel, 9% in specialist institutions, 1% in universities, and 18% in more than one category.

Cuba	Responding in 2021 to an enquiry from UNESCO,[14] the Cuban government reported "significant increase in complementary classes and private activities". The response included a link to a news-agency report (Univision, 2016). That report began by noting that "Cuba says that its school system, public and free, is one of the great achievements of its revolution, a force that promotes social equality and that practically ended illiteracy throughout the island". It then added that "against all expectations, the burgeoning business sector has quietly created something that closely resembles a private education system, in which thousands of children have enrolled in dozens of courses taken after school or at weekends". Another report (Alfonso, 2013) had commented on the boom in private tutoring within months of issue of a regulation by the Ministry of Labor and Social Security permitting such tutoring.
Mexico	Chang (2016), after surveying 40 seventh-grade students in one school, found that 45% of them (especially females) received tutoring. The head of a large tutorial company, CONAMAT, reported that about 2 million students had been attended their courses over three decades (Uribe, 2023). Data from CENEVAL context questionnaires (2012) administered with a test to obtain a high school diploma indicated that 7 out of 10 test takers had enrolled in private tutorial courses.

Concerning structure, while some tutoring is one-to-one, other formats embrace small groups and large classes. Ventura and Gomes (2013, p. 140) highlighted demand for tutoring in Brazil, on one side among low-achieving students who might have to repeat grades if performing inadequately and on another side by high-achieving students seeking to distinguish themselves at watersheds during secondary schooling (see also Galvão, 2020). Many tutors worked with individual students in informal environments such as verandas, back yards, and dining rooms, but others held formal classes each with over 40 students in different shifts. Indeed, Tófoli (2002), also referring to Brazil, mentioned tutorial classes exceeding 100 students that were popular because the tutors had jokey yet serious styles.

Online tutoring has also become increasingly common, accelerated by school closures and social distancing during the Covid-19 pandemic that hit in 2020. A 2018 assessment reported that only 23% of rural households were connected to the internet compared with 67% of urban households (ECLAC, 2020, p. 3). In contrast, 2022 figures suggested that, with overall access of 78%, Latin America had even overtaken China in this domain (Castellanos, 2023).

Also needing recognition are overlaps and interrelationships with public fee-free and subsidised supplementary tutoring.

Chile, for example, has had a scheme sponsored by a non-governmental organisation (NGO) in partnership with the government through which college students have provided tutoring for primary students on a voluntary basis (Cabezas et al., 2021). Recipients of the tutoring were charged fees, and the support was provided during school hours. At a higher level, Argentinean government policy has emphasised easy transition from school to university, but some universities recognise that the students poised to enter their programmes are inadequately prepared and therefore organise fee-free tutoring both before the students formally enter the universities and also alongside the formal programmes as the academic year progresses (Nasif et al., 2017). Some students choose these fee-free programmes while others attend fee-charging programmes (or neither, or both). With slightly different orientation, many students in Brazil attend tutorial classes called *cursinhos populares* designed as a social service for students in lower socio-economic strata who would otherwise be even more disadvantaged (Zago, 2008; Kato, 2015; Lopes, 2015; Groppo et al., 2019). The courses are commonly operated by volunteers, mostly students, and are almost or completely free of charge.

4. Suppliers of shadow education

Three main categories of shadow-education suppliers are considered here. First are companies operating locally, nationally and internationally. Second are informal tutors operating full-time or part-time. And third are serving teachers who offer private tutoring to secure extra incomes.

4.1. Commercial enterprises

To illustrate diversity in provision, Costa et al. (2012) provided specific examples of five tutorial enterprises in Brasilia, capital of Brazil. Table 3 summarises the features of these enterprises, elaborated as follows:

- Centre B1 began as a community venture that later became commercial and continued to award scholarships on merit and to help low income families. It had a franchising model, though all its centres were in Brasilia. It offered support in all high-school subjects. Students' attendance averaged four hours per week, and the centre operated from 7.40 am to 11.00 pm.

- Centre B2 was associated with a specific school and sought to combat enrolment of students in other centres. The services included both pre-set curricula and more flexible courses, together with psycho-pedagogical guidance for various levels; payment was managed through the school. Most students sought the support immediately before their examinations, with particular demand for mathematics and physics. The centre was staffed by teachers from the school, and operated from 8.00 am to 9.00 pm. It was publicised in the school through spoken announcements at the beginning of the academic year, through posters

around the campus, and on the official Facebook page.

– Centre B3 was franchisee of a global company, with procedures following those of the parent enterprise. It opened every working day except Wednesday from 8.00 am to noon and from 3.00 pm to 6.00 pm, and offered courses in Portuguese and mathematics to students of all years including higher education. As this centre had opened recently, only 34 students were enrolled. They received about two hours of tutoring per week for each subject. The centre's team comprised two people plus the director. Advertising was achieved through word-of-mouth and distribution of pamphlets.

– Centre B4 began as a small family operation that had become franchised, with 317 students in the Brasilia region. It operated every day except Sunday, with mornings and evenings during weekdays and the whole day on Saturdays. Nine employees provided individual and group tutoring to elementary and high school students, who usually spent about four hours a week in the centre. The highest enrolment was for mathematics, followed by Portuguese, physics, chemistry, and biology. Students were mostly recruited through word-of-mouth.

– Centre B5 had once belonged to a multinational franchisee, but was currently under its own management and operated every weekday from 8.00 am to 7.00 pm. Its three employees offered support to all years and in all subjects up to high school, plus mathematics in higher education. The 35 to 45 students who attended the centre all year spent two to three hours per week for each modality of support. The majority received help in mathematics, and also in Portuguese, especially for fifth- and sixth-grade. The centre publicised its services by talking with teachers and distributing pamphlets.

The diversity of these centres is striking, and doubtless further diversity could have been identified.[15] The researchers (Costa et al., 2012) also noted diversity in age groups served. For centres B1 and B2, demand was greatest in the third year of high school in preparation for the college-entrance examination (vestibular). However, the director of centre B3 stated that the strongest demand was for children up to the age of eight, and the clients of centre B4 were from early primary to ninth grade with the strongest demand in grades four-to-six, eight and nine. A similar pattern was reported in centre B5, of which the director critiqued shortcomings in literacy levels in public primary schools and focused especially on literacy for students in the fifth and sixth grades.

In a different context, Cámara and Gertel (2016, p. 139) noted that among the surveyed Argentinean students who had prepared for university entrance,

TABLE 3. Features of five tutorial centres in Brasilia.

Centre	Number of students	Levels of teaching	Number of tutors	Franchising
B1	5000	Pré-PAS, concursos [entrance examinations for professions], ensino médio [secondary education], all subjects	90 in all centres	Yes / 7 regional centres
B2	280	Primary, secondary, pré-vestibular [pre-university]	43	No / only 1 centre
B3	34	All levels	3	Yes / international
B4	317	Primary and secondary	9	No
B5	35-45	All year groups in non-higher education, and mathematics in higher education	3	1 centre (already franchised)

Note: PAS = Programa de Avaliação Seriada (serial assessment program). This is an entry system used by some Brazilian higher education institutions. It involves assessments conducted over three years of high school, which contribute to the final grade of applicants. The scores are used to select candidates for undergraduate courses.
Source: Costa et al. (2012, p. 5).

three out of four had taken courses offered by commercial companies. Most students (79%) reported that the companies' pedagogical strategies included a mix of theoretical and practical classes to raise confidence in the examinations. Some interviewees had received individual tutoring, but 59% had received group support.

Concerning individual tutoring, some companies act as brokers rather than direct providers. Thus, in Colombia, for example, a company called Tutores en Casa allows clients to identify tutors in their neighbourhoods, who will provide support across the age range from primary to university levels.[16] A counterpart in Chile is called Superprof.[17] These are

examples of internet-based conduits for the promotion of companies and individuals providing tutoring. Potential clients can undertake comparative analysis across pricing structures, frequencies of sessions, instructional formats, the aesthetic appeal of tutors (with most websites showing photographs of the tutors), and other pertinent features. On the side of companies and individuals offering tutoring, this modality offers exponential access to their potential market, thereby significantly augmenting their business prospects.[18]

Turning to international tutorial operators, among the best known is Kumon. The company was established in Japan in 1958, and in 1974 opened a centre in the USA (Ukai, 1994). Currently it operates through franchises in 60 countries, including 11 in Latin America (Kumon, n.d.).[19] The original curriculum focused only on mathematics, but in the Latin American countries it includes English and, in many centres, either Spanish or Portuguese. A counterpart company is Wizard, founded in Brazil in 1987 and now also operating in 14 countries, including Argentina, Bolivia, Chile, Colombia, Costa Rica, Ecuador, Mexico, Panama, Paraguay, and Peru. Other prominent international enterprises in the region include Sylvan Learning, Tutor Doctor, Mathnasium, ALOHA Mental Arithmetic, and C2 Education.

The above accounts primarily concern in-person tutoring. As mentioned, in recent times internet tutoring has much expanded, and is able not only to reach distant places within countries but also to cross national borders. Research updates will doubtless include focus on this phenomenon in Latin America alongside studies in other regions such as those by Wisniewski et al. (2020).

4.2. Informal providers of tutoring

Among informal providers are diverse sub-categories. At the youthful end of the age spectrum are university students who seek extra pocket money, and at the older end are retirees who want to remain useful to society while still securing some extra earnings. Between these two sub-categories on the age spectrum are other informal workers, some of whom choose tutoring because they have not found other employment.

Nascimento (2007) examined the nature of informal operations in Rio de Janeiro, Brazil, commencing with the advertisements that the tutors *(explicadores)* placed near the doors of their residences. The tutors that she interviewed supported students from both public and private schools and commented on both the differences in the quality of teaching and the implications for tutoring. Private-school students sought tutors to assist with demanding homework for which their parents lacked time and/or ability to help. The tutors similarly perceived private schools to be better organised in the school calendar, test dates, deadlines for handing in assignments, textbooks, and exercises. Public-school pupils, in contrast, sought tutors to compensate for inadequacies in schooling (Nascimento, 2007, pp. 97-98).

Gomes et al. (2010b), employing an adapted version of the questionnaire constructed by Costa et al. (2008), took a sample of 358 students aged 14 to 20 in Brasília, the Federal District of Brazil. The researchers found that over one third of the respondents had received fee-charging tutoring outside their schools. They noted that the academic reinforcement classes were predominantly used by high school students to strengthen their academic backgrounds rather than to address problems stemming from academic failure. These Brazilian researchers also found that participation in reinforcement classes was more common among students from private schools than from public ones.

In the Argentinean context, Cámara and Gertel (2016, p. 136) noted that individual tutors had been increasingly displaced by companies, though individuals remained popular in lower levels of education. Marketplace dynamics could usefully be explored further within the region, together with questions about the qualifications and effectiveness of informal tutors compared with their company-employed counterparts.

4.3. Teachers as tutors

Provision of supplementary tutoring by serving teachers is especially common in low-income parts of Asia and Africa, and also evident in many middle-income and even high-income countries in Europe, the Middle East and elsewhere (Bray, 2021b; Bray & Hajar, 2023; Duong & Silova, 2021). Anecdotal sources also report this phenomenon in Latin America, but it has received even less attention than other forms of provision. Remarking on the phenomenon in Brazil, Ventura and Gomes (2013) highlighted the circumstances in private schools that illegally retain teachers without written contracts and thereby create precarious labour conditions. In some cases, the researchers added, "the tutors are completely invisible, given that they remain in the shadows and can only be located by asking people in the neighbourhood" (p. 140). Perhaps for such reasons, the Brazilian research by Mariuci et al. (2012) did not seem even to consider teachers as a category of tutoring providers. The decision (either deliberately or by default) to omit the category maintains the hidden nature of this phenomenon, which needs focus not only for its social implications but also because of the potential backwash on schooling.

One study that remarked on teachers working as tutors in Chile had some intriguing allusions. Lasekan et al. (2019, p. 58) analysed websites for tutors of English, and found that the greater the years of tutoring experience, the lower the tutoring fees being charged. Implying that many of these tutors were full-time teachers supplementing their incomes, the researchers suggested that teachers who had become more senior in the mainstream would have higher incomes from their schools and be less in need of substantial incomes from tutoring. Again, this pattern deserves further investigation, both in Chile and elsewhere.

5. Educational and social impact

Research on the educational impact of tutoring has diverse and inconsistent

findings (Bray, 2023b, pp. 735-738). Families that invest in tutoring presumably feel that it has a strong probability of improving their children's grades, or at least is worthwhile as an insurance policy when most peers seem to be investing in it. In practice, however, much depends on the quality and format of the tutoring and on the abilities and motivations of the learners. Moreover, tutoring may compete with schooling by making students tired and perhaps bored in school if they have already learned materials through tutoring.

Among items in the global literature is a Chinese study by Guo et al. (2020), which analysed data from a grade 8 nationally representative survey. Overall, the researchers found that tutoring in mathematics and Chinese improved students' test performance, albeit only modestly (p. 338). Tutoring, they added, achieved this impact mainly by enhancing test-taking skills or by helping to accumulate subject-specific knowledge rather than by improving general cognitive skills. Effects were larger for low-performers, girls, and students with wealthier and better-educated parents.

A contrasting study was conducted by Guill et al. (2020) in Germany, using a national dataset for students who had commenced grade 9 and reached grade 11 two years later. Data on tutoring were matched with data on academic achievements in mathematics and German. The analyses "revealed neither global effects of private tutoring nor effects of its instructional quality on students' grades" (Guill et al., 2020, p. 282), though students' satisfaction with their schooling was enhanced by the support dimension of tutoring.

Concerning Latin America, a Colombian study by Gómez et al. (2020) deserves attention. The researchers focused on the contributions of supplementary tutoring to performance in the Saber 11 end-of-secondary-schooling examination, with data from 424,589 students who had filled a questionnaire prior to sitting the examination. Among them, 45% had received preparatory training for the examination in their own schools (in many cases free of charge, but also possibly fee-charging), 26% had received training in their schools from external personnel (more likely fee-charging), 9% had received (fee-charging) training in private tutorial institutions, 1% from university personnel (either fee-charging or fee-free), and 18% in several categories (Gómez et al., 2020, p. 46).

The Colombian dataset permitted analysis by multiple variables, including gender, family income, location, duration of tutoring, and category of institution providing the support. The authors concluded that the tutoring did make a difference, particularly that provided by specialist institutes. The impact was stronger for males, and for students in private schools and higher socio-economic strata. Nevertheless, Gómez et al. added (2020), the overall returns were modest, and enrolling in a preparatory activity was "probably insufficient

to excel if the student does not have a good educational background" (p. 69). In other words, much depended on the abilities of the students to make use of the support, which was significantly shaped by earlier learning. Noting the multitude of variables, the researchers concluded that in general the tutoring exacerbated the already-unequal opportunities for higher education.[20]

Complementing the Colombian research is an evaluation of impact for grade 4 students in 85 schools in the Chilean scheme mentioned above through which an NGO in partnership with the government organised college students to tutor primary students (Cabezas et al., 2021). The scheme was assessed to have some impact on language and mathematics scores, and also on sustained reduction of drop-out rates six years later.

Another study utilised a dataset for the entrance test to the major university in Northeast Brazil (Guimarães & Sampaio, 2015). The dataset included personal characteristics and educational routes, and permitted the researchers to assess the effects of both private and public tutoring. They expressed caution over the possible effects of unobserved variables but stated (p. 50) that both forms of tutoring significantly increased the students' scores. The researchers stressed the importance of this finding for public tutoring that aimed to compensate for the advantages received by wealthy families. Nevertheless, they also found that private tutoring had an effect twice that of public tutoring.

Related, differential rates of shadow education may be noted between private and public schools. Thus Gomes et al. (2010a, p. 63) showed shadow-education enrolment rates of 51.9% in a Brazilian private secondary school compared with 22.0% in a counterpart public school. This finding was echoed by Mariuci et al. (2012, p. 89) with an even wider gap of 86.3% compared with 13.7% in the schools that they investigated. Castro (2013) and Galvão (2022) also highlighted the forces for social reproduction through use of shadow education.

Finally, Llanos (2022) presented data on household expenditures in Mexico. The poorest families were reported to invest 10% of their educational expenditures on supplementary education *(enseñanza adicional)*, while the richest invested nearly 25%. The national average was 13%.

6. Policy implications

Governments around the world have begun to pay more attention to shadow education, but with considerable variation in the seriousness with which it is on policy agendas. They note on the positive side that private supplementary tutoring expands learning and therefore human capital for wider economic and social development. It also provides employment for tutors and support personnel; and when teachers secure supplementary incomes through tutoring,

they may be more willing to stay in the teaching profession. As mentioned, however, shadow education may exacerbate social inequalities and negatively affect schooling.

At one extreme in the policy domain is China, where government attention to shadow education expanded by stages during the 2010s and culminated in a 2021 policy to suppress the tutoring sector (Zhang, 2023, p. 61). This suppression was ostensibly driven by concern about the study burden on students who received tutoring on top of school-administered homework. It was also driven by concern about capitalisation of the education sector and a desire to retain the dominant status of schooling. At the other extreme in the policy domain are *laissez faire* attitudes evident in such countries as Angola (Chionga, 2018, p. 86) and Yemen (Bray & Hajar, 2023, p. 62). Tutorial companies may be regulated as businesses, but beyond that the authorities have paid little attention to such matters as class size, curriculum, prices, or tutors' qualifications.

In Latin America, the *laissez faire* approach seems to dominate. That approach has been remarked upon, for example, in Argentina (Cámara & Gertel, 2016, p. 135) and Chile (Lasekan et al., 2019, p. 49), and is evident from the reported absence of regulations in seven other countries.[21] Venezuela, by contrast, is among countries that have some regulation. As far back as 1998, regulations on private-sector institutions included ones providing supplementary services as well as schooling (Venezuela, 1998, articles 21-22), and approvals were required on such matters as finance, facilities, and staff credentials. Governments elsewhere would be well advised to pay more attention to regulation (not least to reduce the likelihood of shadow education becoming a serious problem) by steering it upstream rather than delaying until it is too late (Zhang, 2023). For example, one specific context in which regulations are desirable has been highlighted by Lasekan et al. (2019, p. 47). Their research was online marketing in Chile by tutors of English, with foci including qualifications, prices and years of experience. The researchers highlighted the potential for tutors to present fraudulent information, which could have broader ramifications for (mis)trust in e-commerce.

Patterns in Cuba are also noteworthy. As remarked by the Univision (2016) report mentioned in Table 2, the Cuban government takes pride in the public system, and permits private schools only for the children of diplomats and foreign businessmen. Yet some teachers have covertly provided private tutoring alongside their public duties, and regulatory provision in 2013 opened the door for legal private tutoring. As reported by Alfonso (2013) and Univision (2016), this was an unanticipated dimension of the 2013 regulations, which had mainly been introduced for language classes, child-care, music, aerobics, etc. Univision described the expansion of the private sector as "against all expectations", and it is especially significant in a

society that retains strong control by the state.

Across the region, a further domain deserving more attention concerns the boundaries between fee-charging and fee-free tutoring provided not only by governments but also by individuals and community bodies. This particularly relates to the *cursinhos populares* in Brazil (Groppo et al., 2019; Kato, 2015; Lopes, 2015; Zago, 2008). It also relates to patterns in Argentina touched upon by Cámara and Gertel (2016), and no doubt in other countries. For focus on shadow education as defined in this paper, clarity is needed first on which forms of support are fee-free and which are fee-charging, and second on the scale of the fees in the latter category.

7. Conclusions

This article has presented a picture of shadow education in Latin America by assembling various jigsaw pieces. The picture is incomplete because many pieces are missing. Even in other world regions much more research is needed to secure reasonably complete pictures, and in Latin America the topic has been particularly under-researched. Neglect of the theme is illustrated by its absence from the two-volumes work (44 chapters, 1225 pages) edited by Jornitz and Parreira (2021) entitled *The education systems of the Americas*; and it is similarly absent from the regional studies of Ornelas (2019) and UNESCO et al. (2022). Yet as shown by this paper, shadow education has a backwash on school systems and has far-reaching social, economic and policy implications.

As noted above, Latin America shares many educational, social and economic features with other world regions, but does have distinctive characteristics. School enrolment rates are relatively high, with 12 of the 19 countries even having compulsory upper-secondary education. In the wider context, Rivas (2022) highlighted the neoliberal reforms introduced across the region during the 1990s which contributed to a relatively homogeneous landscape. The present century, however, has brought diverse reform agendas characterised in many countries by policy swings resulting from leadership changes and economic fluctuations. At the same time, much diversity is evident within individual countries. Brazil has particularly notable diversity, and is distinguished from other countries in the region not only by use of Portuguese as its official language but also in the extent of social inequalities.

Further research could usefully look closely at correlations between shadow education and various contextual factors. A starting point might be the nature of public examinations, and the extent to which they have high stakes, e.g. for admission to universities. Brazil, Chile, Colombia, and Mexico are among countries with high-stakes examinations that pressure students with, in the Brazilian case, additional burdens within the cycles of primary and secondary schooling. As noted above, Argentina has a much more relaxed entry system

for higher education. The commentary on the PISA statistics in Table 1 described them as instructive, but they are also enigmatic insofar as they show Argentina as the highest and Chile as the lowest. One question is whether the statistics can be taken at face value given methodological issues in this domain. In any case the numbers certainly deserve follow-up to discern more clearly the factors shaping demand and supply.[22]

Other dimensions for further investigation include teachers' salaries, which have shown wide variations across the region and within some individual countries. In all six countries studied by Rivas (2022), salaries improved significantly during periods of economic growth, though could not always be maintained. In several countries, reform policies linked revenue for schools, and even for teachers within those schools, to the academic performance of students. Research could usefully analyse not only the extent to which low or high salaries shaped the inclinations of teachers to offer private tutoring, but also whether schools and teachers used tutoring as a mechanism to improve their schools' performance in order to secure greater government funding.

A related question could apply to policies on the duration of school days. Although this variable was mentioned above, no Latin American study has been reported on the implications for shadow education from lengthening or retaining existing durations. Research could usefully explore not only the number of hours for each grade but also how those hours were used. In other settings, students have prioritised external tutoring over schooling (even absenting themselves from schooling because it is perceived as wasting time) since external tutors have had more attractive pedagogical skills and have demonstrated specialist expertise in strategies for external examinations (see, e.g., Bhorkar & Bray, 2018; Moreno, 2022).

Further research could also usefully consider the nature and roles of tutorial enterprises, differentiating for example between ones that are small and locally focused, others that operate nationally through franchises or direct operation, and ones that operate internationally. Their modalities include online as well as in-person tutoring, and some devote much effort to training their staff in order to provide educational quality. Among avenues to follow up could be the contrasts noted by Costa et al. (2012) who, comparing a sample of tutorial enterprises in Lisbon (Portugal) and Brasília (Brazil), noted that while the former generally aimed to support and supplement schooling some of the latter aimed to become alternatives to schooling. Yet alongside them were community operations of various kinds, some operated as NGOs offering *cursinhos populares* for socially disadvantaged students. These observations stress that the shadow sector has much diversity requiring comparison with the relative homogeneity of schooling.

Looking ahead, shadow education is likely to expand in the region. Growth has been a global feature, including even the Nordic countries that have long been respected for the quality of their education systems (Christensen & Zhang, 2021). The fundamental driver is social competition and what Silva and Assis (2019, pp. 474-476) called "domestic support outsourcing" and "transition from meritocracy to parentocracy". Such factors underline the importance of securing more jigsaw pieces to form a set of pictures at sub-national, national and regional levels, and in turn to help devise appropriate policies not only for governments but also for entrepreneurs, families, students, teachers and tutors. And for broader understanding, the set of pictures will be valuable to analysis outside Latin America as well within it.

Notes

[1] The term does not translate easily into some languages, including Spanish and Portuguese, and some literature in those languages retains the English vocabulary. For example, Runte-Geidel (2013, p. 257) referred to the symbiotic relationship "entre la sociedad escolarizada y la existencia misma de la *Shadow Education*", i.e. "between the schooled society and the very existence of Shadow Education". By contrast, the term does translate easily into such languages as Chinese.

[2] These countries are Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Cuba, Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Uruguay, and Venezuela.

[3] In most countries of the region, the dominant official language is Spanish; but Brazil's official language is Portuguese. The paper also draws on much literature in English, especially for the global and comparative remarks and also, in some cases, concerning Latin American countries.

[4] These included personnel with expertise in Argentina, Brazil, Chile, Colombia, Ecuador, Mexico, and Venezuela, and across the region from the Inter-American Development Bank and UNESCO.

[5] Internet searches readily identify advertisements from tutors in these countries. For example, here are three from Caracas, Venezuela: https://www.apprentus.com/es/lecciones-privadas/caracas/apoyo-escolar/apoyo-escolar/refuerzo-escolar-tutorias-atencion-psicope?from_landing_page=true; https://www.tusclases.com.ve/profesores/caracas/, and https://servicios.mercadolibre.com.ve/cursos-clases-academicos/clases-particulares-a-domicilio-de.

[6] https://reactivacioneducativa.mineduc.cl/tutorias/

[7] The exception is Nicaragua.

[8] The exceptions are Colombia, Costa Rica, Cuba, El Salvador, Guatemala, Nicaragua, and Panama.

[9] PISA had subsequent iterations in 2015, 2018 and 2022, but the questions in those iterations were less useful from the perspective of this paper.

[10] In 2012, Argentina had a higher-education enrolment rate of 80% compared with 55% in the region (Cámara & Gertel, 2016, p. 136).

[11] For an update on the Colombian model with new evidence on the effectiveness of standardised test preparation programmes, see Posso et al. (2023).

[12.] While presumably most of this support was fee-charging, some may have been fee-free.

[13] Some of this tutoring may have been free of charge, but it may be assumed that most was fee-charging. Source: TIMSS and PIRLS Database, Boston College https://timssandpirls.bc.edu.

[14] https://education-profiles.org/es/america-latina-y-el-caribe/cuba/~actores-no-estatales-en-la-educacion

[15] For example, Sulz and Nogueira (2023) highlighted diversity in the operations of three tutorial centres in Belo Horizonte city, Brazil.

[16] https://www.tutoresencasa.com/, accessed 17 January 2024.

[17] https://www.superprof.cl/, accessed 17 January 2024.

[18] For more examples, see, e.g., Apprentus in Bolivia https://www.apprentus.com/, Educa+Brasil in Brazil https://www.educamaisbrasil.com.br/cursos-online/curso/tutoria-e-reforco-escolar, and Preply in Colombia https://preply.com/en/Medellin/spanish-tutors

[19] The Latin American countries where Kumon currently operates are Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Guatemala, Mexico, Panama, Peru, and Uruguay.

[20] Alongside was the SaberEs programme launched in Medellin in 2016. This was a government funded programme implemented through the private sector without charge to students. It assisted students from low socioeconomic backgrounds who were due to sit the Saber 11 examination. Evaluation stated that a reduction of 23% in the socioeconomic achievement gap was attained (Posso et al., 2023).

[21] These countries, as indicated by officials responding to a UNESCO questionnaire, are Colombia, Costa Rica, Ecuador, El Salvador, Mexico, Panama, and Uruguay. The questionnaire was for a database to support UNESCO's *Global Education Monitoring Report* on non-state actors in education (see https://education-profiles.org/themes/~non-state-actors-in-education#).

[22] Among variables to be considered in such research should be the amount of fee-free support in public schools for students lagging behind their peers and/or wishing to stretch to greater heights. The Argentinean picture might perhaps be partly explained by low provision of such support in typical schools.

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