

PRACE NAUKOWE

Uniwersytetu Ekonomicznego we Wrocławiu

RESEARCH PAPERS

of Wrocław University of Economics

Nr 406

Globalizacja – gra z dodatnim czy ujemnym wynikiem?

Redaktorzy naukowci

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Wydawnictwo Uniwersytetu Ekonomicznego we Wrocławiu
Wrocław 2015

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Wrocław 2015

ISSN 1899-3192
e-ISSN 2392-0041

ISBN 978-83-7695-543-8

Wersja pierwotna: publikacja drukowana

Zamówienia na opublikowane prace należy składać na adres:
Wydawnictwo Uniwersytetu Ekonomicznego we Wrocławiu
53-345 Wrocław, ul. Komandorska 118/120
tel./fax 71 36 80 602; e-mail: econbook@ue.wroc.pl
www.ksiegarnia.ue.wroc.pl

Druk i oprawa: TOTEM

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**PRIVATE ENGLISH TUTORING INDUSTRY IN CHINA
ON THE EXAMPLE OF THE ACTIVITY
OF NEW ORIENTAL EDUCATION
& TECHNOLOGY GROUP**

**RYNEK PRYWATNYCH KOREPETYCJI W CHINACH
NA PRZYKŁADZIE DZIAŁALNOŚCI
NEW ORIENTAL EDUCATION
& TECHNOLOGY GROUP**

DOI: 10.15611/pn.2015.406.24

JEL Classification: L20, L84

Summary: The following paper aims at showing the situation observed nowadays on the market of extracurricular educational services in China. On this example a reader can see how different it appears in comparison to European circumstances. A spectacular impression the tutoring facilities make is the source of their competitive advantage and stunning success. Also the image of a student coming from the city viewed in the article diverges significantly from what can be noticed in the Old Continent. The young Chinese appear to be very ambitious, hard-working and motivated to get best education, but on the other hand they get susceptible to any western trends.

Keywords: China, private tutoring, Ga Kao exams, cram schools, tutors.

Streszczenie: Artykuł ma na celu przedstawienie sytuacji obserwowanej obecnie na rynku pozalekcyjnych usług edukacyjnych w Chinach. Na tym przykładzie czytelnik może zobaczyć, jak różna wydaje się ona w porównaniu z europejskimi warunkami. Spektakularne wrażenie, jakie robią placówki zajmujące się korepetycjami, to źródło ich przewagi konkurencyjnej zapewniające tak oszałamiający sukces. Również obraz studenta pochodzącego z miasta przedstawiony w artykule odbiega znacznie od tego, co można zauważyć na Starym Kontynencie. Młodzi Chińczycy wydają się bardzo ambitni, pracowici i zmotywowani, aby uzyskać najlepsze wykształcenie, a z drugiej strony są oni podatni na wszelkie zachodnie trendy.

Słowa kluczowe: Chiny, prywatne korepetycje, egzaminy Ga Kao, szkoły edukacji pozalekcyjnej, korepetytorzy.

1. Introduction

“Don’t lose at the very beginning”¹ is a well-known slogan created by cram schools². The following research emerged from the urge to get to know this branch better, to deliver information to the entrepreneurs operating in that field in Poland and to create new possibilities for those who would like to take up the challenge in this uneasy environment. The observed phenomenon is the more interesting for the author that the similar situation is now being noticed in the motherland, and widely criticized. What is attempted to be explained is the issue of harmfulness of private tutoring as spoiling and disturbing the national educational system. This is to be questioned in the paper to prove the weaknesses of the above mentioned and the growing trend of using the extracurricular activities as inevitable.

In the year 2013 the *China Daily* reported that 400 million Chinese people were studying English – one-third of the country’s population. The majority of these would fall into the school age bracket. Moreover the value of the English-training market is estimated at 4.5 billion US [Tan 2011]. General data show that 72% of students in Hong Kong have a tutor.

Private tutoring in the following text refers to classes that take place outside and in addition to formal schooling, in the afternoons or evenings, at the weekends and during holidays. Private lessons in a particular subject usually take place once or twice a week. They are provided for a fee, closely following and oriented towards the school syllabus, with the goal of improving the students’ performance at school and especially the outcome of exams [Hartmann 2008].

2. Chinese social groups

Wide inequalities among certain social groups in China are easily observed in the field of education and employment. Household registration (hukou) system of China³ favors urban residents and discriminates against rural residents in resource allocation [Afridi et al. 2011]. Chinese citizens and their offsprings can be divided into three distinctive groups:

1. Big-city residents (nonagricultural) – this group of people live and act mostly under the restricted one-child regulations and thus they put a great effort of time and money into their children education. It is highly believed that English is crucial to get

¹ *Chinese measure aims at easing pressure on students*, www.upi.com; released: March 28, 2014.

² A private institution, especially in East Asia that uses an accelerated curriculum to prepare students for university entrance exams [dictionary.reference.com].

³ “For more than half a century, the hukou (household registration) system in China has segregated the rural and urban populations, initially in geographical terms, but more fundamentally in social, economic, and political terms. It is the foundation of China’s divisive dualistic socioeconomic structure and the country’s two classes of citizenship [...] To an individual, hukou status is an important ascribed attribute in determining one’s social and economic circumstances.” [Chan 2010, pp. 357-364].

into a good foreign university and get a well-paid job. That is why small fortunes are spent on child's tutoring. This group is the only one that is capable of paying for those and getting into state universities in the place of residence freely.

2. Farmers and people living in the country (agricultural) – this group covers over a half of the Chinese society but only a small percentage of children belonging to it go to study due to the very low level of education in rural areas of the country. Children from the country are not expected to fulfill more than 4 classes at school and are mostly destined to stay in the country to help their parents.

3. Immigrants – “socialist laborers” [Gruszka 2012], about 200 mln in China. These are the people who came to the coastal cities for work at the beginning of the '80s. Now the education of their children is a grand problem, because according to the Chinese law they can get it in their place of residence which very often means many hundreds kilometers away from home. Moreover they are not well-seen in local schools and thus cannot benefit from them.

Due to these country educational system problems only the group of children coming from big cities can be taken under consideration when analyzing the market of private tutoring. Educational differences, one-child policy and a high level of competitiveness as well as the tradition of valuating knowledge put a great pressure on the society willing their children to become outstanding.

3. Chinese education

Present Chinese education is the largest education system in the world. In June 2014 9.39 million students were taking the National Higher Education Entrance Examination (Gao Kao). Investment in education accounts for about 4% of total GDP in China. The premise of compulsory education laws is that requiring a basic level of education improves the well-being of individuals and society. The wage-compression policies and other institutions of the Maoist era in China suppressed returns to education [Fang 2012, p. 6]. In 1986, when Chinese government passed a compulsory education law, nine years of education became mandatory for all Chinese children. The Ministry of Education estimates that 99.7 percent of the population area of the country has managed to achieve universal nine-year basic education [*China Education...* 2014].

The standard Chinese education covers 3-year pre-school education, primary education and regular secondary education (divided into academic secondary education and specialized/vocational/technical secondary education). Higher education is optional.

In the figure it can be seen that there are 5 stages of education. The first level for children aged between three and six is kindergarten. This level is optional. The next level is primary education, which usually lasts 6 years and is for pupils aged between 6 and 12. The following level is junior secondary, which together with primary

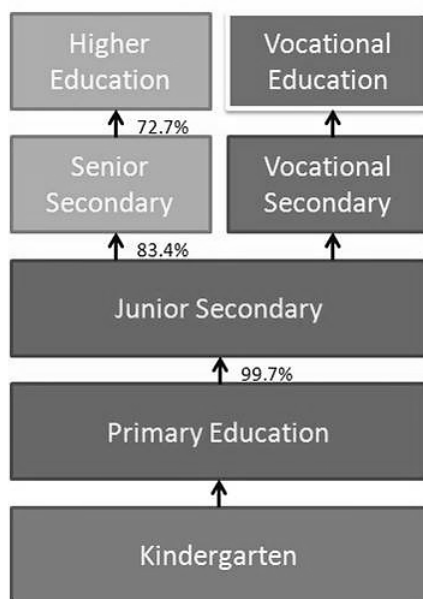


Fig. 1. The hierarchy of Chinese education system

Source: www-db.in.tum.de from 13.11.2014.

education, forms the nine-year compulsory education. Compulsory education is in principle free, although a small amount of fees is charged. After junior secondary students have two options: to attend the senior secondary and target for higher education, or to choose vocational secondary, which is usually more often chosen by the poor since the cost of vocational secondary is relatively low and a student can directly find a job right after finishing his or her education.

National Higher Education Entrance Examination is the only way for most Chinese students to get the opportunity of higher education. Thus, it is very important and can really change their life. Students in China usually take the whole year or longer to prepare for it. Every university chooses the best students in a province, based on marks. Therefore the examination is standardized in a province.

The examination normally lasts two days and consists of 4 subjects: Mathematics, Chinese, English and one optional (Physics, Chemistry, Biology, History, Geography, Politics or others). The enrolment of a university is based on total mark, which varies in different province. The gross enrolment ratio is 59.3% in 2008 (5.99 million out of 10.50 million candidates), which indicates that it is not so difficult to get higher education. However, it is extremely difficult to get in a very good university like for example Tsinghua University or Beijing University.

4. Foreign English tutors trap

The number of English-language learners in China is really vast. According to a Chinese government survey about 390 million people in China have studied English in their lives. With so many people engaged in studying this language, children are required to work hard to be more proficient and reach a competitive advantage [Bolton, Graddol 2012, pp. 3-9]. Parents believe that knowing English will help their children in their future life and career. In China under the one-child policy, many parents want to see their only children become top students and are ready to spend big money on education. Parents fill children's lives with extra classes in pursuit of top grades.

While trying to provide their children with what they think are the best resources, parents often turn to English teachers from abroad. There is a strong belief that every foreigner knows English very well thus the requirements towards tutors are not high. This can drive parents into a trap of poor qualified teachers with little or even no knowledge of the language they are hired to teach. Tutors themselves, who very often are also students, consider this type of activity a nice and simple way of earning some extra money which sometimes is quite a lot. However, it seems that foreigners accept this kind of job offers only in anticipation of a high pay.

Nevertheless parents are presented with other alternatives to ensure their children after-class education. The private education industry has taken various forms, from one-to-one tutoring to lecture-style video classes.

5. New Oriental Education & Technology Group (EDU)

Huge companies, commonly called the "Ga Kao factories" have recently gone public and are all listed on the New York Stock Exchange [www.upi.com]. The most extended one is probably New Oriental Education English school. New Oriental Education & Technology Group, Inc. offers educational services: foreign language training, test preparation courses for admissions and assessment tests in the United States, the PRC and Commonwealth countries, primary and secondary school education, development and distribution of educational content, software and other technology, and online classes [www.bloomberg.com/quote/EDU:US]. New Oriental offers a wide range of educational programs, services and products consisting primarily of English and other foreign language training, test preparation courses for major admissions and assessment tests in the United States, the PRC and Commonwealth countries, primary and secondary school education, development and distribution of educational content, software and other technology, and online education. New Oriental teaching activity mainly focuses on the English language (although not exclusively), and provides all tutoring services related to English examinations such as GRE, TOFEL, IELTS, and SAT. These are required to enter foreign universities which are becoming increasingly popular among Chinese parents.

Since New Oriental was founded in 1993 in Haidian District of Beijing, it has built 56 short-time language educational schools and 711 learning centers in 50 cities in China, 47 book stores and over 5,000 third-party bookstores, and over 16,700 teachers in 50 cities. The 2011 statistics showed that there were about 15,000,000 students who had studied in New Oriental [finance.yahoo.com/q/ks?s=EDU+Key+Statistics]. The annual enrolment of New Oriental amounted to over 2 million students. New Oriental was listed on the New York Stock Exchange on September 7th, 2006, as the first private education company in China. New Oriental's ADSs, each of which represents one common share, currently trade on the New York Stock Exchange under the symbol "EDU" [www.bloomberg.com/article/2014-09-29/a9Sdr33Xtyr8.html]. The described data are shown below in a graphic form on the map of People Republic of China to picture how widespread New Oriental subsidiaries are.

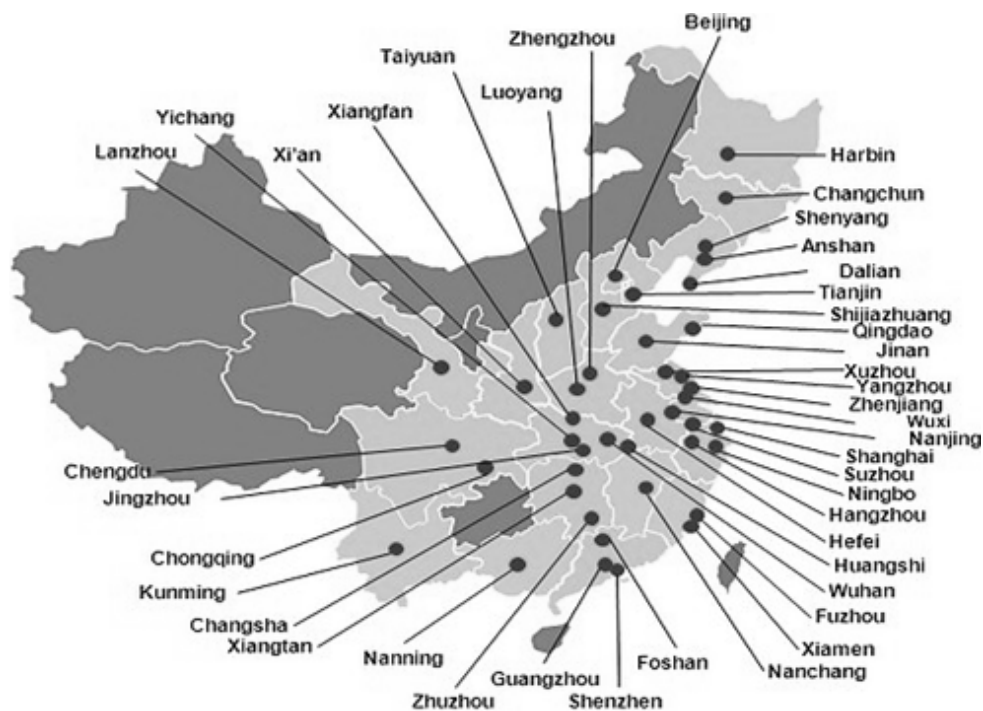


Fig. 2. Cities in China where New Oriental subsidiaries are operating

Source: www.wikinvest.com on 10.12.2014.

The official website of the company says: "The mission of New Oriental International College is to inspire students to improve their lives and expand their horizons through a lifelong commitment to learning, by empowering students to achieve their academic potential, to build self-confidence, and to develop a global

vision which embraces cultural differences and promotes cultural exchanges. New Oriental International College is committed to educating a new generation of business and community leaders with international visions” [neworientalgroup.org/new_edc/about_Mission_Statement]. It shows how deeply this company is rooted in traditional Chinese admiration and respect for education, and the modern need to become an outstanding individual and gain the best and vastest qualifications possible.

On the 30th October 2014 New Oriental announced its unaudited financial results for the fiscal quarter ended August 31, 2014, which is the first quarter of fiscal year 2015 of New Oriental. The report stands that for the first fiscal quarter of 2015, New Oriental reported net revenues of USD 394.0 million, representing a 1.4% increase year-over-year. Net revenues from educational programs and services for the first fiscal quarter were USD 361.4 million, representing a 2.3% increase year-over-year. The growth was mainly driven by an increase in average selling price. Total student enrolments in academic subjects tutoring and test preparation courses in the first fiscal quarter of 2015 decreased by 3.4% year-over-year to approximately USD 888,400.

As the report states during the last five years, the strategies of New Oriental – “Occupy the Market” and “Harvest the Market” helped the company grow and perform very well at various stages in the evolution of its business. These initiatives allowed for the aggressive growth of both revenues and profitability given well-timed strategies and areas of focus. As a result, New Oriental achieved major milestones by the end of the recently concluded fiscal year 2014, a period during which the Company achieved over USD 1.1 billion in revenue for the first time and recorded high net income of over \$215 million.

Looking to the future, it is clear that in order to optimize market opportunities and achieve sustainable and balanced growth overall, the Company must again recalibrate slightly and take certain focused steps to cultivate new driving forces for its business growth going forward. At the same time, New Oriental’s online education initiatives, which aim to establish an online and offline integrated education ecosystem, are off to a great start.

Therefore, starting in the fiscal year 2015 the Company decided to launch its new “Optimize the Market” strategy, focusing on maintaining a healthy balance between top-line and bottom-line growth as well as meeting the growing demand for online education services in China. The Company will execute new initiatives to develop both the core offline and online businesses in order to reinforce New Oriental’s strong market position, gain new market share, drive the top line, and maintain the solid margin expansion that occurred in the last fiscal year [New Oriental Announces... 2014].

6. Tutor kings and queens

Tutors employed in education centers like New Oriental are nothing like European-model private teachers. It is widely-known that in Hong Kong's consumer culture, looks sell and that is how the teacher's images are created. The new trend shows tutors as rock stars: young, attractive and successful. They appear on enormous billboards on the sides of buildings and buses. On their classes they gather huge groups (often over 100) of young people willing to pay sometimes even five times a price for the lesson with a well-known tutor.

This phenomenon is typical for Asian students nowadays. It comes from three indicators:

- the Confucian tradition, where teaching is a highly respected profession and teachers are a well-paid social group,
- Chinese admiration for eastern culture which is shown by tutor's luxurious style of clothing and sophisticated behavior,
- anticipation of brighter future achieved by education and contact with people of success.

"Tutor kings and queens" play a significant role in lifting the company's fortunes in the face of stiff competition. Their special physical charm and personally-designed test-taking techniques are New Oriental's aces in its promise to get students to come out of the NCEE exam with flying colors [Chang 2014].

7. Moral aspect of private tutoring

Despite what New Oriental's mission states tutoring indeed is a questionable issue on both, economic and educational level. Although private tutoring has become a worldwide phenomenon, it is still heatedly debated. The discussion is focused on such issues as the phenomenon of private tutoring becoming worldwide, the equity implications of private tutoring, and the professional ethics of teachers who also work as private tutors.

Most scientists call private tutoring a problem. They even recall the works of nineteenth-century authors. Whewell for example, writes: "The objection to private tuition, which principally requires [attention], is that it generates intellectual dependence and superficial knowledge, and that it interferes with public teaching" [Whewell 1837]. It is said that this kind of education gives students too much self-confidence and thus they feel no fear before important tests and exams which makes them less motivated to learn constantly. Moreover cram classes are a great burden for students under pressure of constant learning, from early in the morning till late at night, which is precisely represented by tutoring schools in China.

However, according to Global Industry Analyst, Inc. (GIA) the burgeoning private tutoring industry growth is being driven by the failure of traditional standards

of education to cater the individual needs of students and the increasing desire of parents to ensure their children best possible future in a highly competitive world economy [Crotty 2012].

8. Conclusion

In one-child-policy China there is now a very high pressure on the exam results. To stand up to these standards students as well as their parent are willing to spend the time, effort and a lot of financial sources. The only way to float onto the surface is to become an outstanding individual and get into the best universities in the country or, even better, abroad. Thus the institutions like New Oriental Education & Technology Group are going not only to be more and more popular and widespread, but flourish and trigger next one to arise.

An image of rock-star tutors they have created and are now promoting can be an inspiration to those who want to achieve success in this branch in Europe, standing out with the uniqueness and new approach to the profession. Although so far many have stated the mischievousness of private tutoring, the reality all around the world shows how popular and irreplaceable this form of side education still is. Tutoring has become the independent branch of economic activity working legally in the market and creating measurable gross revenue with an impact on the stock exchange.

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