

Edited by MARJOLEIN K. CAMPHUIJSEN, ANOUK ZUURMOND, COR VAN MONTFORT

With a foreword by PATRICIA BURCH

PUBLIC-PRIVATE ENTANGLEMENT IN EDUCATION

Mapping, Understanding, and Evaluating



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EDITED BY:

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WITH A FOREWORD BY:

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VU University Press

VU University Press
De Boelelaan 1105
1081 HV Amsterdam
The Netherlands

www.vuuniversitypress.nl
info@vuuniversitypress.nl

Cover and interior design:: Bas Smidt, 's-Gravenhage
Cover photo: Cor van Montfort

ISBN 978 90 8659 921 9
NUR 840

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Foreword by Patricia Burch

Professor USC Rossier School of Education, Los Angeles

In 2015, the private equity firm Vista Equity Partners acquired PowerSchool from Pearson. The market applauded the move, given PowerSchool's business model – cloud-based systems intended for managing student information, instruction, and assessment. As of 2026, PowerSchool had contracts with more than 75% of school districts across the United States, with revenues from these contracts totaling close to 2 trillion dollars. Vista's acquisition of PowerSchool was part of an aggressive acquisition strategy of K-12 predictive analytics in K-12 and higher education (Burch, in progress).

The market did not discuss an important component of the sale. First was the fact these systems were being used in very high-stakes decisions for students at both primary, secondary and college level – determining course placement, suspension and expulsion, access to college, and determination of degree. The second was that the program used students' race and income as predictors of their chances of success and failure. These predictors were encoded in the software despite extensive research showing disproportionate harms to students of color, and most specifically, Black boys (Bird, Castleman, & Song, 2024; Skiba, Michael, Nardo, & Peterson, 2002).

As I have argued in other work (Burch, 2021, 2023; Burch & Good, 2014), when districts rely on vendor-controlled platforms to deliver instruction, triage students, and train teachers, the core decisions that shape students' opportunities are increasingly embedded in proprietary systems that families cannot see and that public agencies themselves cannot easily reach. Earlier work on these contemporary forms of privatization has shown how hybridity and contingencies in public/private roles create structural opportunity gaps; students experience the consequences of privatized decision-making, but there is no clearly designated actor responsible for upholding their rights.

Globally, public schooling operates through and is interdependent with state platforms and data infrastructures. Once the state adopts systems, including for high-stakes tasks as in the PowerSchool example, technology's way of doing instruction, assessment, and curriculum becomes the state's way of doing these things (Williamson, 2017; Poell, Nieborg, & van Dijck, 2019). These developments are not just "more privatization"; they are reconfiguring the

governance of education and the meaning of privateness and publicness (Ball, 2012). This creates urgency for empirically grounded, richly theorized work and tools that help us describe, evaluate, and, where appropriate, resist contemporary public-private entanglement in public education.

In recent decades, scholars have advanced the field of educational privatization in important ways, analyzing, for example, the expansion of global education industries and edu-businesses, philanthropy as a privatizing agent, and the rise of new models in education such as online platforms as a new form of educational marketplace (Ball, 2009, 2012; Verger et al., 2016; Williamson, 2017). There has been necessary attention to how public-private entanglements affect public values such as equity and accountability and how they transform institutions such as ministries of education (Nambisan & Ball, 2010; Ehren and Perryman, 2016). This is all important work and helps the conversation about privatization move beyond narrow measures of effectiveness and efficiency.

However, as the editors of this very fine volume argue in their introduction, we still tend to treat “public” and “private” as binaries rather than as a set of fluid dimensions that intersect within and across organizations. In this context, we tend to attach normatively explicit labels depending on our vantage point: private as universally good or evil; public as universally good or evil. And because of this, in part, we lack a shared language for describing and analyzing contemporary forms of privatization in ways that move beyond fixed ideological positions. At exactly the right time, this volume picks up the question: “What is the nature of public-private entanglement, what exactly is happening here, and what does it mean specifically for the public, civic purposes of education?” It is work that uniquely focuses on entanglement as the object of analysis, rather than focusing on privatization as either state retreat or, alternately, as a necessary intervention into state failures. The volume approaches this task via rich empirical cases from different regions and sectors (teacher labor markets, shadow education, quasi-markets, philanthropy), all firmly grounded in a conceptual framework that helps us both describe and assess benefits and risks of hybrid forms that blend public and private in schooling.

The book makes a key contribution by breaking down publicness into multiple dimensions (e.g., funding, ownership, regulation) as opposed to grouping and overgeneralizing into one label. This allows for both more nuance and precision in comparative work, including in low- and middle-income country contexts where public/private boundaries are especially blurred. Several decades ago, organizational scholars made an argument against treating public and private as a binary. However, this volume is one of the first to give readers two connected but distinctive tools. The first is a descriptive tool for mapping how hybrid forms in schooling are formed and how they differ. The second,

which is very explicitly normative, provides essential questions for asking whether configurations serve public purposes.

The major contribution of the volume is its ability to provide us with a richly theorized but highly practical framework that synthesizes public management and education theory. Specifically, it offers new ways of describing and analyzing the publicness of educational organizations and institutions. This is important work in a post-neoliberal context in which the very idea of a public sector is under attack. The volume further extends work on hybrid arrangements so central to privatization studies – including earlier work on quasi-markets, public-private partnerships, and distributed governance. As AI becomes embedded in education systems, it redefines core values of public education – educational risk, disadvantage, democracy in education, and accountability, to name a few. The frameworks developed in this book can be instrumental in helping us both describe and keep sight of education’s unique public values at a moment when “technology on steroids” presses us to forget the human.

While the first part of the volume sets up the conceptual framework, the second part offers empirical examples as worked examples of how to use the framework. Chapters on philanthropy, state transformation, and hybrid governance provide illustrations of how private logics become contiguous with governments, agencies, and their policies. Private logics do not just exist alongside government actors; private logics make and remake these institutions. A predictive analytic system is not just purchased; it becomes and changes the criteria and rules for what we consider a successful school, student, or teacher. The chapters on markets, quasi-markets, and shadow education, and on the school improvement industry, describe in rich detail how market logics become embedded in policies around quality assurance and educational opportunity. They also reveal the larger impact of changes that start small and end up having substantive consequences downstream, altering teachers’ work and what counts as curriculum. The cases bring the framework to life through rich example and analysis. They neither villainize private involvement nor deify the public sector, insisting instead on empirical depth and conceptual sensitivity. This is exactly the kind of systematic research-praxis, multileveled approach that I have found necessary in my own research.

By the editors’ design, the book can be used by multiple audiences – graduate students, early-career researchers, practitioners and policymakers, civil-society actors and unions. In other words, it offers something for anyone engaged in debates over privatization. The book invites all of us to ask, and get answers to, some of the most pressing questions on educational privatization in the 21st century, including: “What kinds of public-private entanglements

reinforce values specific to public education, and which in contrast erode those values and trust in those institutions?”.

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Blurring Boundaries: Public-Private Entanglement in Contemporary Education

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Abstract

Contemporary developments in education indicate a profound restructuring of public education systems, where private sector logics, commercial infrastructures, and diverse forms of private sector participation become embedded within public systems. These processes have contributed to increasingly hybrid education landscapes in which public and private roles, resources, and modes of decision-making are becoming deeply intertwined, rendering the boundaries between them progressively harder to draw and prompting a rearticulation of “publicness.” These developments generate two interrelated challenges that motivated this edited volume. Analytically, there is a need for greater conceptual precision and for frameworks capable of capturing the hybrid, multidimensional, and evolving character of public-private relations, in order to facilitate both theoretical and empirical progress. Normatively, concerns arise about what may be transformed or lost as public and private roles and dynamics become more tightly interwoven, yet coherent vocabularies and normative frameworks for assessing these changes remain underdeveloped. To address these challenges, this volume advances public-private entanglement as a conceptual lens and brings together empirical and normative contributions. In doing so, the volume seeks to support more informed, conceptually grounded, and context sensitive analysis and debate about the evolving character of public education in an era of expanding public-private entanglement. Collectively, the chapters move beyond the increasingly inadequate dichotomy of “public” versus “private” and foster cross-disciplinary dialogue, culminating in two integrative frameworks – a multidimensional model and a value-assessment framework – that support more reflective, inclusive, and value-conscious deliberation about the future of public education.

Contemporary schooling is increasingly being reshaped by the growing involvement of private actors, logics, and infrastructures within public education systems (Hogan & Thompson, 2020; Verger, Fontdevila & Zancajo, 2016; Zancajo et al., 2025). These trends manifest in a wide range of developments as well as policy arrangements, including the growing role of private actors in the delivery and financing of education, and the outsourcing of a broad range of services that were once provided by the public sector (Verger et al., 2016). In many contexts, such outsourcing now includes core educational functions, such as curriculum design, standardized testing, and teacher training (Burch, 2009; 2021). These trends are also evident in the proliferation of public-private partnerships and other hybrid governance arrangements in areas such as educational infrastructure development and vocational training, as well as in the increasing alignment of public education systems with private sector logics of efficiency and performance measurement. More recently, the rapid integration of digital technologies and infrastructures has further entrenched the presence of technology companies and platform providers within core educational activities, with commercial platforms and educational technology becoming embedded in curriculum, pedagogy, assessment, and school management (Williamson & Hogan, 2020).

Taken together, these developments point to an ongoing restructuring of public education systems in which private sector logics, commercial infrastructures, and diverse forms of private sector participation become embedded within public systems. In many cases, the State does not act as a passive or retreating actor, but as a mediator, broker, or enabler of these changes (Burch, 2009; Fontdevila et al., 2025). This has resulted in an increasingly hybrid education landscape, where public and private roles, resources, and decisionmaking structures are so intertwined that the meaning of “publicness” is rearticulated (Hogan & Thomson, 2020) and the boundaries between public and private are becoming progressively harder to draw.

Against this background, a useful starting point is to distinguish between processes of privatization and processes of marketization and commercialization. In both academic literature and public debate, these concepts are often used interchangeably, and even treated as synonyms (Hogan & Thompson, 2020; Zancajo et al., 2025). However, while they are closely intertwined and can mutually reinforce one another, they refer to distinct processes, underpinned by different mechanisms and associated with different outcomes (Fontdevila et al., 2025). It is therefore important to analytically distinguish between them, as research on these phenomena requires a high degree of conceptual precision in

order to accurately capture their dynamics and effects (Fontdevila et al., 2025; Lubienski & Malin, 2025).

Privatization can be understood broadly as the increasing participation of private actors in activities and responsibilities that have traditionally been the remit of the State (Verger et al., 2016). Importantly, privatization does not necessarily entail a transfer of ownership from public to private hands. Rather, it often operates through shifts in service provision, funding arrangements, and governance, thereby reconfiguring how education is coordinated, financed, and controlled (Verger et al., 2016). Following Ball and Youdell (2008), privatization encompasses both endogenous forms – where private sector norms, techniques, and logics are imported into public education systems – and exogenous forms, which involve the direct participation of private actors, often operating on a for-profit basis, in the design, management, or delivery of education. These two modalities are closely interconnected and frequently co-exist in practice.

Marketization, in turn, refers to the wider policy environment that reconfigures education around market principles and establishes quasi-markets in education, with competition and choice as key mechanisms for coordinating educational demand and supply. Marketization can be enacted through a broad set of policy instruments, including reforms centered upon parental choice, school autonomy, decentralization, accountability, and forms of deregulation (Hogan & Thompson, 2020; Zancajo et al., 2025).

Finally, commercialization refers to the creation, marketing, and sale of educational goods and services for profit, positioning education as a site of economic exchange and value extraction (Hogan & Thompson, 2020). While not new, commercialization has intensified in scale and scope, particularly in areas such as digital technologies, assessment, professional development, and school support services (Hogan & Thompson, 2020). In practice, these processes tend to intersect and reinforce one another, contributing to increasingly complex public-private configurations.

When it comes to explaining why these trends have taken hold across diverse cultural, political, and economic contexts, scholars point to the interaction between structural and agentic, as well as global and local factors, actors and mechanisms (e.g. Verger et al., 2016). At the global level, a constellation of ideational and material forces has created fertile conditions for the expansion of privatization and market-oriented dynamics (Verger et al., 2016). On the one hand, ideational shifts have contributed to the growing legitimacy of private sector participation in education, the widespread perception of education as a consumable good, and the belief that competition, choice, and private provision can enhance quality, equity, and efficiency. On the other hand, these

normative changes are accompanied and closely tied to transformations in the global economy. In an increasingly globalized and competitive environment, education has come to be seen as a key instrument for economic growth and international competitiveness, while simultaneously emerging as a profitable (global) industry attracting corporate actors, venture capital, and impact investors (Hogan & Thompspon, 2020; Verger, Lubienski & Steiner-Khamsi, 2016). As a result, private actors and corporations have started to invest in education in unprecedented ways (Hogan & Thompson, 2020), supplying an increasingly wide range of products and services to schools, systems, and parents. The emergence of the so-called Global Education Industry has stimulated the expansion of new markets, while also consolidating corporate interests that actively seek to open and shape education markets, often exerting pressure on governments to adopt private sector-friendly policies (Verger, Lubienski & Steiner-Khamsi, 2016).

At the same time, transformations in the role of the state – including the rise of the “competition state” (Ball, 2009) – and public sector reform agendas associated with New Public Management have created conditions conducive to public-private interactions and to the expansion of private sector participation in both service delivery and policymaking (Burch, 2009; 2021; Verger et al., 2016). These dynamics are further reinforced by complex, multisector networks of influence – including multinational corporations, edu-businesses, philanthropic foundations, international organizations, think tanks, and policy entrepreneurs – which increasingly shape education agendas, circulate policy ideas, promote commercial products and services, and expand market opportunities across borders (Ball, 2012; Williamson & Hogan, 2020).

Importantly, however, while private sector involvement in education has become a global phenomenon, it does not unfold uniformly or linearly. As Verger, Fontdevila, and Zancajo (2016) emphasize, privatization emerges and evolves through interactions across scales: global ideas and policy models circulate widely, but are interpreted, adapted, or resisted by national and local actors, who retain significant agency. Moreover, institutional and context-specific drivers are also crucial for explaining why and how education privatization unfolds in particular settings (Verger et al., 2016). Consequently, the forms, trajectories, and effects of private sector involvement vary across contexts, shaped by institutional, political, and socio-economic conditions. The influence of different actors within these processes is likewise uneven and context dependent, depending in part on how states position themselves as market makers (Ball, Junemann & Santori, 2016). Finally, these processes are not static: they evolve over time, taking new forms as they are reshaped through political contestation, policy feedback, and institutional legacies (Zancajo et al., 2025).

Against this backdrop, in recent years, attention has increasingly shifted to the blurring of boundaries between “public” and “private” in education. Rather than always implying a clear shift from “public” to “private”, these developments have given rise to layered and evolving configurations where public and private elements are increasingly interwoven. As Lubienski and Malin (2025) argue, privatization in education unfolds through arrangements that generate increasingly “hybrid” forms of schooling. Contemporary education systems are therefore better understood not in binary terms, but as characterized by variable and shifting combinations of public and private elements.

The cumulative effect of these ongoing processes is a broader restructuring of the educational field, in which public and private roles, actors, and logics become deeply intertwined and increasingly difficult to disentangle. As empirical studies show, private actors and logics have become so deeply embedded within the machinery of public education – woven into its routines, infrastructures, and decision-making processes – that schools become operationally hybrid while often remaining formally “public” (Burch, 2009; 2021; Hogan & Thompson, 2020). According to Hogan and Thompson (2020), the effect of these processes is a rearticulation of publicness itself: nominally public schools generate private income streams, adopt entrepreneurial practices, rely extensively on private providers, and participate in hybrid governance arrangements that defy traditional public-private distinctions. Bulkley and Burch (2011) make a similar point, showing that outside organizations have become so closely integrated into the everyday functioning of public education that it becomes increasingly difficult to distinguish “district action” from “private action.”

These developments give rise to two interrelated challenges that motivated this edited volume. The first challenge is analytical. While concepts such as privatization and marketization capture important aspects of these transformations, they remain anchored in a state-market or public-private dichotomy that struggles to fully grasp the complexity and hybridity of contemporary arrangements. That is, education is increasingly characterized by layered configurations of organizations, financial flows and logics that combine public and private features in varying ways, rendering binary distinctions analytically insufficient (Hogan & Thompson, 2020; Waslander, 2021). At the same time, concepts such as privatization are often used loosely, without specifying the particular mechanisms, dimensions, or configurations that are being studied, which complicates efforts to assess their dynamics and effects (Fontdevila et al., 2025; Lubienski & Malin, 2025). Taken together, these insights point to the need for greater conceptual precision, as well as for analytical frameworks that are capable of capturing the hybrid, multi-dimensional, and evolving character of public-private relations in education (Gutiérrez et al., 2023; Lubienski &

Malin, 2025; Zancajo et al., 2025), so as to facilitate both theoretical and empirical progress (Fontdevila et al., 2025).

The second challenge concerns understanding what is at stake when public and private roles and dynamics become increasingly interwoven. Scholars warn that such developments may erode core public values, including student autonomy, equal educational opportunity, social cohesion, solidarity, and formative democratic aims of schooling such as citizenship formation (Hogan & Thompson, 2020). At the same time, shifts in authority and agenda-setting toward private actors raise questions about the democratic governance and public purpose of education, including the safeguarding of teacher autonomy and maintenance of equitable, collectively oriented commitments that underpin public schooling. Together, these concerns highlight the need for frameworks capable of assessing what is being transformed or lost as public and private elements and logics become more tightly interwoven. The current lack of shared language to describe and analyze hybrid practices as well as normative frameworks based on a coherent set of education related values makes it difficult to articulate, critically discuss and evaluate these evolving configurations in a coherent way. As a result, discussions of public-private involvement in education frequently become polarized, sometimes shaped more by predefined positions than by substantive deliberation and fine-grained analysis. This limits the capacity to articulate what is at stake and to imagine alternatives that move beyond the traditional state-market dichotomy.

These two challenges prompted the call for contributions to this edited volume. Understanding and evaluating the unfolding, evolution, and effects of public-private configurations requires both empirical and normative inquiry. Empirically, contemporary developments call for close examination of how public-private configurations manifest in practice: what do these constellations look like on the ground? How do public institutions, private companies, civil society actors, and educational professionals interact within such hybrid arrangements? How are these developments adopted, negotiated, transformed, or resisted in particular contexts, and how do they alter everyday educational work, including teachers' roles and identities, classroom practices, and students' experiences? Such analysis demands sensitivity to the historical, institutional, and structural conditions that shape how these arrangements emerge and evolve in particular contexts (Lubienski & Malin, 2025; Verger et al., 2016). It also requires attention to the mechanisms that generate specific forms of public-private constellations and the developmental dynamics – such as path dependencies – that influence their trajectories over time. At the same time, empirical inquiry must examine what consequences and effects these constellations produce, under what circumstances, and for whom. As Burch

(2021) argues, a central concern is whose interests and wellbeing are ultimately served or disserved by these developments.

Normatively, more sustained reflection is required on the implications of public-private interdependencies, particularly concerning the evolving meaning and safeguarding of “publicness.” A growing body of research suggests that contemporary developments may be contributing to the redefinition – or even erosion – of public goals and responsibilities in education (Burch, 2009; Miron, 2008; Säfström & Biesta, 2023). Yet despite these concerns, we lack adequate frameworks to interpret these changes and systematically evaluate their impact on the public character of education. The lack of comprehensive frameworks hampers both academic debate and policy response. Moreover, in the absence of a robust normative vocabulary and the conceptual tools needed for critical engagement, there is a risk that these shifts will continue to unfold without sufficient democratic oversight or space for meaningful societal deliberation.

To address part of the challenge at hand, this volume advances the notion of public-private entanglement as a conceptual lens. This notion emphasizes the dense, multidirectional, and not easily separable interconnections between public and private actors, logics, and resources in education. Unlike “ecosystem” metaphors, which may suggest coherence or equilibrium, entanglement foregrounds the possibility of asymmetry, tension, and uneven power relations within these configurations. It also draws attention to the notion of how public and private elements are not merely combined, but become mutually constitutive.

Importantly, public-private entanglement can manifest across multiple organizational dimensions. It can, for example, become visible in educational activities, when private tutoring services are integrated into publicly organized support structures or when curriculum materials are co-produced with commercial actors. It can emerge in funding arrangements, when philanthropic contributions, public-private partnerships, and impact-oriented investment blur the traditional association between public provision and public finance. Entanglement can also occur in governance and regulation, with private standards, accreditation bodies, and transnational policy networks increasingly influencing priorities, accountability frameworks, and definitions of educational problems and solutions. Finally, the increasing integration of digital infrastructures – platforms, data systems, and algorithmic logics provided by private companies – which has fundamentally restructured the teaching, learning, and administrative functions of educational institutions, is another example of entanglement. Here, questions of control and authority become especially salient. When schools retain control over these infrastructures, the public character of education may be reinforced, whereas when control resides

primarily with commercial actors, publicness is correspondingly reconfigured. Taken together, this conceptual lens highlights how contemporary education systems are not simply a mixture of public and private, but have become fundamentally entangled, with significant implications for how publicness is understood and governed.

The remainder of this volume builds on this conceptual starting point. By bringing together empirical and normative contributions, it seeks to support more informed, conceptually grounded, and context-sensitive analysis and debate about the evolving character of public education in an era of expanding public-private entanglement. The chapters offer empirically grounded case studies, conceptual tools, and normative perspectives that illuminate how public-private interdependencies are taking shape and what values are at stake. In doing so, diverse country contexts and institutional settings are examined, tracing multiple forms of public-private entanglement and the historical, structural, and institutional conditions under which they emerge and evolve. As such, this volume sheds light on the drivers and logics behind these developments, the actors involved, and the consequences for educational practice and policy.

Simultaneously, a central objective of this volume is to deepen understanding of what these transformations mean for the publicness of education systems: whether, how, and under what conditions educational values and societal commitments are preserved, reinterpreted, or placed under pressure as public and private elements become increasingly intertwined. Along these lines, it includes contributions from educational philosophers, who reflect on the responsibilities of educators, the “pedagogical space” of schooling, and the goals of education in light of the emerging hybridity or public-private entanglement.

In the final chapter of this edited volume (Zuurmond, van Montfort & Camphuijsen, 2026), we return to the challenges that sparked our call for contributions. Drawing on insights from the different chapters as well as scholarship in disciplines such as organizational science, public management, and educational philosophy, we develop two complementary frameworks:

- (1) A **multidimensional model** that identifies the organizational dimensions affected by public-private entanglement, and;
- (2) A **value framework** for assessing and evaluating public-private entanglement in education.

The first framework, the multidimensional model, is meant to illuminate and describe how processes of public-private entanglement reconfigure the organizational dimensions through which schools enact their publicness. Drawing on multidimensional approaches in organizational science and pub-

lic management, and using the empirically informed chapters of this volume as illustrations, the model identifies which dimensions are being affected, stretched or reconfigured. The model thereby offers a conceptual tool for understanding schools as hybrid, entangled organizations.

The second model, the value assessment framework, is based on the premise that evaluating public-private entanglement requires clarity about the values at stake. Drawing on educational philosophy and pedagogical sciences, we argue that assessments must consider at least four types of values: intrinsic, educational, legal and governance values. These values are mapped within a framework designed to support systematic normative and empirical analysis of specific public-private constellations. We then illustrate the use of this framework by applying it to one of the cases in this volume. Beyond informing normative debate, the framework also serves to guide future empirical research by clarifying which values may be strengthened or jeopardized by particular configurations of entanglement.

As a whole, the volume aims to contribute to research on privatization and public-private hybridization in education in three principal ways. First, it moves beyond the increasingly inadequate dichotomy of “public” versus “private.” The contributions analyze how public and private elements intersect, overlap, and coproduce the realities of schooling, offering empirically grounded insights into the organizational, political, and infrastructural complexity of public-private entanglement. This shifts the field from thinking in binaries to examining the patterned interdependencies that shape educational practice.

Second, the volume responds to calls for cross-fertilization of disciplines (e.g., Zancajo et al., 2025). Although phenomena such as privatization have long been studied across multiple fields, interdisciplinary engagement has often been limited, with research communities operating in relative isolation (Fontdevila et al., 2025). By bringing together a multidisciplinary set of perspectives – drawing from disciplines such as sociology, economics, public administration, educational sciences, and philosophy of education – the volume illuminates the political, institutional, and normative mechanisms through which entanglement unfolds. It also highlights how combining insights from different theoretical and analytical frameworks and traditions – such as dimensional frameworks from public administration, sociological perspectives on institutional dynamics, and normative frameworks from philosophy of education – can deepen understanding of how these processes unfold and evolve, which organizational dimensions they affect, their underlying drivers and mechanisms, and their broader implications. This multidisciplinary grounding thereby broadens the theoretical and methodological repertoire available

for analyzing contemporary educational change, illustrating the potential of cross-fertilization to generate richer and more nuanced analyses of the complexities of contemporary education.

Third, the concluding chapter synthesizes these insights into a set of two overarching frameworks: a multidimensional model and a value assessment framework. By combining these two frameworks, it provides an integrated analytical and normative vocabulary for studying public-private entanglement. The multidimensional model clarifies which organizational dimensions are reconfigured under entanglement, while the value framework helps assess what is at stake for educational aims and public values. Together, they support more reflective, inclusive, and value-conscious deliberation about the future of public education.

Structure of the Volume

The volume is structured as follows. It opens with a conceptual and normative chapter that sets the stage for thinking about education as having a specific role in our society. In this chapter, Julien Kloeg argues that the sphere of schooling is interspersed with other political, economic and technological spheres, illustrating from a philosophical point of view how we might conceptualize and problematize a key notion in this volume, namely that of “entanglement.”

This chapter is followed by a series of empirically grounded chapters, each analyzing a specific form of public-private entanglement within a particular regulatory or institutional context, or set of contexts. These chapters not only document the hybrid configurations emerging across systems but also analyze the mechanisms and contextual conditions through which they are produced and sustained. Taken together, they show that the boundaries between “public” and “private” in education are increasingly blurred and that this blurring assumes different shapes across different settings. Moreover, they reveal how entanglements may result from deliberate policy choices, but also emerge more subtly through everyday practices, shifting norms, and infrastructural dependencies.

The empirical chapters are followed by another normative contribution, which is based on the premise that, rather than assuming that all public-private arrangements are either inherently good or bad, it is fruitful to examine and assess specific configurations through the lens of educational, juridical and governance values. Finally, in the concluding chapter, we synthesize the volume’s insights, develop and apply the two frameworks and reflect on their

broader implications. Below, we introduce the different chapters in further detail.

Chapter Contributions

In the first chapter, Julian Kloeg challenges the long-standing tendency to treat education as a self-contained or closed system. Education is now deeply entangled with broader societal, political, and economic forces. It is shaped not only by public policy but also by commercial actors, technological infrastructures, and political discourse. Drawing in the chapter on a philosophical perspective inspired by the work of Hannah Arendt, Kloeg maintains that while education can no longer be understood as a separate or protected sphere, it is still essential to resist its domination by either private market forces or political agendas, thereby introducing a key tension that runs throughout the volume: the need to acknowledge education's embeddedness in wider systems, while also safeguarding its normative and democratic responsibilities.

The contribution of Kloeg is followed by a chapter by Lilach Litor, who examines the rise of hybrid governance in education, where the direct provision of public schooling by state authorities increasingly gives way to complex arrangements involving private corporations, NGOs, and public-private partnerships. Such shifts raise critical concerns about the preservation of human rights, public law norms, and core public values amid growing public-private entanglement. Drawing on socio-legal perspectives, Litor conceptualizes publicness in education by exploring how hybrid governance challenges traditional understandings of public responsibility. Through a comparative analysis of American and Israeli education systems, the author investigates diverse approaches to applying constitutional rights and public law norms within privatized educational settings. A key contribution of the chapter is a novel typology of private actors in education, categorizing different forms of privatized organizations according to their varying degrees of publicness. This typology advances the volume's broader inquiry into the evolving boundaries between public and private sectors in education, offering insights into how legal frameworks shape, and are shaped by, hybrid governance arrangements.

The subsequent chapter by Mauro Moschetti, Edgar Quilabert, Alejandro Caravaca, Patricia Grillet, Rodolfo Elías, and Brent Edwards Jr. explores the intersection of privatization and state transformation in the context of Paraguay's education system. Using the theoretical lenses of dimensional publicness and neoliberal bureaucratization, the chapter challenges the notion that privatization simply entails a retreat of the state. Instead, the chapter

shows how governance is being reconfigured in ways that embed private norms and logics within public institutions. Focusing on hybrid governance structures such as the Fund for Educational and Research Excellence (FEEI) and the Programs and Projects Executing Unit (UEPP), the chapter examines how historical authoritarian legacies and institutional inertia shape contemporary public-private dynamics. Drawing on interviews with key stakeholders and extensive document analysis, the authors illustrate how neoliberal bureaucratic mechanisms have redefined public values such as equity, accountability, and inclusion. By foregrounding the role of political and historical context, the chapter provides a nuanced account of privatization and public-private entanglement as a process of state transformation, thereby contributing to a more complex and grounded understanding of publicness in education.

This chapter is followed by a contribution by Cristóbal Villalobos, Lluís Parcerisa, Sebastián Pereira, Macarena Hernández and José Miguel Fuentes. In their chapter, the authors examine the global influence of philanthropic foundations in education, with a focus on how their activities contribute to new forms of policy privatization and the blurring of public-private boundaries. While existing literature has extensively documented edu-philanthropy in Global North contexts, this chapter addresses a significant gap by theorizing philanthropic influence through a global lens. Drawing on a comprehensive scoping review of 162 academic publications (2000–2024), the chapter challenges Northern-centric assumptions and incorporates evidence from underrepresented regions, particularly the Global South. It identifies the globalizing strategies of “new philanthropy”, such as funding research, shaping public discourse, and building cross-sectoral networks, that promote market-based ideas like standardization and accountability. The analysis conceptualizes philanthropy as a “double privatizing agent”, simultaneously eroding public-private distinctions and enabling broader private sector involvement. Furthermore, the chapter shows how philanthropic roles differ across political-administrative regimes: Anglo-American contexts prioritize structural reform, while in Global South settings, philanthropy often acts as a critical partner that fills gaps in state capacity through public-private partnerships. By developing a comparative and theory-driven account, this chapter advances our understanding of the transnational reconfiguration of education governance and the strategic role of philanthropic actors within it.

The next chapter, by Virginie März, Maarten Simons and Mieke Berghmans, explores the growing marketization of school improvement support, often referred to as the “school improvement industry,” within the context of neoliberal education reforms. As governments embrace market mechanisms and emphasize performativity, education systems have increasingly opened

up to private for-profit and non-profit actors that provide schools with training, resources, and advisory services. The authors examine this phenomenon in Flanders (Belgium), where this development has resulted in a complex ecosystem where traditional public pedagogical advisory services now coexist – and compete – with a rising number of commercial actors, freelancers, and “entrepreneurial” consultants. Through an exploratory empirical study involving key stakeholders in the Flemish school improvement ecosystem, the chapter examines how these diverse actors position themselves and interact amidst shifting policy landscapes that emphasize school autonomy and performance. Using positioning theory, the authors critically examine the implications of liberalizing the school improvement sector for the roles of different providers and the challenges this poses for schools. By offering theoretical insights and empirical evidence that moves beyond dominant Anglo-American settings, this chapter contributes to understanding how the interplay between traditional and market-driven actors reshapes school improvement practices, and raises important questions about equity, publicness, and governance in contemporary education.

The following chapter, by Tijana Prokic-Breuer, Ilja Cornelisz and Geertje van Bergen, offers a detailed analysis of public-private entanglement in the Dutch education system, with a specific focus on the quasi-market for teaching and learning interventions in language and literacy. Using Levin’s (2002) framework for analyzing quasi-markets in education, the chapter examines how private providers participate in the development and distribution of instructional resources aimed at addressing language delays. It focuses on three key design instruments of quasi-markets: finance, regulation, and support services, and investigates how these influence core educational outcomes, including freedom of choice, productive efficiency, equity, and social cohesion. What emerges is a nuanced portrait of a market where policy principles of autonomy and choice have enabled a broad and diversified supply of interventions, but where quality assurance mechanisms remain fragmented and inconsistent. The chapter reveals that socioeconomic disparities play a growing role in shaping access to remedial programs and learning materials, raising questions about the equity and effectiveness of the current system. Moreover, it shows how schools’ autonomy in selecting programs can lead to non-evidence-based practices, especially in the absence of robust evaluation frameworks. The Dutch case also illustrates how entanglement between public and private sectors is produced not only through formal partnerships or outsourcing but also through a more diffuse interplay of policy design, market conditions, and institutional logics. As such, this chapter provides a compelling example of how quasi-markets operate in practice, and how their outcomes are shaped by

the specific institutional architecture in which public and private actors are embedded.

The subsequent chapter by Nynke Douma, Anouk Zuurmond and Matthijs Warrens explores the evolving relationship between supplementary education and the publicness of Dutch secondary education, focusing on how private supplemental and shadow education practices are reshaping core educational values. Using the Dutch Education Council's framework for publicness as an analytical lens, the chapter investigates how educational professionals perceive the place, role, and impact of supplementary education within Dutch secondary schools. The analysis addresses key dimensions of publicness, including quality, accessibility, equality of opportunity, and teacher involvement, and reveals a complex and sometimes contradictory landscape. While supplementary education is often viewed as supporting economic outcomes and broadening educational offerings, concerns emerge around its effects on equity, teacher participation, and consistent quality assurance. Shadow education, in particular, raises questions about accessibility and equality, highlighting the tensions between private supplemental services and public educational goals. By foregrounding the perspectives of teachers and policy professionals, this chapter illuminates the nuanced interplay of public and private spheres within Dutch education, showing that supplementary education both mirrors and influences public schooling practices. This examination contributes to broader discussions in the volume regarding the multifaceted nature of public-private entanglements and the challenges they pose to preserving the public mission of education amid growing privatization and marketization trends.

The final chapter in this empirical part, written by Angela Cox and Ellen Goldring, examines public-private entanglement in the context of teacher labor markets in the United States, focusing specifically on the rise of alternative contracting arrangements such as fixed-term and temporary teaching positions. This is a topical issue in the current climate where widespread teacher shortages, declining enrollment in traditional teacher preparation programs, and increased competition from private and charter schools – factors that are reshaping workforce dynamics and employment practices across public education – are a major concern. Drawing on empirical data, the chapter analyzes how alternative contracts differ from traditional permanent tenured positions in terms of teacher demographics, job satisfaction, self-efficacy, and career intentions. The chapter shows that teachers on temporary contracts tend to be younger and less experienced, and often report lower job satisfaction and self-efficacy, suggesting significant workforce and equity implications.

The empirical contributions are followed by another normative contribution, by Anders Schinkel, who argues that the view of education solely as a

public good, commonly framed as necessary during the post-war expansion of the welfare state, is no longer sufficient. Instead, he proposes that we should understand education as a matter of public concern. In his chapter, he outlines key reasons for why education matters publicly and uses these to assess which forms of privatization or public-private entanglement are problematic and which might be acceptable or even desirable. The chapter also considers when forms of publicness themselves may be inadequate, and where private involvement could potentially play a constructive role. The aim is not to defend privatization, but to move beyond rigid dichotomies and develop a more nuanced evaluative framework.

As outlined above, in the final chapter by Anouk Zuurmond, Cor van Montfort and Marjolein Camphuijsen, we synthesize the conceptual insights and empirical findings presented throughout the book and revisit the twofold challenge that practices of entanglement in education pose: the analytical challenge to understand and the normative challenge to evaluate these emerging reconfigurations. Applying insights from organizational science and public management, we propose that the terms “public” and “private” refer to different organizational dimensions – such as funding, regulation, authority or activities – which together form a specific public-private profile for any institute, including schools. To plot these different dimensions that constitute a public-private profile, we present a multidimensional model to unpack and analyze public-private entanglement in education. To facilitate the evaluation of these practices, we present a value framework for evaluating public-private entanglement in education, grounded in educational philosophy and pedagogical thinking, in which we discern intrinsic, educational, legal, and governance values.

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1 Entangled Education with and against Arendt: From the Human Condition to the Pedagogical Reduction

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Abstract

Education cannot claim to be wholly independent from both private and public interest, as an overly literal reading of educational autonomy might seem to require. While complete autonomy was possibly never a live option, education today is contextualized, willingly or not, by its participation in commercial IT edtech systems, the ubiquity in many types of education of large language models under the sign of artificial intelligence, political contestation of curricula and more general worries about indoctrination, among other contexts of entanglement. In this contribution, I argue from an Arendt-inspired philosophical perspective that we cannot see education as a separate sphere, but that it is still important to insist that it should not be dominated by private, public-political, or societal interests. Hannah Arendt's political-theoretical and educational work is an insightful but also misguided account, which I here aim to develop as a point of reference for thinking anew about education in relation to private-public hybridity today.

1.1 Introduction

The private-public entanglements of education today express themselves in many different ways, which vary from place to place (Moschetti et al., 2024) but have general characteristics in common (Santalova & Pöder, 2024). Two parallel challenges confront our very conception of education. The first is how to respond to the onset of new technologies in the form of large

language models; the second is how to respond to the specter of indoctrination and more generally the political or apolitical nature of education. In both cases, there are good arguments for wanting to retain a relative autonomy for education. However, this does not mean that our aim should be to keep education free of politics, or that technology should be excised from the classroom. I here argue that education should in fact be where outside forces meet, so that the question shifts to how this can be done without succumbing and self-reducing to one such force. The theoretical background of this contribution is Hannah Arendt's philosophy of education, which on its own terms provides a strong and principled argument for keeping politics out of education – but which I extend in order to bring out the tensions inherent in education, which should both invite the world in and find its own place to stand. This is what I propose to introduce by way of the concept of pedagogical reduction. But first, let us gain a more general understanding of the problem to which this is supposed to be a response.

Recently commercial educational technology has grown to unprecedented prominence, which has only been intensified by the rise of large linguistic models that has itself shaken up many societal domains, education included. Whereas traditionally technologies in education functioned within individual classrooms, we are currently increasingly confronted with a situation where education for all intents and purposes takes place on commercially constructed dashboards, especially within higher education (Masschelein & Simons, 2018). Immediately education is faced with dilemmas about how data from student essays are incorporated into global databases and potentially made into training material for large language models, effectively turning student work into data for further software to be sold to universities. The ramifications do not end there by any means: assignments at many levels of education now have to be “AI-proofed,” which in effect means that assignment criteria have to be aligned with the possibilities and impossibilities of “AI trackers” that are themselves involved in an arms race with the commercial entities behind large language models – an arms race which is bound to be expensive and which is bound to factor into the costs faced by educational institutions for the ability to use dashboard, models, and trackers that are up to the task. Clearly other factors will be involved in this development, including the technological and financial limits of the large language models that we are familiar with today, and their cousins. But lacking such limits, it seems that educational technology in this more recent sense will increasingly transform education into the production of data that both sides of the arms race will want to invest in.

Closely related to such technological “scaffolding” of education but different in its emphasis is the more directly political set of questions concerning

education. Here of course there are real problems concerning differences between different regions when it comes to the quality and availability of and access to education, both on national and international levels. We can draw immediate parallels between technology and politics, for instance by pointing out the discriminatory biases inherent in large language models and, on a lower level of abstraction, findings of the relatively high susceptibility of non-native English speakers to an “AI-generated” verdict by trackers. But our time also brings into focus direct political involvement in education. The previous president of Brazil announced that he would remove the influence of critical pedagogue Paulo Freire with a flamethrower; the current president of Argentina campaigned on the promise of abolishing many ministries, with strong references to the ministry of education; in the American state of Florida, books were removed from schools because of their supposedly ideological nature. These political interventions in education are themselves aimed against perceived pre-existing perversions of education under the name of indoctrination. In practice this often means that when the spirit of “indoctrination” has been invoked, there is agreement that undue political influencing of education is afoot: however, the parties differ in their diagnosis of where the indoctrination is taking place. Either it is in the initial situation, or it is in its transformation.

These are all large-scale developments, both stretching across borders and providing new fuel for contestation in national political arenas. This is not in itself new: in the philosophical tradition Plato famously advocated against certain (e.g., musical) educational practices based on an understanding of what true justice would require. However, in contemporary educational thought this kind of mobilization of education is commonly viewed as a problem. Indeed, to the extent that we want to differentiate between education on the one hand and training, *dressage*, or indeed indoctrination on the other hand, it seems that we require an argument to the effect that education is not simply or only an extension of either the demands of giant tech companies or the political program of whichever ideology happens to be in power at the moment. In the 20th century this matter was for instance discussed in terms of relative autonomy (Fritzell, 1987), in terms of the difference between “institutional time” and the time of emancipation (Rancière et al., 2023) and in terms of the school as a radical potential that is precisely for that reason co-opted (Masschelein & Simons 2013, p. 16). I here want to shift the terms of the theoretical discussion by not presupposing that education is the place in which outside forces are indeed outside and can be kept at a distance, so that the (relative) autonomy of education is safeguarded. My alternative, as hinted at briefly above, is to see education as caught in the conflict between different “outside” forces, which are in fact part and parcel of education. This is especially meaningful in the context of the

private-public entanglement of education today. Rather than giving up on the ideals of autonomy in education, we should ask how we can make them more specific to the contexts of entanglement that education finds itself in today. I here attempt to answer this question by developing positions that are original with Hannah Arendt in her essay *The Crisis in Education* (1961). While Arendt herself would subscribe to a strong version of educational autonomy, I think she also offers the conceptual resources to place education “in-between private and public” – not because education can remove itself from either private or public interest, but because in education both sets of interests are present without simply imposing itself (Kloeg, 2022). I here develop Arendt’s position in the context of her work in political theory as well as the two essays she dedicated to education. At the same time, my interpretation of Arendt from an educational point of view turns against fundamental aspects of Arendt’s position. Once Arendt’s position is developed in this direction, we can ask what allows or would allow education to resist such imposition in today’s multiple contexts of entanglement.

1.2 Arendt on *The Human Condition*

A common idea in scholarship building on Arendt is to think “with and against Arendt” (Lefort, 2002; Benhabib, 2003). This holds true in her educational thought as well. One possible explanation of the prevalence of the with-and-against in that context is that Arendt in the first instance is attentive to many of the tensions that arise in attempting to situate education with respect to the different spheres or domains that exist within her societal analysis (Arendt, 2003) and is a perceptive critic of both the politicization of education as well as the dangers inherent in an educational disconnect from the world at large. In that formulation itself a tension begins to come to the fore: education should both be at a sufficient distance from, in this case, political-public concerns, without for that reason becoming a reality onto itself. Among the other tensions that are foregrounded by Arendt is the tension between the necessarily “old” world and the radically new that is manifested in students and pupils (Arendt, 1961, p. 193), which is connected to the more general tension between past and future and the more specific one between conservation and renewal – as well as a series of other tensions. So much for the first instance. In some respects, there is a countervailing tendency in Arendt’s thought, which is to respond to these tensions by containing it within its proper bounds. In order to understand this “meta-tension” between specifically educational tensions and their resolution, I have to contextualize

Arendt's philosophy of education in terms of the twin essays she wrote specifically to address the private and public dimensions of education, or rather its characterization as "in-between private and public" (Duarte, 2010; Kloeg, 2022).

Arendt's essays on education are fruits of the same period as *The Human Condition* (1958/1998), which is one of her key works. It seeks to depart from what she sees as the classical philosophical approach to characterizing human existence, namely as a "nature" that expresses a general truth in which all of humankind would be held to participate (Arendt, 1998, pp. 9-10). For Arendt, philosophical insistence on a static human nature goes hand in hand with a notion of eternity as the ultimate ideal (Arendt, 1998, pp. 20-21). Combining these two, the way in which we grasp the eternal truth of static human nature is by pursuing the contemplative life, *vita contemplative* (Arendt, 1998, p. 21). Withdrawn from the messiness of the world, the philosopher (indeed a unitary figure) arrives at timeless truths which unveil the hidden essence of man. Arendt distances herself from all of these elements. Human existence should not be characterized in terms of a static nature, but in terms of a more dynamic condition that involves human beings both in terms of being shaped by and themselves actively shaping the multiple conditions of their existence (Arendt, 1998, p. 9). This means that eternity in the sense of timelessness is not on offer: rather than dreaming of an existence outside of time, human beings should strive to persist within time, which Arendt terms "immortality" (Arendt, 1998, pp. 18-19). The kind of life we pursue here (indeed a plural undertaking) is the political life, *vita activa*. The intervention that launches *The Human Condition* can thus be understood in terms of Arendt's aim to displace the static, unitary, aloof, and intellectual dimensions of philosophy as she saw it with the dynamic, plural, engaged, and active undertaking of political activity (and political theory, which was Arendt's own disciplinary identity, connected with the aim to "think what we are doing" (Arendt, 1998, p. 5).

From this initial intervention Arendt develops a phenomenology of the different types of activity through which the interrelation of human beings, in the plural, with their environment and their condition as a whole can be understood. This is the well-known tripartition in terms of labor, work, and action. Labor is a self-sustaining type of activity which invokes human beings as *animal laborans* (Arendt, 1998, p. 22), which is necessarily circular because the activity itself consumes what it produces in the service of the natural necessity we face (Arendt, 1998, p. 99, n. 34). Think here for instance of eating food: in growing and consuming food we shape our environment and how we are placed in relation to it in specific ways. But in a more pedagogical sense, think also of raising children, which for Arendt falls into the same category. Indeed,

one of the persisting criticisms of her work by feminist scholars (see, e.g., the contributions to Honig, 2010), which share in the tradition of reading with and against Arendt, is that she systematically relegates “house work” to labor, which in some sense seems to place it at the “lowest rung” of human activity and to remove it as far as possible from the more “male-coded” sphere of political action. Moving on from labor, the next rung of the ladder is what Arendt calls “work”. Here a further distinction becomes relevant, namely that between the material earth, in which our laboring activity is situated, and the specifically human sphere of activity and artefacts Arendt calls “the world” (Arendt, 1998, p. 2). We can think of a shared symbolic space, comprising for instance linguistic meanings, musical culture and political institutions – but this is also materialized in artifacts produced by craftspeople. Accordingly, here human beings are invoked as *homo faber* (Arendt, 1998, pp. 153-159). We have arrived at a specifically human set of activities, though we are still concerned with “mankind” at large, as a more restricted but still generic conception of the subject that undertakes the activity. Work is also subject to a different kind of necessity than labor: not natural necessity, but a type of means-ends rationality which does not end in the consumption of a product but rather in the production of something which did not pre-exist that activity, and which then comes to situate further human activity as part of the world – Arendt’s own example being “a table” (Arendt, 1998, p. 52) which gathers different people together while at the same time assigning them their own place. We can thus say that work is linear rather than circular. For Arendt the importance of the world is central to education: it is “world” in this sense that is at stake in the aforementioned tensions and the overall goal of her educational essays can be described in terms of introducing newcomers to the world (Arendt, 1961, pp. 185, 193). The third and final type of human activity that Arendt describes is political action, which is the activity of beginning anew. Here we are not concerned with producing something within the world, but with applying a new direction to it – in this sense the world is necessarily presupposed in action. The clearest example is a political speech which changes the course of society. There is nothing either generic or necessary about the subject of this type of activity: in action, a “who” rather than a “what” is at stake – that it, an individual in the truest sense of the word, who stands for something and is bringing something unforeseen into the world as it had existed previously (Arendt, 1998, pp. 178-180). This does not serve either a given natural necessity or productive end defined in advance of the activity and serving as its external yardstick. In this sense action is also the sphere of freedom, which is to be conceived not internally as a kind of sovereignty of the mind, but rather in political terms as taking place in the worldly spaces that interconnect human beings. In this sense action is both the most

individual activity and one in which the plurality inherent in human existence clearly shines through: here it matters that “it is not Man but men who inhabit the earth” (Arendt, 1998, p. 234). For Arendt, action is constitutive of the public sphere: one of the failures of her times, both in consumer society and in totalitarian regimes, was that as subjects we often fall short of the political nature of action, for instance when we see the good life in terms of our productivity or some set of goods to consume, or when we see politics as a means to produce or “fabricate” a specific end-goal already predetermined in advance of the activity.

Bearing these warnings against the reduction of political existence in mind, it seems only too natural to understand education as a type of action, or at least as related to action. But in fact, in Arendt’s own writings on education, her main point is to separate education from “the public-political sphere” in a decisive and principled way. This is more complicated than it may at first appear. One might say that the point of education for Arendt is preparation, which suggests what can be described critically as her “developmental” view of education (Biesta, 2010) according to which one needs to be “enlightened” first, so that one gains access to the world in the first place, in order to then have the ability to bring something new into that world through one’s action. But education itself should not be political: for that would mean to fall into a similar trap as seeing politics itself as “fabrication,” since here too we would be defining an ideal in advance and then imposing that upon education. This could for instance take the shape of a conservative or progressive societal ideal, with education cast in the role of a means to this end: a way to bring about one’s favorite societal ideal. But rather than expressing the “new” that each human being can bring into the world, this type of education would imply “striking from the newcomers’ hands their own chance at the new” (Arendt, 1961, p. 177). Rather than bringing about any specific future scenario, any specific renewal of the world, education should keep open the chance for its renewal, precisely by means of conservation. This should not be confused with political conservatism, which would again take a specific (in this case, past-present) societal ideal and “reify” it as the end-goal of education, thereby transmogrifying education itself into a kind of production of said ideal. Rather, education for Arendt is conservative in the sense that it does not seek to renew the world, but to describe it, so that students qua newcomers can be introduced into it, which in turn will enable them to renew it on their own terms once they are full (which also means, educated) political subjects both connected to the world and with their capacity for the new intact.

This capacity for the new, much like the fact of our “earthliness” (human beings exist on the earth) and our mortality (human beings will die one day) is one of the fundamental human conditions that Arendt analyzes. Our capac-

ity for the new she calls “natality” to reflect that with each birth a new human being is brought into the world: action is therefore understood as a kind of “second birth,” in which we actualize our capacity for the new and ourselves bring something new into the world (Arendt, 1998, p. 176). It is important to add here that action is not the sole proprietor of natality – though it is its fullest expression – but Arendt adds that in all human activities, including labor and work, something new is brought into the world. It is this capacity that for Arendt should situate our approach to education: as she puts it, “the essence of education is natality” (Arendt, 1961, p. 174).

1.3 Thinking Education against Arendt

In a constructive vein I think much of this analysis is uniquely rich when it comes to describing and situating education, especially with regard to its tension-filled relationship with both the public and the private sphere, which is my direct concern here. Other strong aspects of my analysis are the underlying account of human activity and how that account is committed to the individual subject, plurality, and worldliness, all of which merit further discussion. Education is in some sense caught in-between old and new, past and future, conservation and renewal on Arendt’s view, which enables her to take a principled distance from both the politicization of education, which would make it subservient to public-political ends, and also places it at a distance from the private sphere in terms of home life. But for Arendt herself this comes at the price of having to situate education someplace else, namely in a further sphere that stands apart from private and public. This third sphere is what Arendt calls “society.” In *The Human Condition*, Arendt sees society as a typically modern phenomenon that brings with it the threat of conformity and the displacement of our activity. This concept has been critically received on the whole: Hannah Pitkin named her book *The Attack of the Blob* (2021) against Arendt’s conception of the social, which seems to be an overly generic explanation of what Arendt views as the ills of modernity. But this sphere of society is exactly where Arendt places education in her first essay on education, “Reflections on Little Rock.” I now turn briefly to Arendt’s account of education there in order to set up an argument that extends Arendt’s emphasis on in-betweenness and tension to both of her own educational writings.

The title of the above-mentioned essay refers to Little Rock (Arkansas) in the United States, the country Arendt arrived in after fleeing first her native Germany and then France in the dark times that preceded the outbreak of the Second World War. Little Rock had resisted the 1954 Supreme Court ruling

which declared that “separate but equal” schools for different races (segregated schools) were unconstitutional. In September 1957, nine African American students – the Little Rock Nine – attempted to attend the previously all-white Central High School, but the Arkansas Governor mobilized the National Guard to block their entry, defying federal desegregation orders. Many local residents and would-be classmates were equally intent on keeping the Nine out of the school. This prompted President Dwight D. Eisenhower to federalize the Guard and dispatch U.S. Army troops to enforce the Supreme Court ruling. Arendt’s “Reflections on Little Rock” can be interpreted as a polemic against the forced desegregation of schools in the American South and a “political exercise” (Robaszkiewicz & Weinman, 2023; Robaszkiewicz, 2016). It highlights the idea that engaging in the public sphere – whether through writing or speaking – is a form of situated judgment that is necessary yet inherently risky. Arendt’s essay was highly controversial and “scandalous” upon its publication in the 1959 issue of the left-wing magazine *Dissent* and was preceded by an editorial statement apologizing for its content. Arendt herself later retraced her position in part in dialogue with the influential black American author Ralph Ellison (see Allen, 2005). Decades later we might be even more inclined to oppose Arendt when it comes to such matters. But before jumping to conclusions, we should consider that Arendt’s argument turns on a particular version of her distinction between three societal spheres: the private sphere, which is characterized by the principle of purely individual acts of love that conjoin persons to each other; the public sphere, which is governed by the principle of equality; and, interposing the two, the societal sphere, which is governed by the principle of discrimination (Arendt, 2003, p. 205). By this Arendt does not mean discrimination *against*, but rather the distinction that in the private and social realms individuals must have the freedom to choose with whom they interact or associate. These are decisions we should be able to make as actors within what might be called “civil society” in a different vocabulary. Hotels should be allowed to cater exclusively to a specific type of clientele: that is their decision in a similar sense (Arendt, 2003, p. 206). Considerations of equality have no place here, according to Arendt: it is not for government to force the hand of civil society, except where this impacts access to the public sphere as such. Arendt’s examples of the latter are public transport (Arendt, 2003, p. 207), where she seems to be thinking about Rosa Parks, whose refusal to sit at the back of the bus had sparked controversy only a few years earlier, and hotels situated in a business district (Arendt, 2003, p. 207). I have argued elsewhere that schools seem to fit this bill better than any hotel, regardless of location: schools seem to impact access to the public sphere as such in a much more fundamental way (Kloeg, 2022), especially if we see education in the terms Arendt

would propose slightly later and in part in response to her critics. This second essay, “The Crisis in Education,” argues for the importance of establishing a connection between world and newcomer in the sense that we have already discussed at length. If we are indeed committed to introducing all newcomers into the world, which is the condition for their subsequent ability to act as full political subjects, then schools seem to occupy a both unique and crucial position, which Arendt does not fully recognize in her earlier “Reflections on Little Rock” essay. However, her point that education should be positioned at a remove from the private sphere and the public sphere, which is central to both essays, still seems to stand, even though the societal sphere does not provide a clear home for it either.

This is where I begin to think “against Arendt” – not just in terms of being critical of her position, but in seeing her educational thought as pointing in a different direction than where she herself ended up. Arendt’s characterization of education as standing apart from the private and public sphere is correct, though not in the sense that education could be separated from private and public interests. If we were to read her in the sense that education should be strictly separated from both sets of interests, then the present situation in which there are multiple contexts of entanglement would render her educational thinking obsolete or at best inspire us with a kind of nostalgia for the “separateness” of earlier education that seems to run counter to the worldly aspirations of Arendt’s educational theorizing or, for that matter, her work as a whole. I here propose to take the opposite approach: rather than approaching education with a predetermined notion of how it should be free from private and public interests alike, we should “think what we are doing” (Arendt, 1998, p. 5). This does not only apply to the contexts of entanglement in our own time, whether technological or political in nature, but also to the politicization of education that Arendt herself was so actively opposed to. To the extent that my earlier analysis on the public importance of schools is valid, public interests structure the activity of schools as such. This is borne out by Arendt’s insistence on the responsibility of educators, which is geared towards the maintenance and renewal of the world, which is the precondition for any kind of political action.

Of course, we do need to distinguish between education as such taking place in service of the world and specific political doctrines entering into education and dictating its shape. Here Arendt’s own work bears out precisely this distinction. We need to introduce newcomers to the world as it exists: but whenever we are seeking to shape newcomers into the loyal subjects of ourselves or our ideals, we are not educating but indoctrinating them. Less obvious is the parallel case for the necessary presence of private interests within education: this

stems from the nature of Arendt's polemic, which takes her away from direct public-political outputs and towards the world at large, which seems to leave the private sphere completely outside of the scope of the discussion. What is more, this presumptive leaving-out is welcomed by many readers of Arendt, for instance those arguing for a thing- or world-centered approach to education (see Vlieghe & Zamojski, 2019). While I share the underlying critique of the "learnification" of education, which reduces the study of education to a mix of individual psychological processes and the hopefully efficient attainment of competencies, we should not conclude from this that the newcomers themselves are only there as potential reconfigurers of the world. Such a "world emphasis" would be one-sided in a similar way to the "student-centered" approach to education that dominates the study of "learning" today (Kloeg & Korsgaard, 2024). In addition to the political responsibility for the world, education likewise and in equal measure involves personal responsibility for the life and well-being of the newcomers: that much is clear enough from Arendt's writing. Here we need to make a similar distinction as with regard to public interests: while "the private" is necessarily present in and constitutive for education, we should prevent specific private preferences from entering into education and dictating its shape (see also Arendt, 2007, p. 19: an early essay by Arendt on the relationship between Jewish schools and German society). In a formulation by Philippe Meirieu, it is not any concrete desire but the inquiry into what is and what is not desirable which is a proper educational address (Meirieu, 2008). It may be true that students at a specific point in time would prefer to learn how to become influencers, for instance; this by itself does not mean that education should cater to such preferences on the part of students (or their parents, for that matter) as brute facts that must be catered to.

This leaves education not as a sphere among spheres seeking to empty itself of 'outside interference', but as a setting in which different spheres come into contact. Arendt herself was writing against the politicization of education, which in part addresses today's challenge of political interference and the specter of indoctrination. Again, this is not to be understood in terms of 'keeping politics out of education', but in terms of ensuring that education is not dominated by any specific political doctrine, which would counteract natality even where it would seek to enhance it: parallel reasoning applies to the reduction of education to catering to psychological learning profiles. But where does this leave us with respect to the other major context of entanglement encroaching on education today, namely the encroachment of large language models and pervasive 'ed-tech', all of them backed by enormous commercial resources? Arendt's own proposal to situate education in the societal sphere in her "Reflections on Little Rock" seems misplaced for a different reason here, since we are

not concerned with keeping our distance from institutional politics but from an aspect of civil society itself.

The above is a further instance of thinking “against Arendt” which follows from the direction I have been taking thus far. If education is not to be emptied of private and public interests, but at the same time cannot be dominated by them either, then this is here extended to the societal sphere as well. For example, the sphere of economic activity is present in any educational context, but it should not be allowed to dominate education and to impose its results from the outside. This would in a literal sense be the outcome of a one-sided focus on socialization, in the sense of Gert Biesta: one of education’s “domains of purpose” that specify its function. But an exclusive focus on socialization, which in our economic example could be successful insertion into the labor market, would lead to a reduction of education to successful insertion into a social order (Biesta, 2020), which based on Arendt’s analysis would be problematic for reasons that run parallel to her polemic against politicization.

Several quite general consequences follow from the argument so far. For one, rather than thinking of education as its own sphere which stands apart from society (taken here as the sum total of Arendt’s three spheres) in some kind of vacuum, it is more fruitful to think of education in terms of a plenum. Education should not try to eliminate public-political, private or societal interests, but rather engage their simultaneous, often conflicting, demands. Education is a complex “in-between” zone where these interests are constantly in play and it is precisely this fullness what characterizes it. We feel this all the more clearly today, as technological, political and other motives are each staking a claim on educational activity. Modern plagiarism detection tools often require us to produce data points to add to their database; occupants of the political sphere need to make us aware that their opponents’ version of history as codified in existing textbooks is fundamentally misleading; pupils and students are so efficiently incorporated into impulse-driven regimes of desire that they know exactly what they want to learn. Arendt herself locates an even more fundamental conflict at the heart of education, namely the conflict between the responsibility for the world and the responsibility for each individual student and their well-being (Kloeg & Noordegraaf-Eelens, 2024). Today it is not just the public sphere as such which can be opposed to the students’ need for protection, but also to the more particular interests of social media platforms which are driven by a rather different kind of engagement. In terms of how we respond to this situation, it should be clear from the foregoing discussion that banning the private, the public or “the social” from the classroom is not an adequate solution. At the same time, this is not to say that something like a mobile phone ban is necessarily a bad idea: pedagogically it could well be a

great idea. However, students should be allowed to engage with their private backgrounds and sociopolitical orientations within education, in a similar double-bind to what we saw with regard to the public orientation of education. The figure of entangled education that emerges is thus one that has to own up to its own messiness, but without becoming beholden to any single interest among the many that inhabit it. It should aim to keep its constitutive tension alive. Education does not stand apart from either private or public, but it should come apart from both of them.

All three of Arendt's spheres enter into education: the concern is how they can be kept from dominating education. Phrased positively, this is just Arendt's concern with natality in education, even though there are marked transformations compared to the letter of her own texts. The critical response to Arendt that I have been trying to develop targets the rigidity of her subdivisions, even though these also have their merit. For instance, there are clearly good reasons for distinguishing, even quite sharply, against the public-political sphere and education, and also between private and public spheres, and even between labor, work, and action. Yet we also find that education in fact involves the muddling of all these categories.

1.4 Where Does Education “come apart”?

The confrontation between the driving tensions and the conciliatory outcomes of Arendt's educational thought about autonomy should be related to an education context, within which educational activities are engaged in (possibly somewhere in between labor, work, and action). It is only in this context that we can address where education “comes apart” from “merely” private, societal, and public concerns and by the same token from the multiple contexts of entanglement encroaching on it today. One important practical question facing educators today is: “How can I keep societal forces from dominating education?” This question should be navigated moment-to-moment rather than through generalized, static answers. In closing I want to move toward a conceptual approach that can be used to develop both positive and negative answers to this question in practical contexts: the pedagogical reduction, as proposed by David Lewin (2017; 2018). Pedagogical activity, insofar as it separates itself from other kinds of activity, enacts the pedagogical reduction.

This perspective from pedagogical reduction assumes that in education the world is not simply “there” even though it is the reference point of education and that into which newcomers are to be introduced. It cannot be presented

in full: any attempt to present or describe the world involves a curated, subjective view that inevitably leaves out, omits, or obscures particular aspects. As pedagogical thinker Klaus Mollenhauer puts it, the underlying principle must therefore be: “Ceci n’est pas le monde” (2014, pp. 53-54). The separation between education and the public-political itself necessitates a pedagogical reduction in the sense that a representation of some kind is necessary: the world cannot only speak for itself. Here we can distinguish further between different kinds of enacting reduction. For Lewin “digital interfaces perform a technical reduction: the world is mediated to the user through technical objects that reflect the (anticipated) desires of the user” (Lewin, 2017, p. 171). The pedagogical reduction does not offer such a smooth or direct correspondence between desire and the way in which the world is framed. Rather, it seeks to put up for discussion whether the actual or potential desires of the newcomer, stemming from their private existence, are worth having (cf. Meirieu, 2008). From an Arendtian perspective this involves a coming-together (sometimes under conditions of conflict) of private aims and worldly conditions, but equally of societal processes and potential political responses. This should be done not from the perspective of an externally determined outcome, but as a way of keeping open the possibility of the world’s renewal: a possibility which addresses not only the world as such, but also the way in which it is represented within education, and the way the individuals in the classroom are situated with respect to it. In seeking out what is specific to education and how it is distinct from the goings-on of private, societal, and public life, we must look for friction between what is (for instance on the level of technologically scaffolded desire) and what might be.

The concept of reduction can thus be understood as a necessary mechanism that acts as a bridge between the world as such and its specific representations. For a digital interface successful mediation produces direct reflection of desire; for a pedagogical context successful mediation produces friction and putting issues up for discussion. This reflects the concept of entanglement, which is not a category of identity and sameness, but rather of difference combined with comingling. New technologies should not be brought in the position of imposing themselves on education. As the use of large language models (LLMs) will only become more widespread in the foreseeable future, students should be able to learn to critically read LLM-produced texts and glean their underlying assumptions in the same way as for non-computer generated texts. This does not mean that prompt engineering should now become part of their degree, except in the case of machine learning (ML) degrees. In much the same way, political ideologies should not determine educational content, while we acknowledge the inherent presence of politics in schools. In both cases, the cru-

cial difference lies in whether education reproduces a particular pre-existing position on technology or politics or whether it is able to make visible, raise questions about, and put up for discussion such positions without seeking to impose an outcome. That, for Arendt, would be to “strike from the newcomer’s hands their own chance at the new” (1961, p. 177). Refraining from imposition while also not seeking to “purify the classroom” is what is specific to the pedagogical activity: in-between activities corresponding to either the private realm or the public-political realm. In this sense, while it is not itself political action and cannot be, the pedagogical activity bears resemblance to Arendt’s notion of action, which does not seek to produce a pre-established result and thus gives the fullest expression to natality: pedagogical activity is an intervention which initiates something new, in the very gesture of introducing newcomers into the existing world. Arendt herself would likely not have agreed with education as an intervention, not even in the non-imposing sense that I am proposing; but I take this view to be a consequence of further reflection on the nature of educational activity. My particular way of undertaking said reflection, namely in terms of the pedagogical reduction, is animated by the same type of concerns about educational autonomy that worried Arendt and has been informed throughout by concepts from her work.

As an intervention, natality is not merely an underlying fact to be discovered but must be invented anew in every concrete educational setting and put into motion. At least in this sense I find myself in agreement with Arendt that natality is the essence of education, a challenge confronting any educator. Today’s technological and political contexts of entanglement are the contemporary, relatively broad version of this challenge. The specifically educational task at hand is not to hold education to standards given elsewhere, but to reverse the burden of proof: to account for and probe such standards from an educational perspective.

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2 Educational Hybrid Governance in the Privatization of Education Services

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Abstract

The chapter focuses on the issue of hybrid governance within the field of education. Hybrid governance represents a shift from the direct provision of services by state authorities to new modes of governance, in which public services are provided by various actors, including corporations, NGOs, and public-private partnerships, resulting from privatization. The involvement of private entities in the supply of education services raises fears of infringement of human rights and public law norms and of neglecting public values. The chapter conceptualizes publicness in education from socio-legal perspectives within the context of recent public-private educational practices. It discusses the intersection of hybrid theory and different dimensions and parameters of organizations and publicness theory. Based on an examination of case studies concerning various patterns of involvement of non-state actors within the education system, the chapter compares American and Israeli systems as two distinct approaches to managing privatized education. The chapter includes a comparative perspective and presents different approaches to managing educational hybrid governance arrangements. The chapter presents a new typology of different variants of public-private arrangements and the various levels of publicness associated with each variant.

2.1 Introduction

Hybrid governance represents the engagement of different actors beyond the state, such as corporations and NGOs, in fulfilling public tasks as a result of contracting out and privatization or other forms of delegation of public functions to non-state actors (Francesco & Rivke, 2016; Heinrich & Milward, 2010; Kettl, 2002; Hooghe & Marks, 2003). Hybridity has been defined as the complex interplay between institutional domains of public, private, and civic actors and activities within societies (Pinheiro et al., 2025). Hybrid governance arrangements are those in which non-state actors carry out functions traditionally attributed to the public authorities (Francesco & Rivke, 2016). In the age of hybrid governance, public services are provided by various actors, some of which are part of the private sector, others belong to the third sector, and some are mixed organizations – hybrid bodies (Salamon, 2001; Barak-Erez, 1994).

The chapter focuses on the issue of educational hybrid governance. The involvement of private entities in the design and implementation of education policy raises fears of infringement of human rights, neglect of public values, and adoption of commercial goals. Educational hybrid governance and the supply of educational services by private organizations raise the need for the involvement of courts by extending the application of public law norms and constitutional rights to private entities (Dannin, 2000).

Most hybrid governance literature explored the efficiency of hybrid arrangements and the control over hybrid organizations or focused on the role that legislators, bureaucrats, and regulators play in the area of regulation (Benish & Levi-Faur, 2012; Jan-Erik & Vakkuri, 2017). The previous literature has not thoroughly discussed the role that courts might play in the specific area of education in applying public law norms and constitutional rights. It also has not discussed the various kinds of organizations within educational hybrid governance settings. Moreover, the previous literature on hybrid governance has not explored the differences between American and Israeli trends of applying public law norms and constitutional rights in the field of education.

The current chapter wishes to fill these gaps in the literature by presenting different forms of educational hybrid governance. In this respect, the chapter includes a comparative perspective and presents different approaches to the application of public law norms and constitutional rights in educational hybrid governance arrangements and explores their application in the American and Israeli jurisprudence. The chapter focuses on the Israeli and American jurisprudence as two systems characterized by patterns of privatization of education but represent distinct approaches regarding the application of public

law in post-privatization reality. Within the framework of privatized education, the chapter presents a new typology of different variants of public-private arrangements and organizations for the supply of education services, each presenting different levels of publicness.

The theory of publicness claims that the classification of organizations as private or public requires a multidimensional approach that positions organizations along a scale of a public-private continuum (Bozeman, 1984; Anderson, 2012). Publicness dimensions refer to the degree of public characteristics of a certain entity that can include a few parameters: public funding, diversity of aim, and whether the organization is a for-profit entity incorporated as a corporation, enhancing either public interest goals or profit-oriented goals (Litor et al., 2020). Other indicators of publicness could be the degree of control exercised by public authorities versus the freedom of operation typical of private bodies, or the issue of partial public ownership or involvement in the management versus total private holdings (Litor et al., 2020). The chapter presents a new typology of different variants of public-private arrangements and the different levels of publicness associated with each. Thus, the chapter conceptualizes publicness in education from socio-legal perspectives within the context of educational privatization practices.

The chapter is structured as follows. The first section focuses on the reasons for the privatization of education and discusses the problems, considerations, and issues in hybrid governance settings. The second section represents different approaches of courts regarding hybrid organizations in the privatized education arena. The third section discusses American court rulings and a typology of different types of organizations for supplying privatized education services in the United States associated with different degrees of publicness. The fourth section discusses Israeli jurisprudence and the typology of organizations. The fifth section includes a discussion of the findings and the contribution in relation to existing literature in the field of education privatization.

2.2 Privatization of Education

2.2.1 *Privatization of Education and its Reasons and Benefits*

The concept of hybrid governance and the trend of privatization are based on the belief that private market forces may be more efficient in providing public services than government bureaucracies (Meir et al., 2004; Bevir et al., 2003). This belief is grounded in the inefficiency of the large and complex public hier-

archy (Peters, 2001) and the motivation of private entities, driven by the goal of maximizing financial profit, to operate efficiently (Donahue, 2009). Privatization is also expected to enhance the quality of services by enabling quicker response times, dynamic service, technological innovation, and the utilization of market knowledge and expertise (Stoker, 2000; Poole, 1996; Klijn, 2002). Moreover, privatization allows service recipients to choose from a variety of providers, increasing their autonomy and enabling services that align with their unique ideologies and needs (Minow, 2002).

Proponents of privatization of education focus on the concept of free choice. They argue that privatization could lead to a more democratic system by diminishing the influence of the Ministry of Education while empowering individual parents and diverse communities. That is, supporters of the privatization of education aim to shift authority from the centralized public system to civil society. Many voices oppose the authorities' control over the system's content and objectives, advocating for greater diversity and challenging this authority. Additionally, from a pedagogical standpoint, there is often opposition to the traditional and conservative nature of institutional schooling in terms of teaching methods. Many are interested in creating new alternatives to traditional schooling, such as open and democratic schools. This encourages pluralism and tolerance for different identity groups. Opening the market to competition and enabling individual choices may lead to the mobility of individuals from disadvantaged groups (Becker, 1995).

When privatization shifts governmental responsibilities to non-profit organizations, it enables the utilization of the unique capabilities of these voluntary groups. They excel in mobilizing independent resources and donations and possess the potential to effectively engage volunteers. The involvement of non-profits in privatization strengthens civil society and allows for the effective representation of diverse interests, particularly those of disadvantaged groups (Minow, 2002). This representation makes it easier for individuals from marginalized communities to access the services they need. Moreover, non-profits can bring a compassionate and value-driven approach to their social service provision, something that is often lacking in bureaucratic mechanisms (Minow, 2000; Diller, 2001).

2.2.2 The Problems Associated with Privatizing Education

Despite the apparent benefits of providing education by private entities, their operation comes with many challenges. These challenges necessitate the development of legal regulations governing their activities.

In the wake of privatization, it became increasingly apparent that private entities motivated by economic goals may inadvertently compromise the welfare of service recipients. These entities have been criticized for prioritizing commercial interests over public interest. Thus, privatization can sometimes lead to a decrease in service quality and harm to service recipients, often due to cost-saving measures (Gilman, 2001).

In cases of privatization of education, the need for regulation arises (Metzger, 2003) due to corporations' inherent conflict of interest, which often prioritizes shareholder interests and profit maximization (Benish & Levi-Faur, 2012). Furthermore, it is argued that in most cases of outsourcing in the United States, the primary goal is to reduce the cost of the service, with ensuring service quality being only a secondary concern (Donahue, 1989; Minow 2002, 2009).

While privatization has sometimes enabled universal participation in education, pupils' opportunities are often unequally distributed. Thus, privatization develops structures that can potentially deepen inequality patterns and uneven distribution of educational opportunities (Rizvi, 2016).

Despite the thought that privatization might improve the quality of education, publicly funded private schools often do not show an advantage in academic results for those attending them (Lubienski, 2013). Moreover, in the United States, private schools have often been more economically and racially segregated than public schools, and underrepresented pupils with special needs. In Europe, scholars show that the privatization of preschool leads to a reduction in the favorable impact that preschool attendance usually has on the capacity of children to succeed in higher education (Janssen et al., 2024).

Privatization of education not only specifies how schools are funded or administered, but privatization has the potential to change the very nature of education and to transfer the organizational culture of schools. Privatization often leads to the development of certain commercial-oriented conceptions of teaching and learning, which are rather different than those included in public education, which is focused primarily on enhancing the public good (Rizvi, 2016).

Some scholars claim that privatization of education undermines democracy and public values (Hursh, 2016). They argue that public schools were created as learning communities that developed trusting and caring relationships among people. Nevertheless, in private schools, where children are viewed as customers, the democratic function and public values have been diluted. Students are mostly prepared for a competitive society, following the fact that privatization is grounded in the neoliberal concept of enhancing competition and free market ideas (Hursh, 2016).

The notion that privatization benefits the less privileged segments of society can sometimes be unfounded. In practice, privatization often does not lead to a reduction in disparities in service levels among different groups. For example, in the United States, the privatization of education did not effectively narrow the gaps in educational attainment. Students from less affluent backgrounds who attended private schools using voucher systems did not consistently receive a better education compared to their peers in public schools. This indicates that privatization did not lead to the advancement of marginalized groups. When voucher programs were implemented, it also became evident that parents from disadvantaged backgrounds often lacked the capacity to make informed choices about schools and assess different options, unlike parents from more established groups who had greater resources to transport their children to distant schools (Lubienski, 2013).

Furthermore, the privatization of education through vouchers in the United States often did not yield the anticipated outcomes. Students who transferred to private schools did not exhibit improved academic performance. Instead, the voucher system led to many private schools catering exclusively to weaker populations. Moreover, prestigious private schools often tend to reject less advantaged students, thereby failing to reduce educational disparities or promote social mobility (Lubienski, 2013). Residential properties located near prestigious schools often command higher prices, making it challenging for low-income families to afford housing in those areas (Ladd, 2002). This is partly influenced by parents' tendencies to select schools based on the socio-economic composition of the school population. Parents from higher socio-economic classes typically opt for schools where the majority of students come from similar backgrounds (Carnoy, 1997). Consequently, students from less privileged socio-economic backgrounds may find themselves on the fringes of these schools (Ladd, 2002).

The operation of private entities not only falls short of reducing societal gaps but can also exacerbate inequality among service recipients. Privatization can lead to preferential treatment for individuals of wealth or influence at the expense of ordinary citizens.

The involvement of private entities can have divisive consequences and lead to harm for vulnerable groups, deepening inequality in society (Milward & Provan, 2003). Private entities may make access to services conditional on high financial payments, which can result in violations of human rights (Barak Erez, 1994). Commercial entities may also require financial stability, such as keeping up with payments and living in a certain area, which can result in providing lower quality services to the less privileged, further harming equality and individual rights. Opponents of the privatization of education maintain that it will

lead to increasing social disparities. Privatization will not establish an egalitarian and democratic education market but will allow commercial economic interests to grow. The free-market ideology will be used as a proxy for the promotion of private interests and the weakening of the public institution, which can represent various social interests. This reality is expected to deepen class and cultural segregation between students from different economic groups. Critics of education privatization argue that it will exacerbate social disparities and prioritize commercial interests over equal access to education.

The fear of potential inequality and decreased access to services after privatization highlights the need for thorough oversight of privatized entities. Regulations should specifically safeguard marginalized groups in society, as they are particularly vulnerable to the negative impacts of privatization.

The phenomenon of privatizing education has raised concerns about the emergence of a democratic deficit, which occurs when public functions are carried out by private bodies (Gilman, 2001; Minow, 2009). Since the exercise of governmental power by private organizations has been considered mostly immune from the application of public law norms, the concern is that increasing reliance on private entities that perform once-public functions and are allegedly free from public law duties will cause harm to human rights and democratic values (Rosenbloom & Piotrowski, 2005).

Delegating authority to non-state actors through privatization and the growing role of the private sector within the public policy arena could lead to negative implications since private entities' goal is to advance economic interests as opposed to state actors, which advance the public interest (Verger et al., 2016). Thus, the privatization of education might bear negative consequences, and be a challenge to the concept of education as a public good – often privatization might affect human rights and the right to education (Verger et al., 2016). In addition to the potential risk of affecting education quality and the rights of pupils, privatization might result in neglecting employees' interests in an attempt by private entities to cut costs.

These concerns raise questions about the role that courts play through their rulings regarding private bodies that supply education services.

2.2.3 Methodological Section

The chapter is based on case studies from Israeli and American courts yielded from jurisprudence databases. Regarding the Israeli jurisprudence, the Nevo database was used. The keywords used for searching for cases were: hybrid body or hybridity, together with education privatization or education/school. In regard to the American jurisprudence, the Lexis Nexis database was used.

The keywords used for searching cases were: state action or state actor, together with education privatization or education.

2.3 Different Approaches and Parameters in Privatized Education

The chapter presents two approaches regarding the application of constitutional rights and public law norms to private entities in privatized education services. The main distinction between the approaches relates to parameters of high publicness, contrary to low publicness. Publicness focuses on the public characteristics of the entity as opposed to private ones (Litor et al., 2020; Bozeman, 1984;1987;1994;Thoenig 1988).

The two approaches are the liberal regulatory approach and the operational regulatory approach. The former, based on classical liberal thought (Mill, 1974), is relatively narrow and tends to preserve the dichotomy between public and private, and therefore tends to refrain from a vast application of public law norms on private entities. It limits the application of constitutional rights and public law norms mainly to those entities characterized by a high degree of publicness that have a close connection to public authorities. As opposed to the liberal regulatory approach, the operational regulatory approach is a comprehensive approach, according to which the public-private divide should be rejected or limited. This approach either allows the general application of constitutional rights to private bodies or is willing to apply constitutional rights and public law norms even upon a low degree of publicness of the private entities. It also adopts role-based parameters, based on the nature of the entity's function, irrespective of the source of its power.

Role-based parameters are rather wide and base amenability to constitutional rights on the duty that the body carries on (Litor et al., 2020). The role-based parameters use flexible tests which enable the application of public law on a variety of private entities, regardless of their connection to the authorities. This operational regulatory approach exposes a larger variety of entities to constitutional rights.

The liberal regulatory approach, which posits that the dichotomy between the public and private should be preserved, adopts a minimal application of public law. The approach tends to refrain from laying extra duties on private bodies in an attempt to advance the privatization process, which is aimed at gaining efficiency and reducing the prices of public services.

As opposed to the former approach, the operational regulatory approach is based on the theory of critical legal studies, according to which the dichotomy

of the private-public divide should be rejected or limited (Kelman & Kelman, 1994). The critical law studies theory critiques the liberal constitutional order and its tendency to avoid the imposition of constitutional duties and public law norms on private entities (Kennedy, 2002). The approach posits that a constitutional order which is based on liberal thought lacks the necessary autonomy in relation to private power and the ability to control it. The goal of the theory of critical legal studies is to change the existing system of social hierarchy, including its class discrimination and power relations, in the direction of greater equality. It captures the public-private divide as strengthening corporations and capital holders. It claims that by preserving the public-private divide, corporations manage to avoid necessary obligations to human rights (Kennedy, 2002).

The operational regulatory approach, as a comprehensive approach, posits that constitutional rights should be either applied generally to every private body or comprehensive tests for their application should be adopted. This approach enables the application of public law to a diverse range of entities. This approach posits that the application of public law should include entities performing ex-governmental functions despite a lack of government control over them, such as no partial public holdings or situations of partial public control over the management of the entity. Hence, a body carrying out public functions should be subject to public law norms, regardless of the nature of the body or its connection to the governmental authorities. According to these parameters, a formal public authority or even the ability to allocate public funds is not needed as a condition for applying public law norms.

Contrary to the operational regulatory approach, the narrow perception of the liberal regulatory approach leads to the adoption of close nexus parameters that limit the implementation of public law norms to bodies with governmental authority and a close connection to the public authorities. Thus, under the liberal regulatory approach, an outsourcing contract, public funding, and administrative supervision are not sufficient for applying constitutional rights. Mostly, a formal delegation of statutory authority is needed, and a close connection with the authorities is a precondition for applying public law norms to non-state actors.

Thus, the liberal regulatory approach is a narrow doctrine, allowing the application of public law norms and constitutional rights only based on a high degree of publicness, whereas the operational regulatory approach is a comprehensive approach allowing the application of public law norms even upon bodies with a low degree of publicness.

2.4 The American Jurisprudence

2.4.1 *The Principles regarding Privatizations*

The application of public law norms to private entities by the American judiciary is based on the “state action” doctrine (Minow, 2017). This doctrine enforces public law norms on private entities that have special public characteristics and thus are considered state actors. Nevertheless, the approach of American jurisprudence is rather narrow, allowing only a limited number of private entities to be considered state actors. Several tests have been developed by the American Supreme Court to designate a private body as a state actor, most of which require a close connection to the public authorities.

The main test in this regard is the “close-nexus” test. This test requires substantial governmental involvement in the challenged private acts as a precondition for the implementation of public law norms. A sufficient close nexus is necessary to qualify the private entity as a state actor and subject it to public law norms.

2.4.2 *Typology of Organizations in Privatized Education in the United States*

There are a few types of schools that supply privatized education. The first type of organization that operates in the field of privatized education is a private school. Traditionally, private schools operate with relative independence from the state. The rate of publicness is very low, and therefore, these kinds of institutions would not be subject to public law.

The second type of organization in the field of privatized education is a contracting private school. This is a private school contracted with public authorities or public schools to supply certain educational services. These kinds of schools are characterized by a medium degree of publicness. The school is mostly a not-for-profit NGO with a public interest goal, and governmental funding, and is under governmental regulation, including a duty to post monthly reports.

The third type is a private association for the supply of educational services or association of sports which is operated partly by a partnership of public and private schools. If the association is operated mostly by public schools, it has a high level of publicness.

The fourth type of organization is a charter school. Charter schools are schools that operate within the bounds of a contract (called a charter) with a state or local government and supply public schooling instead of the authorities. Because public charters operate through a separate agreement rather than

under the rules and regulations of a school district, they typically have more flexibility to determine curricula and school policies, much like traditional private schools. Despite this additional flexibility, public charters are publicly funded entities that are subject to the performance standards outlined in their charters. Since charter schools operate under state regulation and enjoy public funding, they are characterized by a medium degree of publicness. Moreover, the employees of charter schools are mostly considered public employees. Charter schools are characterized by a high degree of publicness, as they are established only with the help of the state, and the schools are subject to various rules and regulations to which private schools are not. Moreover, those who attend charter schools enjoy free studies, which are funded by the state.

2.4.3 Courts and Privatization in the United States

The American jurisprudence adopted a liberal regulatory approach, which imposes narrow tests and parameters for applying constitutional norms. The rejection of a comprehensive approach is reflected in a few practices. The first element of the narrow approach of the American jurisprudence is derived from the fact that the application of public law norms could be rejected, even in cases of a high degree of publicness, including cases of non-profit NGOs with a public aim, and vast public funding, and extensive regulation by the authorities. A second element of the narrow approach of the American courts has been derived from the rejection of functional parameters and the adoption of close connection tests.

In this respect, American jurisprudence has been willing to base amenability to public law on functional tests only when the relevant task has been historically carried out solely by the state itself. The possibility of implementing the functional test has been restricted to cases in which the private body fulfilled a function that has been traditionally a sole prerogative of the state. Moreover, these parameters require a tight linkage to the public authorities for the recognition of state actor capacity and sometimes require acting under statutory authority. According to this approach, the courts have applied constitutional rights mostly to private schools that have a close connection to the authority.

The classification of organizations, as illustrated in the table below (Table 2.1), is based on several parameters that assess the extent of their publicness. Firstly, the issue of ownership is considered, distinguishing between private and partially public entities. Secondly, the level of involvement by public authorities in the management and regulation of these private organizations is evaluated. Thirdly, the extent of public funding received by these entities

is analyzed. Fourthly, the diversity of their objectives is taken into account, differentiating between those aimed at public benefit and profit-driven organizations. Lastly, consideration is given to the structural form of the organization.

The table below demonstrates that courts have rejected the application of constitutional rights or public law norms, even when the organizations in question exhibited a high or medium degree of publicness. Specifically, courts were often reluctant to recognize the status of state actor, despite the significant public involvement, substantial public funding, or the public-oriented goals of these private entities, including NGOs. Thus, in various cases, the application of public law norms was not upheld.

A ruling in point is the *Rendell-Baker* case in which the Supreme Court held that a private school was not a state actor even though ninety-nine percent of the school's budget was based on public funding and the school was subject to extensive bureaucratic regulation including the duty to submit monthly reports. Despite a medium to a high degree of publicness, the court held that constitutional rights would not be applied (Yarrell, 2024). The court noted that even though the private school contracted with public authorities to teach children with handicaps, it was not subject to constitutional rights and did not engage in state action when it dismissed one of its teachers. Therefore, the 14th Amendment did not apply. The court emphasized that the private school, even though contracted to supply education essential services, was not fundamentally different from many commercial corporations that are contracted with public authorities to build bridges, dams, or ships. The court stated that acts of such private contractors do not become acts of the government just by virtue of the governmental funding and regulation, and their total or significant engagement in performing public contracts. In this case, the refraining of the US Supreme Court from applying a state actor doctrine indicates that the court embraced a narrow approach. Thus, American jurisprudence often ignores the possibilities of applying public law regarding bodies with a high degree of publicness.

The American jurisprudence adopted a narrow approach that interprets the possibility of applying public law based on the delegation of a public function narrowly. The Court thus explained that “the relevant question is not simply whether a private group is serving a public function, but rather, the relevant question is whether the function performed has been traditionally the exclusive function of the State. Thus, in the *Rendell-Baker* case, although the school's provision of education to those special students served a public function, in spite of the fact that function largely was funded through the school's contracts with state and local governments, the court reasoned that the private school was not fundamentally different from many private corporations whose busi-

ness depends primarily on contracts to build physical infrastructure for the government. Acts of such private contractors do not become acts of the government based on their significant or even total engagement in performing contractual services for public entities.

In the *Logiodice* case (*Logiodice v. Trustees of Maine Cent. Inst.*, 296 F.3d 22, 27 (1st Cir. 2002)), the court held that a private school contracted to supply public services was not a state actor while rejecting the functional parameters. The First Circuit Court held that a private school that contracted with the state to be the exclusive provider of public education in a main school district did not engage in state action when it disciplined a student. The court implemented the decision in the *Rendell Becker* case and emphasized that it is not enough that the function would be one that is sometimes performed by the government. Rather, it should be a function that has been exclusively carried on by the state. The court stated that since education has never been a function preserved only to the state, the school was not a state actor.

In a similar case, the *Robert* case (*Robert S. v. Stetson Sch., Inc.*, 256 F.3d 159, 166 (3d Cir. 2001)), the third circuit held that a private school funded by the state that educated juvenile sex offenders was not a state actor, since education has not been a function exclusively performed by the state.

In the *Brentwood Academy* Case (*Brentwood Acad. v. Tenn. Secondary Sch. Athletic Ass'n*, 531 U.S. 288, 299-300 (2001)), the court held that a private statewide secondary school athletic association is a state actor, based on the extent of 84% of its membership, which was based on public schools. The court emphasized that the association is an organization of public schools represented by their officials acting in their official capacity to provide an integral element of secondary public schooling. There would be no recognizable association, legal or tangible, without the public-school officials, who do not merely control but overwhelmingly perform all but the purely ministerial acts by which the association exists and functions in practical terms. Only the 16% minority of private school memberships prevents this entwinement of the association and the public school system from being total and their identities indistinguishable.

The court emphasized that to the extent of 84% of its membership, the association is an organization of public schools represented by their officials acting in their official capacity to provide sports services, which is an integral element of secondary public schooling. There would be no recognizable Association, legal or tangible, without the public-school officials, who do not merely control but overwhelmingly perform all but the purely ministerial acts by which the association exists and functions in practical terms. Only the 16% minority of private school memberships prevents this entwinement of the association and

the public school system from being total and their identities indistinguishable.

Other cases of privatized education involve charter schools. Charter schools are an alternative to public schools but operate outside the public regular system (Wren, 2000). Charter schools typically receive public funds but are not subject to the extensive regulations that states place on traditional public schools (Wren, 2000). The charter schools are normally operated by a group of private individuals outside the local school district, including teachers and parents. The charter schools are usually operated by non-profit organizations but sometimes are operated by for-profit corporations. Charter school receives a charter from the state, which is a contract between the school and the state (Wren, 2000).

In 2022, in *Peltier v. Charter Day Schools* (no. 201001, 4th Cir.), the U.S. Court of Appeals for the Fourth Circuit held that a charter school's dress code policy discriminated against female students based on sex. The court held that North Carolina's charters are state actors, and therefore bound by the Constitution. The court found that because of the specific statutory framework of the North Carolina charter school system, coupled with the conclusion that the state had delegated its authority regarding public education to the charter school that operates and carries out the state's duty to provide free universal elementary and secondary education, they must adhere to student constitutional rights. The state bears the affirmative obligation when the state has an obligation to educate the students, and has partially delegated the function to charter school operators, who have carried out the state's obligation by virtue of their charter with the state. Such a delegation of the state's responsibility renders a private entity a state actor status.

The court held that charter schools perform a function of public elementary schools that has been historically exclusively carried out by the state. The court emphasized that the North Carolina law designates employees of charter schools as public employees eligible to receive certain state benefits, including state-employee health and retirement plans. The court held that North Carolina has exercised its sovereign prerogative to treat these state-created and state-funded schools as public institutions that perform the traditionally exclusive government function of operating the state's public schools. Accordingly, the public-school operator CDS implemented a "skirts-only" requirement for girls as part of the school's educational mission, exercising the power possessed by state law. The court emphasized that charter schools were not simply an alternative means of education, like private schools or homeschooling, but were created and funded by North Carolina to provide free universal elementary and secondary education (Walton, 2024). Yet, the court emphasized that RBA, the

for-profit management contractor of the school, is not a state actor. Despite its role in daily school operations and its responsibility for enforcing the skirts requirement, RBA was not recognized as a state actor.

In the *Riester v. Riverside Community School* case (257 F. Supp. 2d 968, S.D. Ohio 2002), an Ohio federal district court analyzed whether commercial corporations that operate charter schools could be considered state actors. The case involved a former charter school teacher who brought a § 1983 action against the charter school on First Amendment grounds. The court held, based on the entwinement test, that both the charter schools and the managing corporations were state actors. The court emphasized that the school in question was established only with the help of the state, and the school was subject to various regulations to which private schools are not subject. In this case, the court also applied the functional test and emphasized that public education has been traditionally a sole prerogative of the state.

Table 2.1 American jurisprudence and typology of organizations in privatized education

The body/ Case	Public partial ownership or private ownership	Public involvement in manage- ment/public regulation or private management	Private or public funding	Aimed at public interest or for profit	Structure -form	The total degree of publicness/ Decision of the court
<i>Rendell-Baker Logiodice / Smith</i> Contracting Private School	Private Ownership- Low publicness	Private management Public regulation- Medium publicness	Public Funding- High publicness	NGO Aimed at public interest- High publicness	Contracting -Medium degree Of publicness	Medium to high Degree Of Publicness/- Non- application of constitutional rights
<i>Brentwood Academy</i> Sports association Operated by public schools	Public partial Ownership- highness	Public management- High publicness	Public Funding- High publicness	Aimed at public interest- High publicness	NGO	High Degree Of Publicness/- Application of constitutional rights
<i>Riester/ Peltier:</i> Charter School	Private Ownership- Low publicness	Private management- low publicness	Public Funding- High publicness	NGO- High publicness	Its employees are public employees- Free of charge-High Degree of publicness	Medium-High degree Of publicness- Application of constitutional rights

2.5 The Israeli Jurisprudence

2.5.1 *Typology of Organization in Privatized Education in Israel*

There are different kinds of private entities operating in the privatized education arena. The first type is private schools, which are operated by a public-private partnership and are mostly partially owned by a municipality, which has the right to nominate part of the directors. This kind of private entity is characterized by a high degree of publicness due to partial public ownership and involvement in the ongoing operation.

The second type of private entity is the “recognized unofficial institutions”. These are usually art schools and science schools, which are operated by private associations, with no public ownership. Recognized, unofficial private schools often belong to a religious stream and are operated by religious orthodox associations or churches. These schools are characterized by private ownership and private management and operate under the supervision and state regulation regarding the teaching materials. They operate under public regulation, enjoy public funding, and therefore reflect a medium degree of publicness. Moreover, these institutions operate according to the authority granted in the education legislation. The National Education Regulations (Recognized Institutions) 1953 and The Supervision of Schools Act 1969 granted the recognized unofficial institutions the authority to supply education services. These schools are characterized by medium degree of publicness.

A third type of entity is the exempt institutions. Unlike the recognized unofficial schools that have statutory authority, they operate under the regulation of the Ministry of Education and enjoy public funding. The third kind of organizations, which are unrecognized schools, are not publicly funded (either 0% of their budget is publicly funded or up to 30%). These schools do not operate according to the national official education policy, which includes core learning materials. They do not teach the national core education program, which includes the study of mathematics and science. Some of these schools belong to the orthodox streams and do not teach mathematics, science, grammar, and languages, but rather teach mainly bible studies and religious studies. These kinds of institutions are not under extensive public regulation and are characterized by private management and reflect a low degree of publicness.

A fourth type is commercial corporations contracted with the education ministry or the municipality to supply education services and teach lessons. These corporations involved in contracting out with the government, lacking any statutory authority, are private firms that operate in public schools where

temporary teachers work. Parts of the Israeli public schools' educational extra-curricular activities, such as art and music classes, are conducted by private corporations' employees. The private corporations' authority to supply educational services in public schools is based only on their contract with the state or the local municipality. These types of bodies are characterized by private ownership and management, are for-profit commercial corporations operated for private aims, and based on a private budget. Therefore, they reflect the very low degree of publicness.

The fifth type is private schools, which operate according to their own educational agenda and are not subject to the national program of core studies. These types of schools are characterized by very low publicness, due to private ownership, and no governmental budgeting.

2.5.2 Courts and Privatization in Israel

Israeli constitutional documents include two Basic Laws regarding human rights: The Basic Law Dignity and Liberty and the Basic Law Freedom of Occupation. Following the introduction of these basic laws in the 1990s, the courts considered the rights included in them as constitutional (Litor, 2024;2026). Moreover, the courts have recognized over the years a few other rights as constitutional and derived from statutory rights (Litor, 2022;2023;2025).

Several tests were developed in the *Mikrodaf* case for recognizing a hybrid body – in between private and public, which is subject to public law norms. The first test examined private engagement in a public function, that is, the fact that a private body is carrying out governmental tasks (HCJ 731/86 *Mikrodaf* 1987). The second test is the essential services test, according to which a supply of an essential service is considered a basis for the application of public law norms, mainly when the service is consumed by a large population. The third test is the monopolistic power test, according to which, a monopolistic control over the supply of a public service justifies the application of public law obligations. These parameters mainly focus on the nature of the public task carried on by the private body. A fourth test was developed in the *Kastenbaum* case (HCJ 294/91 *Kastenbaum* 1992), the governmental authority test, according to which the exercise of governmental authority by a public body is a basis for the application of public law alongside other tests.

2.5.3 The Israeli Jurisprudence on the Privatization of Education

The following table (Table 2.2) categorizes organizations based on several parameters that determine their level of publicness. These parameters include

the following. First, Ownership – distinguishing between private entities and those that are partially public. Second, involvement of Public Authorities – assessing the extent to which public authorities engage in the management or regulation of these organizations. Third, Public Funding – evaluating the level of financial support received from public sources. Fourth, Purpose – considering whether the organization primarily serves public interests or functions as a profit-oriented entity. Fifth, Structure and Form – examining the organizational structure and legal status of the entity. Together, these factors offer a comprehensive understanding of the publicness of various organizations.

The table below illustrates that Israeli courts have been willing to apply public law norms even in cases with a lower degree of publicness. Thus, the courts were willing to apply public law even in cases of private funding or in cases of contracting out associated with a low degree of publicness. A notable example is the *Tabeka* case (HCJ 7426/08 *Tabeka* 2010), where, despite the lower degree of publicness and private funding, the court opted to apply public law norms.

The Israeli courts embraced an operational approach. For instance, in the *Zvizner* case (National Labor Court 1123/01 *Zvizner* 2001), the court held that a school operated by a private-public partnership, in which the local municipality had partial holdings and nominated half of the directors, was considered subject to public law norms.

Other examples refer to the recognized but unofficial institutions which are operated by private associations with no public ownership. Despite only a medium degree of publicness, they were considered subject to public law. An example would be the *Asulin* case (Labor 2227/02 *Asulin* 2007) involving a school of the Orthodox religious stream. The school dismissed a headmaster on the grounds of her religious ideology, which they claimed did not suit the Orthodox one. Based on governmental financial support, the school was found to be subject to public law norms and to have violated its duties in dismissing the headmaster based on irrelevant parameters.

In the *Binun* case (Labor Appeal 109-08 *The Center of Bible Education v. Binun* 2008), the court held that a school belonging to an unofficially recognized educational institution was subject to public law norms in dismissal of the headmaster. The court emphasized functional reasoning according to which the school supplied essential services of education. It further held that the school enjoyed governmental budget and operated under supervision and state regulation regarding the teaching materials.

The court held in the *Poriya* case (HCJ 4363/00 *Poriya parents representatives v The Education Minister* 203, 2002) that an unofficial recognized school was sub-

ject to public law norms. The court emphasized functional parameters and held that the school had the authority to supply educational services, and mentioned public financial support as a reason for applying public law.

In the *Busy* case, the court held that a kindergarten, belonging to a religious chain of unofficially recognized kindergartens, was subject to public law norms (Labor Appeal 203/09 *The Agudat Israel Kinder Garten chain v. Busy* 2011). The court emphasized that the school operated according to the authority granted in the education legislation. In the *Beit Hana* case (Labor Appeal 506-09 *Horvitz v. Beit Hana Association* 2009), the court held that an unofficial recognized school was subject to public law norms due to financial public support and to the public nature of the services it provided. Another example would be the *Amrani* case (Labor Appeal 28650-11-17 *Bnei Zion Association v. Amrani*), in which the court held that a regulation regarding teachers in public schools would also apply to teachers in unofficial recognized schools. The court emphasized the right to equality and the application of constitutional rights to these schools and kindergartens.

Unlike the recognized unofficial schools that have statutory authority, operate under regulation of the Ministry of Education, and enjoy full public funding, the exempt institutions which are unrecognized schools, are not fully publicly funded (only part of their budget is publicly funded) and are not regulated by the government as for the teaching materials, and are not subject to the official core learning program. Yet, despite the low degree of publicness, lack of statutory powers, and weak connection to the state, Israeli courts ruled that they are subject to public law. Thus, in the *Tabeka* case (HCJ 7426/08 *Tabeka* 2010), the court stated that an exempt institution is subject to public law norms based on the public function the school fulfills, and therefore cannot refuse to accept pupils on the grounds of belonging to a different religious community. The court ruled that the private religious school was subject to the constitutional right to education and therefore should have accepted all pupils and treated them equally.

The Israeli judiciary also applied public law norms to corporations that have a contract with a public authority for supplying education. It indicates a wider approach since these rulings refer to entities that lack statutory authority. An example of corporations involved in contracting out with the government, lacking any statutory authority, and yet subject to public law, are private firms that operate in public schools. Parts of the Israeli public schools' educational extracurricular activities, such as art and music classes, are conducted by private corporations' employees. The private corporations' authority to supply educational services in public schools is based only on their contract with the local municipality. In the *Sharky* case (Labor 4286/06 *Sharky* 2007), for instance,

Table 2.2 Israeli jurisprudence and typology of organizations in privatized education

The body/ Case	Public partial ownership or private ownership	Public involvement in manage- ment/public regulation or private management	Private or public funding	Aimed at public interest or for profit	Structure -form	The total degree of publicness and the decision of the court
Zvizer- Public-private Partnership	Partial Public ownership- High publicness	Public involvement in management- High publicness	Public Funding- High publicness	Aimed at public interest- High publicness	Privatized-low to medium publicness	High Publicness- Applying public law
Asulin, Beit Hana, Binun/ Elabid, Oster Fisher Porya Busy, Evangelica School Amrani Recognized Unofficial School	Private Ownership- Low publicness	Private Management/ Under public regulation -Medium publicness	Public Funding- High publicness	Public interest-NGO- High publicness	Privatized-Low publicness	Medium Publicness- Applying public law
Tabeka- Exempt institution	Private ownership- Low publicness	Private Management/ Not under public regulation -low publicness	Private funding- -low publicness	Private aim- NGO -medium publicness		Low Publicness- Applying public law
Sharky- Contracting out	Private ownership- Low publicness	Private Management/ Not under public regulation -low publicness	Private funding- -low publicness	Private aim- For profit corporation- Low publicness	Contracting - Low publicness	Very low Publicness- Applying public law
Atid Private school	Private ownership- Low	Private Management/ Not under public regulation -low publicness	Private funding- -low publicness	Private aim- NGO -medium publicness	Private Organization- Low publicness	Low Publicness- Applying public law

the court ruled that a private corporation conducting drama classes in public schools was a body with public characteristics. The court emphasized that the private corporation was subject to public law norms based on its public funding and on the outsourcing contract that the corporation had signed with the Ministry of Education.

Another ruling in the *Atid* case emphasized the significance of free choice as a foundational factor in approving the operation of a private Scientology school. The case involved a private school that operated without financial assistance. The Ministry of Education sought to shut down the school due to low academic standards, unqualified teaching staff, and pedagogical concerns. However, the court decided that allowing the private school to operate was essential to accommodate parental preferences (Civil Case 1294/01 *Beit Sefer Atid v. The Ministry of Education* District 2001 (3) 830). The court ruled that the right of parents to raise and educate their children as they see fit is a fundamental constitutional right. The court held that even though the school was private, it was still subject to the right to education and equality in education.

2.6 Discussion

The literature on education privatization has focused on the global phenomenon of decentralization, deregulation, and privatization of schools. Some of the literature dealt with the plurality of reforms of privatizing education, ranging from contracted-out providers and quasi-markets, to new public management arrangements of autonomy of schools and market mechanisms within the public sector (Zancajo et al., 2025). This literature has mostly discussed the reasons or results of the privatization of schools and educational activities. Recent studies within the literature of education privatization pointed to marketization as one of the main motivations that underlie the willingness to privatize (Lubienski & Joel, 2025). It mentioned the neoliberal perspective, which considers privatization of education as a way to create a market for consumers to choose an educational way (Ganshorn, 2024). This literature pointed out that privatization of education has turned schools into an economic enterprise within a process of commodification and emphasized the result of the loss of public values and the fear of affecting the rights of pupils and teachers (Amaral et al., 2021). It also discussed the results of education privatization in terms of education inequalities (Janssen et al., 2024).

These phenomena, which were discussed in recent literature, of marketization, the loss of public values, and the fear of affecting rights, raise the need to

apply public law norms in situations of privatization to safeguard public values and human rights. Nevertheless, the literature on education privatization has not thoroughly discussed the specific impacts of privatization on the application of public law and constitutional rights, and the different approaches possible. Moreover, the literature on privatization of education has not yet discussed the notion of hybrid governance (Johnson & Vakkuri, 2017; Vakkuri et al., 2025).

The chapter intends to fill the gap in the literature and focus on hybrid governance in the field of education. The chapter presents a new theoretical framework to understand the shift from direct state-led education provision toward hybrid governance models. It specifically examines how public law norms and constitutional rights can be extended to private and hybrid entities in the education sector. In this respect, the chapter presents a new notion of educational hybrid governance. Educational hybrid governance represents a shift from the direct provision of education by state authorities to new modes in which education is provided by various actors, including corporations, NGOs, and public-private partnerships, due to privatization and other arrangements of granting the authority to provide education to various organizations and non-state actors. In this vein, the chapter discusses the intersection of hybrid theory and different dimensions of the concept of publicness and its relation to public law, which have not been previously discussed. Utilizing publicness theory, as presented by Bozeman (1994), this chapter aims to explore various characteristics of organizations within the field of privatized education. The chapter focuses on the interaction of publicness theory and the concept of hybrid governance. It describes a certain view of publicness associated with a socio-legal perspective and the issue of classifying hybrid organizations and the question of whether they fall under public law.

The chapter presents a new comparative perspective and an introduction of a new typology. By juxtaposing two regulatory approaches – the liberal regulatory approach and the operational regulatory approach, – the chapter develops a new typology based on the degree of publicness of educational organizations. Through a comparative analysis of American and Israeli jurisprudence, it illustrates how different legal traditions address issues associated with the privatization of education.

2.7 Conclusion

Hybrid governance arrangements and the supply of public services by private organizations raise concerns over infringement of human rights by non-state actors carrying out public services and neglecting public values.

The chapter focuses on the role that courts play within national regulatory governance frameworks in the age of hybrid governance via the extension of public law norms and constitutional rights to non-state actors within educational hybrid governance settings.

The chapter presents two approaches: the liberal regulatory approach and the operational regulatory approach. The former tends to preserve the dichotomy between public and private and refrains from a vast application of public law norms on private entities, whereas the latter is a comprehensive approach according to which the public-private divide should be rejected or limited.

The chapter compares American and Israeli jurisprudence as two distinct examples of these different approaches and presents a typology of organizations in the privatized education arena with different degrees of publicness.

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3 Privatization through Neoliberal Bureaucratization and the Redefinition of Public Values in Paraguayan Education

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Abstract

This chapter explores the intersection of privatization and state transformation in Paraguay's education system, using the theoretical frameworks of dimensional publicness and neoliberal bureaucratization. It argues that privatization is not a simple withdrawal of the state but a reconfiguration of governance that embeds private norms and logics into public institutions. Through an analysis of Paraguay's hybrid governance structures, particularly the Fund for Educational and Research Excellence (FEEI) and the Programs and Projects Executing Unit (UEPP), the chapter examines how historical authoritarian legacies and structural inertia shape public-private dynamics. Drawing on interviews with key stakeholders and extensive document analysis, the findings illustrate how neoliberal bureaucratic mechanisms redefine public values such as equity, accountability, and inclusion. This case highlights the complex and context-specific nature of privatization, challenging binary distinctions between public and private, and emphasizing the importance of historical and political contexts in shaping education reforms. The chapter concludes by discussing the implications of these findings for understanding state capacity, democratic governance, and the contested meaning of publicness.

3.1 Introduction

The blurring boundaries between public and private governance call for renewed scrutiny of how privatization transforms state structures and challenges the very notion of public values. Far from being a straightforward process of state withdrawal, privatization often manifests as a reconfiguration of governance, where private actors, norms, and logics are embedded within state institutions. In this regard, Béatrice Hibou's concept of "neoliberal bureaucratization" offers a provocative lens for understanding privatization as a mode of state adaptation. Hibou argues that

Far from being economically disempowered, the State needs to adapt not only to external constraints, but also to internal ones. This adaptation takes the form of the privatization of the State itself, a privatization that is not so much a loss of control, but more so a choice of indirect governance, using private intermediaries on an incremental scale. (Hibou, 2015, p. xviii)

This perspective challenges the conventional dichotomy between public and private, suggesting that privatization is better understood as a negotiation over authority rather than a relinquishment of it.

Once the modern state role model for Latin American countries in the second half of the 19th century, Paraguay's more recent history offers a compelling and understudied case to explore these dynamics. Since the second half of the 20th century, the country's education system has been shaped by authoritarian legacies, entrenched clientelist practices, and a structural inertia of a largely unchanged bureaucratic apparatus (Velázquez, 2017). These historical conditions complicate efforts to define the "publicness" of education provision and policymaking and set the stage for hybrid governance structures that blend public and private elements. In recent years, such arrangements have become increasingly prominent. And while these developments are framed as solutions to inefficiency and mismanagement, they raise deeper questions about whose interests are prioritized, how authority is distributed, and what values underpin decision-making processes (Elías & Portillo, 2020).

The concept of publicness, as articulated in dimensional publicness theory (Bozeman, 2013; Moulton, 2009), provides a useful framework for analyzing these phenomena. Rather than categorizing organizations as strictly public or private, dimensional publicness theory examines how varying degrees of political and economic authority shape organizational behavior and policy outcomes. This approach highlights the fluid and negotiated nature of public-

ness, which is continually redefined through interactions between state and non-state actors. By situating these insights alongside Hibou's notion of neoliberal bureaucratization, this chapter opens a conversation about the ways in which privatization not only reconfigures governance but also reshapes the meaning of public values such as equity, accountability, and inclusion.

Methodologically, the study follows a qualitative approach integrating different instruments and data sources that enabled triangulation to enhance the validity and depth of the findings (Rubin, 2021). Data for our insights come from in-depth interviews conducted in Paraguay in 2022 with 47 representatives from various education stakeholder groups, including government officials (14), civil society organizations (8), teacher unions (3), international organizations (3), research institutions (7), and other school-level stakeholders (12). Additionally, the study incorporates insights from relevant literature and document analysis. A search of scholarly publications focused on the case of Paraguay provided a comprehensive overview of existing academic research and helped identify key actors and institutions for the interviews. Supplementary documents were accessed through online searches and contributions from participants, who shared materials referenced during the interviews.

In examining the case of Paraguay, this chapter seeks to contribute to broader debates about the implications of privatization for state capacity and democratic governance. It raises critical questions about the extent to which privatization reinforces or challenges existing power dynamics, particularly in contexts where the boundaries between public and private have always been porous. By drawing attention to the historical and structural factors that shape these processes, the analysis aims to move beyond simplistic narratives of state retreat or market dominance, instead emphasizing the complex and context-specific ways in which privatization unfolds.

This chapter is structured as follows. First, it situates the analysis within the theoretical frameworks of dimensional publicness and neoliberal bureaucratization, outlining how these perspectives inform the study of privatization and state transformation. Second, it provides a historical overview of Paraguay's education system, tracing the legacies of authoritarianism and structural inertia that have shaped contemporary governance practices. The third section presents the findings, focusing on two key processes of neoliberal bureaucratization: the creation of the Fund for Educational and Research Excellence (FEEI) and the establishment of the Programs and Projects Executing Unit (UEPP). These processes illustrate how hybrid governance structures operate. Finally, the discussion reflects on the broader implications of these developments, emphasizing the need to reconsider the evolving relationship between publicness, privatization, and state capacity.

3.2 Publicness and Neoliberal Bureaucratization

We situate our analysis within the broader theoretical conversation about publicness and privatization, drawing on and integrating different perspectives to explore the evolving dynamics of governance. Traditional distinctions between public and private organizations have proven insufficient for understanding the complex interplay of authority, values, and institutional arrangements that shape contemporary policy outcomes. Instead, theories of publicness – particularly dimensional publicness – offer a more nuanced framework for examining how political, economic, and cultural forces interact within hybrid systems of governance. By combining insights from dimensional publicness theory, neo-institutional approaches, and critical perspectives on neoliberal privatization, this framework aims to illuminate how organizations navigate shifting configurations of authority and value, especially in contexts where public and private boundaries have been historically and structurally blurred. With this lens in mind, we propose that privatization should be understood not as a rupture with past practices, but as an iterative process embedded in longstanding governance traditions and sociopolitical legacies.

Dimensional publicness theory challenges the binary classification of organizations as purely “public” or “private,” and instead frames their degree of publicness along two axes of authority: political and economic (Bozeman, 1984; 1987). Political authority entails the directives, mandates, and regulatory frameworks imposed by the public sector, which guide organizational actions by enforcing compliance, allocating resources, and embedding public priorities. Economic authority, by contrast, reflects an organization’s autonomy to respond to market signals such as consumer preferences, competitive pressures, and cost considerations. While strong political authority emphasizes public control and constraints, strong economic authority allows organizations to prioritize market efficiency and revenue generation. At one extreme, decision-making is shaped predominantly by political mandates, leaving little room for market logic, whereas at the other, market imperatives drive decisions with minimal political interference.

Bozeman represented these dual forces through a “publicness grid,” a two-dimensional space positioning organizations according to their relative exposure to political and economic authority. No entity is free from either influence and, as policies evolve, funding shifts, or alliances change, an organization’s coordinates on this grid may move. Thus, dimensional publicness emphasizes that what we consider “public” or “private” is constantly renegoti-

ated as political priorities, economic conditions, and organizational strategies interact with and transform one another.

Building on this foundation, and informed by neo-institutional theory (Scott, 2001), Moulton (2009) argues that publicness cannot be measured solely by formal structures like funding sources or the locus of regulatory power. Instead, publicness hinges on whether organizations achieve outcomes aligned with public values – what she calls “realized publicness.” Realized publicness requires navigating “public value institutions,” which Moulton categorizes into (a) *regulative* institutions, reliant on legally sanctioned rules and compliance; (b) *associative* institutions, emerging from professional networks and community norms; and (c) *cultural cognitive* institutions, rooted in shared beliefs and taken-for-granted assumptions. Together, these institutions shape how organizations move toward – or away from – public value.

Similarly, Anderson (2012) proposed an integrated publicness framework by combining *core*, *dimensional*, and *normative* forms of publicness. *Core publicness* involves formal attributes such as legal status or ownership structure, establishing a baseline of public or private affiliation. *Dimensional publicness*, drawing on Bozeman’s work, focuses on how political and economic authorities shape action as mentioned above. Indicators like “resource publicness” – i.e., dependence on government funding – or “communications publicness” – i.e., interactions with government officials – quantify these influences. *Normative publicness*, building on Moulton (2009), considers how public service values – equity, accountability¹, or accessible services – are embedded in organizational objectives.

Altogether, the dimensional publicness frameworks move beyond categorizing organizations to examine their behavior in terms of publicness. The goal is not merely to place organizations along a political-economic axis, but to understand how the distribution of authority, combined with formal structures and ingrained public values, translates into public service objectives and tangible outputs. These approaches acknowledge that organizations may be constrained by high levels of both political and economic pressures simultaneously, and these pressures need not be inversely related. Even within the same institution, different units or activities may operate under distinct patterns of influence. Likewise, seemingly similar organizations may generate strikingly

1 While Moulton (2009) includes accountability as a normative public value, it is important to note that the term has taken on contested meanings in the field of education. In particular, accountability has often been associated with neoliberal reform agendas emphasizing performance measurement, standardization, and managerial oversight. This framing departs significantly from earlier conceptions centered on democratic responsiveness or public deliberation.

different outcomes depending on how they integrate, navigate, or resist these forces.

Putting the dimensional publicness perspective in conversation with the work of Hibou on neoliberalism and privatization proves valuable. It sheds light on how political and economic authority operate under neoliberal regimes, revealing the nuanced ways in which privatization reshapes the public-private divide by embedding market logics within public institutions and governance structures. While dimensional publicness theory provides tools to understand how political and economic forces interact, and how diverse values inform outcomes, Hibou (2004, 2015) emphasizes that these forces and values are themselves embedded in longstanding governance patterns. Privatization, in her view, is not simply an outcome of global market ideologies or an uncomplicated result of state withdrawal. Rather, it emerges through a complex interplay of actors, institutions, and historical processes. To be sure, it does not necessarily indicate a retreat of the state; rather, it can function as an indirect mode of governance, enlisting private intermediaries within networks of loyalty, patronage, and informal negotiation. In such contexts, reforms presented as neoliberal innovations often represent contemporary adaptations of longstanding governance practices that have historically blurred the boundaries between public and private spheres.

Most relevant for this chapter, Hibou's notion of "neoliberal bureaucratization" highlights that privatization often reshapes state structures rather than dismantling them. By infusing administrative processes with contractual logics, performance metrics, and standardized indicators, privatization redefines the rules of the game without necessarily delivering on its promises, such as increasing accountability or clarifying objectives. Such hybrid bureaucracies can reinforce existing power relations and limit the articulation of public interests. This understanding complements the idea of realized publicness and its emphasis on public value outcomes, by illuminating how the institutions guiding these outcomes – regulative, associative, and cultural cognitive – are themselves grounded in political histories and evolving social agreements.

When dimensional publicness theory is considered alongside the concept of neoliberal bureaucratization, a more contextually nuanced lens emerges for examining privatization in the public sector. From this perspective, instead of interpreting privatization as an external imposition or a contemporary anomaly, it appears as an adaptive strategy embedded in national histories and political cultures. Although there are attempts to quantify publicness (e.g., Gutiérrez et al., 2023), we use here the conceptual categories of dimensional publicness – political and economic authority, core structures, and multiple types of public value institutions – as heuristic tools rather than fixed meas-

ures. Moreover, Hibou's insights ensure that these categories remain sensitive to local contexts, reminding us that how organizations respond to these influences depends on inherited legacies, entrenched interests, and informal bargains.

For the purposes of this study, we argue that a combined approach is particularly relevant for understanding contexts where the line between public and private has never been clearly defined. Privatization, therefore, is not viewed as the sudden imposition of global market logic onto a once-pristine public sphere but as a gradual recalibration of governance practices with deep historical roots. Rather than limiting the focus to formal structures or financial flows, we examine how cultural norms, professional networks, and implicit beliefs shape policy outcomes. Additionally, we challenge the assumption that publicness inherently implies direct state control, instead emphasizing the dynamic interplay of authority, market forces, and negotiated values that define what constitutes "publicness" across different times and settings.

3.3 Continuity and Change in Paraguayan Education Policy: Authoritarian Legacies and Redistributive Challenges

This section examines the historical and political trajectory of Paraguay's education system, focusing on the shifts from authoritarianism to the challenges of democratic governance. We begin by analyzing the recent struggle over the allocation of resources during the final years of the Lugo government (2008-2012), focusing on the contentious renegotiation of the Itaipú treaty and its implications for education policy and redistribution. It then traces the origins of these persistent challenges back to the Stroessner dictatorship (1954-1989), highlighting how authoritarian practices and structural inertia have shaped the state's approach to education and governance over time. For additional insights, see the larger study from which this chapter derives (Moschetti et al., 2023).

3.3.1 *From Opportunity to Conflict: Itaipú and the Recent Struggle Over Education Policy*

After decades of political continuity under the dominance of the Colorado Party (1948-2008), Fernando Lugo's presidential candidacy in 2008 was a major milestone in Paraguayan political history. As several authors point out, there are at least three elements that made the 2008 election crucial in Paraguayan history: it constituted the first defeat of the Colorado Party after 61 years in

control of executive power, it was only the third time in 130 years with a government not headed by the Colorado Party (ANR) or the Liberal Party (PLRA), and it was the first political party shift in government held in democracy (Pangrazio, 2008; Uharte Pozas, 2009; Bourscheid & Stumpf, 2019, Elías & Portillo, 2020). As explained by Bourscheid and Stumpf (2019), the victory of Lugo's Patriotic Alliance for Change (APC) in 2008 was the result of high expectations for political and social change.

In the realm of education policy, Lugo's government sparked high expectations for meaningful transformation. The expansion of access to compulsory education – particularly at ECE and secondary level – and the improvement in working conditions for teachers constituted the main promises of a new government that set out to “reverse the historical social debt with the excluded sectors” (Vuyk, 2017, p. 90). The transformations materialized fundamentally through regulations concerning free education and a greater allocation of resources for schools (Molinier, 2016). Since the enactment of the law on free early childhood and secondary education in 2010 (Law No. 4088), a system of direct transfers to schools was also established to compensate for the funds that the schools would no longer receive from families in compliance with the new regulations on gratuity (Molinier, 2016).

During this period, implementing education policy with structural changes proved highly challenging. This difficulty arose from the entrenched inertia of a state bureaucratic apparatus that had remained largely unchanged for an extended period. As Lafuente (2009) states, “the political change [implied] also a change in the administration and management of the Ministry of Education” (p. 69). The transition was far from smooth. The new government approached the ministerial apparatus with distrust, viewing it as a remnant of the dictatorship. This perception was shaped by the clientelist and prebendary practices that had characterized its operations since that era. As a result, the Lugo government cancelled most of the programs and projects promoted so far by the World Bank, the Inter-American Development Bank and other organizations. Only some of them were maintained, especially those with a clearly redistributive aim. In these cases, however, their scope and visibility were reduced, as was the case with the *Escuela Viva* program, “aimed at strengthening schooling in rural environments, native communities and urban-marginal areas of the country” (Researcher_1). The most significant aspect here is that these changes were primarily driven by the elimination of the Projects Coordination Units (PCUs). These structures, often regarded as a “parallel ministry,” played a prominent role until their dissolution around 2008.

Despite the rather reactive nature and lack of specificity that characterized the educational policy agenda of Lugo's government, the most consequential

development in education was, paradoxically, an event seemingly unrelated to the sector: the renegotiation of the Itaipú Binational Dam treaty with Brazil, a critical agreement concerning one of the world's largest producers of hydroelectric energy.

However, it would not be the government in charge of the renegotiation who would eventually see the benefits of such negotiations. Originally signed in 1973 as part of an agreement between military dictatorships, the Itaipú Treaty imposed conditions that were profoundly disadvantageous for Paraguay, which was obliged to cede unused energy to Brazil in exchange for monetary compensation far below market values.² The renegotiation of the treaty had been one of the main campaign proposals of the APC government, which had questioned the criteria that had governed the economic exploitation of the dam since its inauguration in 1984 for their unfairness. Upon taking office as head of the new government in 2008, Lugo prioritized the renegotiation (Vuyk, 2017) and, despite the fact that the renegotiation would imply a loss of benefits for Brazil, the regional integration agenda promoted by Luiz Inácio Lula da Silva, president of Brazil at the time, created a window of opportunity favorable to the new Paraguayan position.

Although the funds from the renegotiation of the Itaipú Treaty would not be available to Paraguay until 2012, the three years following the signing of the so-called Lula-Lugo agreement were marked by intense internal disputes over how the money should be allocated. This conflict played a significant role – though not exclusively – in reshaping the political landscape. Within a year of the signing of the treaty, the APC disintegrated, leading to the formation of the *Frente Guasú* as a new political party. At the same time, the Liberal Party shifted its stance, aligning itself with opposing positions in the debate over the treaty's funds. As Elías and Portillo (2020) explain, the debate that ensued after the renegotiation of the treaty revolved fundamentally around the need to “shield” the use of the funds coming from the Itaipú hydroelectric plant so that “they would not be used for rigid state expenditures such as salaries and debt payments, but rather as investment and development funds” (p. 212).

In spite of having a common general objective, two different proposals, presented by two antagonistic coalitions, gained weight. On the one hand, the *Frente Guasú* government proposed the creation of the National Economic Development Fund (FONDES) to allocate the funds from the renegotiation of the Itaipú Treaty. According to a representative of a civil society organization (CivilSociety_3), FONDES aimed to address historical social debts by directing

2 For a detailed account of the circumstances under which the Itaipu Treaty was signed and the conditions and operating rules imposed by it, see Reale (1974) and Gwynn (2019).

resources toward key areas such as agrarian reform, education, housing, and healthcare. The proposal was supported by various political sectors, primarily those linked to the *Frente Guasú*, as well as a broad range of social movements, including former Itaipú workers, campesino groups, labor unions, and student associations. It was a legislative project with significant backing from grass-roots supporters of the government at the time.

On the other side of the debate over the allocation of Itaipú funds, the group *AhoraPy* emerged as a counterproposal to the FONDES initiative. *AhoraPy* was composed of representatives from non-governmental organizations focused on education, prominent journalists, and key figures from the business sector. As noted by Elías and Portillo (2020), *AhoraPy*'s launch coincided with the creation of *Juntos por la Educación*, an organization made up of business leaders, think tanks, and philanthropic organizations that functions as a political lobbying group, similar to others operating in the region, aiming to influence government education policies (Edwards et al., 2021; Moschetti et al., 2024).³

Leveraging the active participation of well-known journalists and financial backing from *Juntos por la Educación*, *AhoraPy* gained significant media visibility to advocate for its proposal. Initially, the group sought to allocate 100% of the funds from Itaipú to strengthen investment in education. However, through internal negotiations and discussions with political actors who opposed the FONDES proposal, *AhoraPy* adjusted its plan to allocate 60% of the funds to education, prioritizing infrastructure, teacher training, technology (particularly providing laptops), research, and scholarships. To safeguard these resources, the group proposed creating a trust fund controlled by an external body, with representation from other ministries and the private sector, ensuring that funds would be managed independently of the Ministry of Education (MEC).

The clash between the two funding models and the ensuing negotiations continued until the final months of Lugo's presidency, culminating in his removal from office in June 2012. With Federico Franco (Liberal Party) assuming the presidency, the proposal backed by *AhoraPy* and *Juntos por la Educación* was swiftly approved, albeit with modifications, under the name *Fund for Excellence in Education and Research* (FEEI, by its Spanish acronym). This fund, exclusively

3 These organizations participate in the Latin American Network for Education (*Red Latinoamericana por la Educación*, REDUCA). The member organizations are: EducAR 2050 Project (Argentina); *Fundación Empresarios por la Educación - ExE* (Colombia); *Fundación Educación 2020* (Chile); *Fundación Empresarial para el Desarrollo Educativo - Fepade* (El Salvador); *Grupo FARO* (Ecuador); *Empresarios por la Educación* (Guatemala); *Fundación Educativa Ricardo Ernesto Maduro Andreu - Ferema* (Honduras); *Mexicanos Primero* (Mexico); *Unidos por la Educación* (Panama); *Asociación Empresarios por la Educación* (Peru); and *EDUCA* (Dominican Republic) (see Moreira Martins, 2019).

designated for education and research, became part of the broader National Fund for Public Investment and Development (FONACIDE, in Spanish)⁴, which consolidated all additional resources from Itaipú. With this, the government of Federico Franco, the subsequent Colorado Party governments and the traditional economic sectors were the ones who finally capitalized on the renegotiation of the Itaipú Treaty.

3.3.2 *Tracing the Limits of Serving the Public Good through Educational Reform*

The Paraguayan military dictatorship led by Alfredo Stroessner for 34 years was the longest in South America. The implications of the dictatorship have been immense and persistent for the construction and functioning of the state apparatus. As an example, education in Stroessner's time was characterized by sharp vertical control through the Ministry of Education over teachers, propaganda focused on legitimizing the regime and fear of repression (Elías & Segovia, 2011; Rivarola, 2000; Soler, Elías & Portillo, 2015). At its conclusion, particularly in the early years, the democratic transition in Paraguay was characterized by the military's leadership, the permanence of the same political party in power (the PC), and the very limited participation of the opposition in the transition process (Bourscheid & Stumpf, 2019).

Against this context, however, educational reform was widely seen as a cornerstone for modernizing and democratizing the state in the aftermath of the dictatorship. The reform was indeed one of the primary initiatives undertaken by the democratic government in the first half of the 1990s, together with the new constitution approved in 1992, which required the allocation of at least 20% of the annual public budget to education (Zarza & Suárez, 2020). As some authors comment, in the context of the democratic transition, there was deep confidence in democracy and, in particular, high expectations for education. This educational reform, which eventually materialized in the Education Law of 1998, had as its main objectives a pedagogical updating of the system towards a less teacher-centered model, the reduction of illiteracy, the incorporation of the Guaraní language in schooling (following the recognition of the right to learn in the mother tongue), and the expansion of public education provision (Ortiz, 2012).

4 The period between 2012 and 2016 was characterized by a notable participation of private actors in the creation and legitimization of the so-called "FONACIDE Law," which in turn incorporated the creation of the Fund for Excellence in Education and Research (FEEI). Through the organization *Juntos por la Educación* and in alliance with the most important media in the country, the private sector advocated not only for the economic resources resulting from the renegotiation of the Itaipu Treaty be invested in education, but also for a greater involvement in the decisions from that moment onwards.

However, despite significant transformations in the country's education system – such as the expansion of public education coverage and the introduction of mandatory education through ninth grade – the results fell far short of their initial goals. Beyond the anticipated changes promised by the reform, some actors criticized the persistence of structural elements of the Paraguayan state that remained untouched during the transition to democracy. In this context, one interviewed researcher and political analyst remarked:

They decided not to touch Stroessner's economic structure, not to address land issues, not to challenge the export model, and to claim that education would democratize. "No, let's change education because the problem is an authoritarian culture, and people are accustomed to *caudillismo*."⁵ This discourse, philosophically speaking, was idealistic about education: "I can change mindsets without addressing material conditions." That was the rhetoric of the reform, and everyone bought into it, except for a sector that had been involved in the struggle against the dictatorship, namely the campesino sector, which pushed for the recovery of lands appropriated by the dictatorship. [...] In this sense, the reform was, in my personal view, a distraction for many people, an avoidance of truly contentious debates. Thus, the MEC remains a tool for that [Colorado] sector, building its base of support. (Researcher_4)

This scholar's words highlight critical deficiencies of the reform: its discursive rather than material nature in a context of low public investment in education.

Along this vein, to understand the outcomes of the educational reform and other recent dynamics, it is essential to revisit the functioning of the MEC during the dictatorship period. Numerous scholars point to the education system's use as a tool for ideological and social control during Paraguay's dictatorship (Elías & Segovia, 2011; Velázquez, 2019). During Stroessner's regime, two educational reforms occurred in 1957 and 1973, both supported by international organizations, especially the U.S. government through USAID (Flecha et al., 1993). Beyond the pedagogical changes these reforms meant to introduce, internal controls of the regime, self-legitimizing propaganda, and the context

5 *Caudillismo* refers to a tradition of personalist political leadership in which power is concentrated in a single figure—the *caudillo*—whose legitimacy often stems from personal loyalty, patronage networks, and claims to represent popular will. While frequently associated with authoritarianism, *caudillismo* has also been interpreted as a response to weak institutions and as a vehicle for political inclusion and social cohesion in contexts of state formation, even when exercised at the expense of formal institutional frameworks (see, e.g., Taylor-Robinson, 2006).

of severe repression significantly constrained their implementation. (Rivarola, 2000)

In this vein, both academics and government officials interviewed described the MEC as “a powerful instrument of Stroessner’s politics [and] a key organ of the dictatorship’s control system” (Researcher_5) and as “an appendage of the Colorado Party, the ruling party, and a tool for political control” (Government_6). To maintain ideological control over teachers, the regime employed various mechanisms, including the creation in 1962 of the only teacher union permitted at the time, the pro-government *Paraguayan Educators Federation* (FEP). This organization, formed with the adhesion of local educators’ associations, public-sector teachers, and MEC officials, was widely perceived as an entity aligned with the Colorado Party and contributing to the regime’s authoritarian control (Fundação Konrad Adenauer, 2009). The union system, which imposed mandatory membership on all teachers, made dissent or opposition to the regime’s educational directives extremely difficult. As a high-ranking government official explained:

The teaching sector was heavily oppressed by the dictatorship, co-opted and, to some extent, militarized. They even intended to take this further when Stroessner’s regime fell. Within the educational system, there operated what was known as the GAA – Anti-Communist Action Group – comprising supervisors, directors, and leaders of the educational system, all members of the Colorado Party, trained in anti-communist strategies in Taiwan. That was the tone of the system. (Government_6)

The use of the MEC as a control organ under the dictatorship instilled a culture of hierarchy, authoritarianism, and fear, which became institutionalized and shaped the ministry’s operations. This authoritarian legacy, combined with structural deficits in the public education system, had significant implications for educational reform in the 1990s. While the reform rhetorically proposed path-breaking changes, “there was an entrenched hierarchical culture in the MEC” (Government_10), which hindered meaningful implementation. As another government official noted, “The reform adopted innovative ideas, but the ministry itself lacked the capacity to lead, and it was a complete disaster. Practices continued unchanged, almost exactly as before” (Government_6).

These entrenched practices, established during the dictatorship, remain evident today. One interviewee explained:

A significant portion of the teaching profession does not feel part of the Ministry of Education. Yes and no. They see it more as a boss, a control-

ler, rather than their own ministry, one that could help them collaborate. Because the ministry itself doesn't encourage collaboration, saying, "Look, here's what lies ahead – let's work together!" No, instead, there are directives, some even favorable, like creating a management team in each educational institution with representatives from teachers, parents, and students. But these initiatives aren't implemented. And why? Because even the principal is afraid to implement them. Authoritarianism is ingrained. Authoritarianism and fear. (Researcher_6)

The historical trajectory outlined above underscores the deeply ingrained of practices and structures within the Paraguayan state that prioritize private (i.e., personal) and elite interests over the public good. Whether under the authoritarianism of the Stroessner regime, the inertia of the post-transition period, or the ambitious yet constrained reforms of the Lugo government, the state apparatus has consistently operated in ways that reinforce existing power dynamics. While Lugo's administration attempted to disrupt this trajectory by challenging well-established practices and proposing redistributive policies, the underlying structures proved resilient. In the findings section, next, we examine how this persistent inertia has been reshaped in recent years under the guise of neoliberal bureaucratization, where state functions continue to favor private interests. This shift represents a transformation rather than a rupture, demonstrating the continuity of a state apparatus that remains fundamentally misaligned with the public good.

3.4 Findings: Updating Private Values through Neoliberal Bureaucratization

In this section, we present the main findings of the research, focusing on developments in Paraguay's education system during the post-Lugo era. Specifically, we analyze how the concept of neoliberal bureaucracy has taken root through two significant mechanisms: the Fund for Educational and Research Excellence (FEEI) and the creation of the Programs and Projects Executing Unit (UEPP). These developments illustrate how bureaucratic structures in the education sector have increasingly incorporated norms, arrangements, and formalities characteristic of the business world. We argue that this trend reflects a historical and ongoing erosion of the boundaries between public and private governance, which reshapes the management and implementation of educational policies.

3.4.1 The Creation of the FEEL: Public Funds Shielded from the State

The debate over the allocation of funds resulting from the renegotiation of the Itaipú Treaty, initiated during the final years of Lugo's administration, extended into the early months of Federico Franco's transitional government (2012–2013). With the proponents of the FONDES project removed from office, the proposal championed by the *AhoraPy* platform and the organization *Juntos por la Educación* quickly gained momentum, forming the basis of Law No. 4758/2012, which established the aforementioned National Fund for Public Investment and Development (FONACIDE). This marked the beginning of a period in which private actors began to exert more direct influence over education policy discussions in Paraguay. Through *Juntos por la Educación*, and in alliance with the country's most prominent media outlets, private sector leaders advocated not only for "shielding" the Itaipú funds from inclusion in the budget to cover regular or recurring education expenses but also for their deeper involvement in decision-making processes moving forward. As one academic explained:

The reality is that the business sector got involved [in the FONACIDE proposal] for two reasons: one ideological – "we can't leave education in the hands of a leftist government because it would jeopardize our interests as business leaders." The other was, precisely, the compensation funds from Brazil [from which they wanted to benefit]. So the business leaders then pushed for the bill to allocate 100% of the funds to education. (Researcher_1)

Other stakeholders, including civil society organizations, unions, academics, and officials from the Ministry also echo this interpretation, as illustrated in the following quote:

Business leaders realized that unless they intervened directly, not just as a power behind the scenes but as part of the political structure shaping education decisions, their interests might be at risk. [...] They presented themselves to the public as key contributors in terms of funding to address historical structural weaknesses of the education system. (Government_1)

The importance of "shielding" funds became central to the creation of FONACIDE. The term dominated media headlines and debates, evolving into an argument endorsed by a wide array of actors. The aim was twofold: first, to

ensure the Itaipú resources were allocated to education; and, second, that they were managed by a semi-autonomous, public-private organization, so that they would not be arbitrarily used by the MEC, which was “perceived as clientelist and corrupt” (Government_12). The involvement of business leaders and, particularly, of influential media outlets lent significant legitimacy to the proposal in the eyes of the public opinion. As one academic noted, the proposal to shield the funds “established the narrative that the MEC was corrupt, that it was politically compromised, so the funds had to be shielded and placed under the control of neutral technocrats free from political interference” (Researcher_4).

However, the final version of the FONACIDE Law diverged from the original proposal by *AhoraPy*. During congressional deliberations, the funds were divided into multiple allocations, with education as only one of the beneficiary areas. Despite this, private sector representatives were invited to participate in this discussion and were actively involved in drafting the legislation. According to one private sector representative who was directly involved in this process, municipalities and regional governments were “particularly determined in demanding their share of the Itaipú funds,” as decentralized entities had historically received a significant portion of these resources as royalties (Civil Society_1). These actors perceived *AhoraPy*’s original proposal as a loss of funding for their territories (Civil Society_1).

After an intense but relatively short debate, the final version of Law No. 4758/2012 established FONACIDE and outlined the following distribution of funds: 30% for the newly created Fund for Educational and Research Excellence (FEEI); 28% to the National Treasury for infrastructure programs and projects; 25% to local and regional governments; 10% to the National Health Fund; and 7% to the capitalization of the Financial Development Agency. In the struggle over the allocation of these funds, a requirement was added for subnational administrations to invest in educational infrastructure and school meals. This sparked criticism from certain union leaders, which argued that “if there is a governing body responsible for education [i.e., the MEC], it should be managing these funds” (Union_1). This criticism, echoed by other groups, did not gain traction in the debate, from which unions were virtually excluded. For the *AhoraPy* platform, by contrast, it was clear that ensuring the funds would not be diverted to cover operational expenses required removing them from the MEC’s purview altogether.

Although the FONACIDE Law was passed in 2012, its budget was not available until 2014. In 2013, following the transitional government led by the PLRA, the *Partido Colorado* returned to power with Horacio Cartes as president. The Cartes administration (2013–2018) was characterized by “a clear agenda for the Ministry of Education, [...] centered on quality assurance, evaluation, and

New Public Management” (Researcher_5). During part of this period, Marta Lafuente, one of Paraguay’s most experienced and authoritative voices in education, led the Ministry of Education (2013–2016). It was also during this time that FEEI began its operations.

Two elements distinguish FEEI as a new and special structure. First, the allocation of these funds dedicated to education and research is predetermined by law: FEEI must distribute its budget among specific categories, including ICT in education (30%), research and development (20%), school infrastructure and equipment (15%), early childhood education (10%), university scholarships (10%), teacher training (10%), school cooperation networks (3%), and educational quality evaluation (2%) (Molinier, 2016).

Second, as an independent body from the MEC, FEEI’s decision-making and organizational structure includes both public and private actors and consists of a Governing Council and a Technical Committee. The Governing Council is composed of five voting members: the Minister of Finance – who, notably, chairs the fund despite its focus on education –, the Minister of Education, the Minister of Public Health and Social Welfare, the Executive Secretary of the Technical Planning Secretariat, and the President of the National Council of Science and Technology (CONACYT).

In addition to these public representatives, the Governing Council also includes four primary representatives from “civil society” and four alternates, who replace primary representatives when necessary. These civil society representatives, however, have a voice but no vote. According to the law, these representatives must be “individuals of recognized moral integrity, with experience in the field of education, and involved in projects supported or implemented by the private sector”, in addition to being “appointed by the President of the Republic upon the recommendation of CONACYT” for a renewable three-year term (Law No. 4758/2012).

The Technical Committee, on the other hand, comprises the executive leadership and the technical staff. This committee was created ad hoc by the FONACIDE Law and is responsible for supporting, monitoring, and evaluating approved projects. While the Governing Council approves projects for funding, the Technical Committee oversees their implementation.

The public-private governance structure of the FEEI is arguably its most distinctive feature and has not been without controversy. This structure has sparked two contradictory interpretations. On one hand, some stakeholders close to the FEEI – such as (former) Governing Council members and individuals associated with *AhoraPy* – view the public-private composition of the Governing Council as a source of legitimacy. According to some interpretations, private sector representatives on the council do not represent “individual

or institutional interests” but rather “all of Paraguay” (Researcher_2). This perspective, which is not a minority view among interviewees and the general public, reflects the degree to which the involvement of the private sector has been normalized as a guarantee of transparency in the management of public funds.

However, other actors have criticized the appointment process for private sector representatives to FEEI’s Governing Council, arguing that it lacks transparency and is driven by criteria more related to influence than to technical merit:

FEEI is composed of the most influential groups tied to the media, civil society organizations with influence, and business groups. Those are the criteria; the criteria are not educational but rather individuals with prestige in the economic or business sector [...] seen as providing assurance for the proper management of funds. (Civil Society_7)

Similarly, other interviewees, including representatives of international organizations and academics, emphasize that there is no genuine representation of civil society within the Governing Council:

FEEI is made up of private sector individuals; there has never been, for example, a single union representative on the Council. Instead, it includes representatives of the private sector, as well as journalists who hold a highly partial view of the education system and its core issues. (International Organization_1)

FEEI is essentially composed of influential business leaders and journalists closely aligned with major corporate media outlets. [...] They adhere to a specific political line or vision of education; this is how FEEI is structured. (Researcher_5)

From this perspective, some interviewees are highly critical of FEEI’s establishment as a public-private governance body, arguing that “the creation of the FEEI did not shield funds [from the operating budget for] education, but rather [made them available] for particular interests that are neither relevant nor appropriate for Paraguay’s education system” (International Organization_1). In this context, the allocation of four seats on FEEI’s Governing Council to representatives of “civil society” – broadly and flexibly defined – appears to have been a strategic move by the government in 2012 to confer democratic legitimacy while, in practice, placing control of FEEI’s funds in the hands of the country’s most powerful business leaders.

This mechanism for funding education highlights the essence of neoliberal bureaucracy. Its hybrid structure, dominated by private-sector influence under the guise of public-private collaboration, reflects a shift toward indirect governance mechanisms.

3.4.2 *A Parallel Ministry: The Programs and Projects Executing Unit*

The establishment of the FEEI brought significant changes to the Ministry of Education. Regarding financing, the emergence of the FEEI gradually displaced the international funding that the MEC had traditionally relied on – historically the primary source of investment project funding in the country. By 2017, FEEI accounted for 75% of the MEC’s external funding (Juntos por la Educación, 2019). Under this new financing model, FEEI operates “like a bank” (Researcher_2), requiring the MEC to design projects and submit them for approval to the FEEI Governing Council, which decides whether to approve – and therefore fund – or reject them. In other words, the MEC now needs to apply for funding for *public* education through a Council that includes formal representation from the private sector.

Beyond changing the source of investment funds, FEEI produced two fundamental effects on the MEC: a clear reduction in its autonomy to decide investment priorities and a redefinition of its operational structure. As noted earlier, the pre-defined investment priorities of the FEEI, outlined in Article 12 of Law No. 4758/2012, forced the MEC to fragment educational policy into projects that aligned with the legally mandated resource allocation. A ministry official illustrated how the FEEI’s creation posed a significant challenge for the MEC:

[The emergence of the FEEI] forced the Ministry to be very creative in project design. [...] The FONACIDE Law forced the Ministry to do the opposite of what public policy demands, meaning to fragment its programs instead of having a strategic action framework like our National Education Plan. This required extra effort because we had to finance public policy through specific projects. (Government_6)

Additionally, the project-based financing model – previously unfamiliar to the MEC – necessitated the creation in 2015 of a dedicated unit to manage FEEI-funded projects, from their inception to execution. This unit, the Programs and Projects Executing Unit (UEPP), was modeled after the Project Coordination Units (PCUs) that had managed externally funded projects in the 2000s. The UEPP became “a new organizational entity within the Ministry, specifi-

cally designed to centrally manage all programs and projects funded by the FEEI” and, at least formally, “reports directly to the Minister, like a sort of *mini-ministry*” (Government_5). Analysts also view UEPP as “a super-directorate within the MEC” (Researcher_1).

Initially, projects were assigned to Vice Ministries and Directorates based on thematic alignment – e.g., standardized evaluation projects were allocated to the Planning Directorate. This added responsibilities to the Directorates and revealed MEC’s technical and administrative weaknesses in handling complex projects and the requirements of the FEEI for how projects should be managed, so the UEPP was perceived as necessary at the beginning. A ministry official recounted:

This situation caused a bottleneck that we couldn’t get out of. In the Planning Directorate, they would say, “I don’t have a project manager; I need a project manager. Where do we get one? We don’t know.” Then on the administrative and financial side: “I don’t have a budgeting specialist,” because we had to do reprogramming and work with the Ministry of Finance. Then, “I need a financial specialist, a budgeting specialist...” This created a demand for professionals that didn’t exist. So, in 2015, we said, “No, this cannot go on like this.” (Government_5)

To address these challenges, the MEC, the Ministry of Finance, and the FEEI Technical Committee convened to draft a decree consolidating the management of all MEC programs and projects within a single structure. However, skepticism arose within the MEC regarding the creation of the UEPP, particularly in what was described as “a conservative and highly centralized Ministry. [...] It was like a unit with superpowers, so it generated widespread resistance” (Government_5). This skepticism stemmed partly from UEPP’s broad mandate to manage all resources used for investment expenditures (i.e., non-recurring, capital expenditures) for the MEC, including those coming from the FEEI and other external sources.

While UEPP staff describe the unit as a support mechanism for Vice Ministries and Directorates, claiming it “relieves them of administrative and documentation tasks” (Government_5) and does not dictate policy, in practice, UEPP plays a far more central role. Throughout the process the MEC must follow to request funding from the FEEI, UEPP is responsible, first, for designing each project and aligning them with institutional mandates – functioning as the key driver of project development rather than merely an administrative support unit. Second, for a project to succeed and secure funding from the FEEI, UEPP staff must, informally

meet with each [FEEI Governing Council] member to walk them through every detail: what the project is, how it will work, when and why it's needed, what resources are involved, how the costs were calculated, the implementation plan, the evaluation timeline, and the audit schedule. That's essentially the approval process for a new project, and a similar but simplified version applies when reformulating existing ones. (Government_5)

The UEPP has thus become the main communication channel between the MEC and the FEEI. The unit is “the hinge between the FEEI and the MEC” (Government_5), responsible for coordinating the meetings between the two entities. More specifically, the relationship between the FEEI Technical Committee and UEPP is central to their communication, as these teams are uniquely equipped to navigate the technical and bureaucratic complexities of FEEI's funding processes. In this context, UEPP has emerged as a highly autonomous body within the Ministry – formally dependent on the Minister, yet more stable than the Minister and, importantly, culturally closer to FEEI's Technical Committee and Governing Council.

Furthermore, UEPP plays a pivotal role as a bridge between non-state entities and FEEI funding, facilitating access to resources that would otherwise be unavailable to these organizations. While the FONACIDE Law limits FEEI funding to state entities, the UEPP leverages MEC's ability to fund non-state organizations to navigate this restriction. Acting as an intermediary, the UEPP designs projects on behalf of non-state entities, submits them to the FEEI for approval, and, upon securing funding, channels the resources to these organizations. As one official explained: “The UEPP creates the project, submits it for FEEI approval, FEEI approves it, and then the MEC, through the UEPP, can subcontract NGOs, etc.” (Government_5). This process allows non-state organizations to indirectly benefit from FEEI funding while adhering to the formal legal framework.

Given MEC's budgetary constraints, which allocates almost all funding to operational expenses, the FEEI has become a critical element, serving as the primary source of funding for investment in innovative initiatives. In a sense, and in the words of a former MEC official, “the effect of the FEEI has been to displace and strip the MEC of its tutelage” (Government_12). From this perspective, and as argued by Elías and Portillo (2020), “the creation of the FEEI [...] points to privatization as part of a structural reform of the state, where decisions on educational policy are primarily made within the Fund's Governing Council, with the Ministry of Education playing a weak institutional role” (pp. 219–220).

Not surprisingly, proponents of the FEEI view this transfer of functions positively, as they believe the MEC lacks the capacity to lead educational policies. In their view, the Ministry is “trapped in its own bureaucracy, dealing with problems, unions, and crumbling schools... there’s no one thinking outside the box, no one with a vision, someone asking: ‘Wait a moment, where are we headed?’” (CivilSociety_6). As previously noted, they see FEEI’s public-private governance model as a promising long-term approach with valuable contributions from “civil society” i.e., private actors:

It’s a different model from a very interesting perspective, because there is public-private participation where various civil society actors are involved in trying to shape public policies. This makes it more sustainable as a national policy rather than a government policy, which is one of the critical problems we face. (Researcher_3)

Some FEEI supporters go even further to argue that it is the only institution capable of leading Paraguay’s education policy:

In a country lacking both public and state policies, the only way to sustain an idea is to rely on a dedicated group that persistently advocates for it with successive ministers. Without such continuity, one minister may steer policy in one direction, only for the next to take it in another. The absence of a clear vision, state policy, plan, or guiding framework leads to this inconsistency. This is where an entity like the FEEI proves invaluable. (Civil Society_8)

However, other actors are more critical of the creation of the FEEI, its public-private governance model, and its project-based funding approach. These critiques generally center around two main points. First, FEEI’s knowledge of the education system has been called into question, with critics arguing that it is ill-equipped to produce certain policies due to a lack of expertise. As one former government official noted, “the implications of investment and, above all, the quality of spending require a level of expertise that extends far beyond a peripheral understanding of the education system.” (Government_15). The fact that the FEEI manages investment funds for which the MEC must compete creates a situation in which “the MEC is subordinated to the FEEI” (Researcher_6). In particular, “FEEI sets the policy by controlling the funds for programs and projects. The minister or the Ministry is essentially managing very basic issues” (Researcher_5). Some argue that the FEEI has diminished MEC’s political authority, effectively taking on the role of public policy pro-

ducer. As a ministry official observed, “The FEEI has essentially become the Ministry of Education in the sense that, by deciding what it funds and what it doesn’t, it formulates education policy” (Government_1). Similarly, a union representative asserted, “The FEEI has become a parallel Ministry” (Union_1).

The second criticism highlights the lack of consistency in education policy since the creation of the FEEI. While the FEEI has assumed leadership of the government’s education policy through project funding, this does not make it inherently suitable to oversee the education sector. In fact, some international observers argue that FEEI’s project-based financing model—legally restricted to specific themes—has resulted in a fragmented and incoherent education policy. This fragmentation is often driven by particular interests which do not necessarily align with MEC’s plans or goals. As one Governing Council member explained regarding a program funded by the FEEI:

With [one of the flagship programs] we... well, *I* spearheaded it, but let’s say “we”... from my position, we began advocating for it about six years ago, presenting it as a key issue. From there, it evolved into a project, making it a collaborative effort. Of course, it’s a topic managed by the public sector. What we do is allocate resources, monitor the process, and encourage its implementation. (Civil Society_8)

Overall, this section exemplifies neoliberal bureaucracy by showing how the creation of the UEPP and its relationship with the FEEI reshapes public governance. The UEPP’s role as both a project producer and mediator between the MEC and the FEEI reflects a shift away from public autonomy toward a model where public policy is fragmented into competitive, project-based initiatives dictated by external criteria. The influence of private actors within this framework introduces not only a new set of rules and practices but also reflects the increasing entanglement of public and private interests, where decision-making power is redistributed in ways that challenge traditional notions of state accountability.

3.5 Discussion and Conclusion

This chapter has shown that privatization in Paraguay emerges not as an external imposition – whether from abroad or outside the public sector – but rather as a response to the state’s own internal constraints. What we see is a shift to intermediaries that bridge the public and private realms, and do so in ways that control the processes and resources in and through which

innovation and change occurs. The cases of FEEI and UEPP have shown how this has happened in Paraguay following the infusion of new funding that resulted from the Itaipú treaty renegotiation. At the national level, private actors resolved that those funds would neither be controlled nor absorbed by the traditional MEC bureaucracy, capitalizing on widespread perceptions of inefficiency and corruption rooted in the Stroessner era and the domination of the government by similarly self-serving party officials and their networks, to the detriment of education access and quality for the children of Paraguay. Notably, this move was less a democratizing effort than a strategic attempt to gain influence and control, leveraging a moment of institutional discredit to advance private interests under the guise of reform.

In the language of Bozeman's (1984) dimensional publicness theory, Paraguay reflects a lessening of political authority, in that the control of the public sector has waned, and an increase in economic authority, in that the structures and processes of decision-making around resource allocation and project management and evaluation are overseen by business-oriented private actors driven by competitive pressures and profit considerations. Just as Bozeman asserts, one outcome of this situation is that what we consider "public" or "private" is constantly renegotiated as political priorities, economic conditions, and organizational strategies interact with and transform one another.

The case of Paraguay also connects with the work of Moulton (2009) on public value institutions. Interestingly, however, Paraguay shows that public value institutions can be compromised or undermined. That is, when the professional networks (an associative institution) of private actors shape beliefs (a cognitive cultural institution) that work against "realized publicness," they (professional networks) can transform the legally sanctioned rules (regulative institutions) that guide the system and, in so doing, can insert their own community norms into the decision-making and governance processes. Put differently, not only are Moulton's (2009) three dimensions of publicness interconnected, but one (associative institutions) can affect the others (cultural and regulative institutions), for example, through the strategic activity of professional networks who are influential within the political, economic, and communications (i.e., media) spheres.

One long-term question for reflection has to do with how the distribution of authority is affected by the historical and evolving political-economic context. As discussed earlier, authors writing on publicness acknowledge that organizations may be constrained by high levels of both political and economic pressures. This has certainly been the case in Paraguay. The shift away from publicness has not been accidental: the redistributive and equity-focused reform proposals put forward by President Lugo during 2008-2012 were not

palatable to vested economic interests in the country, and he was subsequently removed. In the ensuing years, with leftward policies politically impossible, the only direction to move was rightward. Within this context, the model of privatization represented by FEEI and UEPP can be seen as motivated not only (or not even) by a desire for efficiency and transparency, but rather by a desire on the part of business and economic elites to control the distribution and management of government resources.

We close by echoing Hibou's (2004, 2015) observation that privatization often represents continuity with the past rather than a break from standard operating procedures. The evolution in recent years in Paraguay is that the beneficiaries are located outside rather than inside the state. Whereas historically the Paraguayan state was oriented and animated by the interests of its long-standing dictator (Stroessner) and his networks, the present conjuncture reflects a similar dynamic with the difference being that the center of gravity – politically, economically, and culturally (in terms of media) speaking – has shifted to actors who explicitly represent private organizations. In both cases, however, it can be argued that the underlying ethos of the system is one guided by privatization in the sense that profit for oneself and the interests, organizations, and networks they represent is the guiding concern, rather than an abstract or altruistic notion of the public good, let alone more nuanced dimensions of publicness (see Edwards et al., 2025). The time period between the end of the Stroessner regime and the ousting of President Lugo was not sufficient for the development of a stable, independent bureaucratic structure that represents the interests of the public. Given the direction of education governance in Paraguay documented in this chapter, it is unclear how or when this kind of outcome can be achieved.

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4 Public-Private Entanglements and Educational Privatization: Towards a Global Theory of the Role of Philanthropic Foundations

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Abstract

This chapter analyses the global influence of philanthropic foundations in education, with the aim of understanding how philanthropy foundations contribute to new forms of educational policy privatization and the blurring of public-private boundaries in contemporary educational systems. Although a growing body of literature documents the roles of edu-philanthropy, particularly in Global North countries, there is limited theorization linking philanthropic action to institutional, cultural, and political legacies. Drawing on a scoping review of 162 academic publications (2000–2024), this work aims to develop a global theory by challenging Northern-centric assumptions and incorporating evidence from underrepresented regions, especially the Global South countries. The analysis identifies the globalizing nature of “new philanthropy” which employs remarkably similar strategies worldwide, including funding research, media positioning, and building public-private networks, to advance market-based ideas like standardization and accountability. Additionally, results show how philanthropic actors proceed as a “double privatizing agent,” eroding public-private distinctions and creating conditions for other private actors to operate in educational systems. Finally, the study finds that philanthropic roles vary across political-administrative

regimes: while Anglo-American contexts often focus on charter schools and high-level investment, contexts in the Global South (e.g., BRICS and Latin America) are characterized by philanthropy filling state capacity gaps through Public-Private Partnerships (PPPs) and promoting endogenous forms of privatization amid deep social inequalities. This comparative approach provides vital insights for understanding the transnational reconfiguration of education governance and the role of edu-philanthropy.

4.1 Introduction

Since the late 1990s, several authors have shown that the process of educational privatization has not only involved the privatization of educational provision or the replication of managerial logics in educational processes (Ball & Youdell, 2008; Edwards et al., 2025) but is also marked by what Ball (2009) called new forms of privatization of educational policy. This involves the growing influence of non-state actors – such as philanthropic foundations, Big Tech, NGOs, and international organizations – in shaping educational policy agendas, policy design, and implementation. This dynamic increasingly contributes to shaping school systems and redefining governance structures and reform processes (Srivastava & Walford, 2016).

In this context, philanthropic foundations have been highlighted as key actors in the privatization of educational policy. This is shown in a growing number of studies, especially over the last decade, spanning countries as diverse as Brazil (Avelar & Ball, 2018; Tarlau & Moeller, 2020), the United Kingdom (Olmedo, 2014), Australia (Lubienski et al., 2016), the United States (Reckhow & Snyder, 2014), Argentina (Matovich & Cardini, 2019), and the Dominican Republic (Edwards et al., 2021). Overall, the literature has shown that philanthropic foundations have at least three main roles in contemporary educational systems: i) a transformation of functions historically associated with the public and the State; ii) the creation of private consortia and alliances to influence policy, and iii) the coordination of public-private networks (Fontdevila et al., 2022), thereby reshaping public-private boundaries.

Although these investigations have significantly advanced our understanding of philanthropic roles in education, there is limited theorization on how institutional, educational, and political factors shape the presence and actions of philanthropic foundations. This chapter aims to take the first steps to develop a global theory linking philanthropic foundations' modes of action to the institutional, cultural, and political legacies shaping contemporary educational systems. It seeks to answer three guiding questions: Which phil-

anthropic foundations influence current education systems globally? What are their main strategies and effects? And how do these intersect with the broader contexts in which they operate?

Unlike other studies, often centered on English-speaking countries, we approach education systems as part of a world system marked by structural inequalities between the Global North and South¹ (Wallerstein, 1976; Milanovic, 2016). Our aim is not to theorize solely about the South, but to challenge Northern-centric assumptions by incorporating evidence from underrepresented regions. A global theory of educational privatization, we argue, must account for these structural differences. To this end, and unlike case studies focused on national perspectives (Ball, 2019; Avelar et al., 2018; Rowe, 2022), we aim to identify shared patterns and key contextual distinctions through an inductive-comparative approach.

To achieve these objectives, the chapter draws on a scoping review of 162 academic publications produced between 2000 and 2024, carried out as part of a broader research project on philanthropy and education governance in contemporary educational systems. The review followed the stages outlined by Xiao and Watson (2019), incorporating detailed procedures at each phase to ensure analytical coherence. Searches were conducted in Scopus and Web of Science using targeted keywords and complemented by snowballing and backward citation.² The selection included peer-reviewed articles, books, and book chapters, including both empirical and theoretical academic texts, such as conceptual essays or works grounded in critical traditions like critical pedagogy, when they engaged substantively with the role of philanthropic actors in educational systems published in English, Spanish, and Portuguese, based on their relevance, analytical depth, and geographical diversity.

The final corpus was analyzed in two stages: first, by extracting general information from each text (e.g., authorship, objectives, methods, conclusions), and second, by applying a thematic analysis (Braun & Clarke, 2021) across five core

1 Following Womersley et al. (2015), the idea of the Global South – which differentiates it from other concepts such as “Third World” or “Developing World” – is based on a division that highlights the inequalities of wealth globally. It seeks to rescue the political, economic, and cultural differences of the countries located at the “center” and those at the “periphery” of global geopolitics. Of course, this division is metaphorical, and many countries may fall between both groups, but this central distinction allows us to understand the dynamics of contemporary societies.

2 The database search combined the terms “philanthropy,” “education policy,” “politics of education,” “school governance,” “educational governance,” and “school.” The strategy focused on titles, abstracts, and keywords, and was limited to social sciences and education.

dimensions of interest³. While the review technique served as the main method for identifying and organizing the literature, this chapter does not present a classical systematic literature review. Instead, we use the selected literature as a source of data to support a critical and theoretically informed reflection on the role of philanthropic actors in contemporary education systems. The time frame (2000–2024) was defined after an initial exploratory search that included materials from 1980 onwards, which revealed only a limited number of relevant publications prior to 2000. We therefore focused on the period where research on philanthropy in education became more consolidated.

In synthesis, the chapter seeks to contribute to the broader discussion on public-private relations in education by analyzing patterns that connect political-administrative regimes with the forms of philanthropic intervention, shedding light on current governance trends and the lesser-known forms of privatization shaping educational policy today. Likewise, the chapter seeks to understand the global role of philanthropy in educational systems, elucidating how these actors differ from other non-state private actors.

The chapter is organized into four parts. First, we provide a conceptual overview of the relationship between the State, philanthropy, and the provision of education, emphasizing the problems posed by the participation of corporate actors in the design and meaning of the public sphere. Next, we examine how different political-administrative regimes and education system characteristics mediate philanthropy's role in educational privatization. Based on this, we present our main findings, in two sections: the first one analyses the global patterns and relations between political-institutional regimes and edu-philanthropy; and the second focused on describe the specific dynamics in underexplored regions such as Latin America and the BRICS.⁴ Finally, we offer some concluding reflections on the changing nature of educational governance and outline future lines of research.

3 These five dimensions of interest were: (i) Types of philanthropic actors – organizational/legal forms and economic nature (e.g., foundations, corporations, hybrid models); (ii) Scales of operation – levels at which philanthropic action takes place (global, national, subnational, school); (iii) Mechanisms of action – channels of influence such as funding, networking, or advocacy; (iv) Spheres of influence – educational domains targeted (e.g., curriculum, accountability); and (v) Effects on school systems – changes generated by philanthropic interventions (e.g., structural, pedagogical, or perceptual effects).

4 Founded in 2001, the BRICS alliance presents itself as a power bloc to moderate the hegemony of the United States and Western Europe in decision-making and setting the global agenda. The BRICS are comprised of Brazil (B), Russia (R), India (I), China (C), and, since 2012, South Africa (S) (Thompson & De Wet, 2017).

4.2 Philanthropy, the State and Public Goods: A Complex and Opaque Relationship

Since the decline of the Keynesian welfare state and the rise of liberal democracies, public-private relations have been reshaped. As Rhodes (1994) argues, this transformation involves a de-governmentalization of the State, where policymaking is no longer monopolized by governments but distributed across a wider range of actors. Over the past three decades, organizations such as international agencies, corporations, NGOs, and think tanks have become key policy players, working alongside the State through new coordination and resource-sharing models (Fontdevila et al., 2022; Mundy & Verger, 2015; Jessop, 2011), increasingly blurring the line between public and private.

In this landscape, philanthropic foundations have emerged as prominent non-state actors in education. These entities span a wide variety of organizations, ranging from traditional family foundations to Corporate Social Responsibility (CSR) firms, impact investors, and social enterprises (Srivastava & Read, 2019). While some pursue for-profit objectives (Srivastava & Baur, 2016), others operate with civic motives, engaging in charitable activities, community outreach, and funding educational programs through donations and grants (Hogan & Williamson, 2023).

Despite their diversity, philanthropic foundations operate between the public and private sectors. While philanthropy has historically referred to “acts of human kindness,” recent decades have seen the rise of organized models that go beyond charitable giving (Reich et al., 2016; Katz, 2007). Known as new, venture, or strategic philanthropy, this model emphasizes high-risk investments with measurable social returns (Miller, 2015), aligning philanthropic action with logics of private investment, profitability and performance. Foundations such as the Gates Foundation exemplify this shift, favoring efficiency, impact, and scalability, contributing to the erosion of traditional public-private boundaries (Saltman, 2010). This overlap raises important governance questions about transparency, accountability, and the aims of education. Furthermore, new philanthropy leverages not only financial resources but also intellectual capital (e.g., mentoring, consulting) and social capital (e.g., networks, marketing), consciously merging profitability, public impact, and social development (Olmedo, 2019; Komljenovic et al., 2023).

Beyond complicating the distinction between public and private, the involvement of philanthropic foundations in socially oriented activities is problematic for democracy and the achievement of public goods, such as education. Although philanthropic activity can contribute to important causes and

complement the state action, philanthropy understood as a form of economic and cultural power “can run counter to the fundamental requirement in a democracy that the public agenda is subject to popular direction and control” (Sievers, 2010, p. 387). In many parts of the world, the legal architecture that underpins grant-making activity transforms philanthropy into diffuse and grey entities in the face of public scrutiny. While some countries, such as Australia (Hogan & Williamson, 2023) and China (Tsang et al., 2024), have adopted regulatory frameworks for philanthropic action in education, foundations operating under the model of new philanthropy – both in the Global North and South – often face minimal accountability requirements. That is, they are not obliged to disclose representative activities; the definition of social purpose remains donor-controlled; and their work can be subsidized through tax exemptions (Reich et al., 2016). In parallel, the financial dependence of some states on the generation of public goods (Olmedo, 2017, p. 79) or the technopolitical capacity of (large) philanthropies to support educational initiatives (Kornhaber et al., 2017) has the potential to displace broader, democratic deliberation about social purposes and public responsibilities for education. While some advocates portray philanthropic action as an expression of “value pluralism” inherent to liberal democracy – that is, the coexistence of diverse voices beyond the State (Sievers, 2010) – liberal perspectives often underplay the inherent tensions involved in constructing public goods through private interest (Saltman, 2010). As such, the ceding of control of public policy to private actors such as philanthropists may not only deepen the well-known consequences of market segmentation but also undermine the professional autonomy and rights of teachers, as well as the local control of communities over their schools.

For all these reasons, it is perhaps unsurprising that philanthropic foundations frequently operate through public-private partnerships (PPPs), a governance scheme widely promoted in education in recent decades. According to Verger (2012), PPPs involve contractual arrangements between public and private actors (including philanthropies) aimed at solving apparently urgent educational problems through market-based solutions. These arrangements often adopt business-oriented methods such as risk assessment, competition, school choice, and performance-based accountability. In this context, philanthropies have partnered with public institutions to develop and commercialize educational solutions intended to mitigate fiscal constraints in low-income countries and enhance educational outcomes. These initiatives include the construction of low-cost schools (Srivastava & Baur, 2016), the procurement of textbooks, the implementation of high-stakes school management models, and the provision of technology-driven educational platforms (Villalobos et al., 2024).

As Olmedo (2019) argues, PPPs involving philanthropic and private actors are not only structured to address state deficiencies but also express a broader logic of alignment with market values. Patil and Reiser (2021) have shown that philanthropic foundations have designed legal vehicles for the superimposition of private over public interest, which include the creation of socially responsible corporations. According to the authors, these organizational forms, which are widespread in Brazil and India, may be “merely refashioned marketing efforts or product or market development programs” (Patil & Reiser, 2021, p. 33). Sports companies such as Nike have sponsored specific physical education programs to associate them with physical activity and health in Africa, however, these activities have been aimed at installing sports products and creating “consumers for life” (Uhlenbrock & Meier, 2021, p. 558).

In summary, the growing entanglement between philanthropic foundations and public education – manifested in the blurring of public-private boundaries, the opacity of philanthropic governance, and the consolidation of PPPs – reflects the increasing centrality of philanthropy in the global education agenda.

4.3 Political-Administrative Regimes and Educational Models: A Bottom-Up Classification

To understand how philanthropy operates differently across contexts, it is essential to consider the mediating role of political-administrative regimes and education systems. Existing literature on the role of philanthropy has notably contributed to gain a better understanding of its effects on blurring the public-private distinction in the provision of public goods. Nevertheless, literature has often neglected the mediating role of meso-level variables such as the political-administrative regimes and the characteristics of national education systems as variables when analyzing the enactment and effects of philanthropic actions. Consequently, when analyzing the development of PPPs, it is imperative to start from the premise that they do not occur in a vacuum but develop within specific socio-historical contexts and are mediated by cultural and economic factors, as well as by traditions and political-administrative configurations (Verger et al., 2019), which may favor or hinder the fluidity of public-private relations and the influence of the private sector in policymaking processes and in the provision of public services.

Various typologies have been developed to systematize political-administrative traditions and their effects on education reform trajectories (Ongaro, 2010; Painter & Peters, 2010a, 2010b; Pollitt & Bouckaert, 2004; Verger et al.,

2019). Drawing on these frameworks – and especially on works by Bleiklie and Michelsen (2017), Verger et al. (2019), and Voisin and Dumay (2020) – we propose a heuristic classification of seven general regulatory contexts: i) Anglo-American, ii) Latin American, iii) BRICS; iv) Confucian, v) Nordic, vi) Continental European, and vii) Napoleonic. This typology allows us to examine how philanthropic interventions articulate with distinct models of state organization, regulatory frameworks, and educational governance.

The Anglo-American model, present since the 1970s in countries such as England, the United States, Australia, and New Zealand is characterized by the promotion of reforms and education systems informed by market values. These reforms have encouraged, among other, the managerial governance of schools (endogenous privatization) as well as the expansion of private provision (exogenous privatization) (Ball & Youdell, 2008; Hursh, 2005). Moreover, under this model, the boundaries between the State and civil society have been increasingly blurred (Bleiklie & Michelsen, 2017), due to a growing involvement of private actors and values.

Even though some Latin American countries exhibit similarities with the Anglo-American tradition (specially Chile), we treat them as a separate category given their distinct historical-political legacies, lower levels of economic development, and different legal and regulatory frameworks (Edwards et al., 2001; Mendoza & Vernis, 2007). In countries like Argentina, Ecuador, Honduras or Colombia, the imposition of structural adjustment policies during the 1980s and 1990s led to a shrinking of the state apparatus, often within low-institutional-capacity contexts. This process enabled the substitution of state functions by private actors and, in some cases, the emergence of “new populisms” (Carrión & Korman, 2023), as Shiroma (2014) shows.

Although they represent different political and administrative traditions (including countries of different continents), a third group of countries are BRICS. BRICS comprises leading emerging economies, representing 42% of the global population and 25.7% of the world’s GDP, and constitutes an alliance that seeks to dispute the hegemonic political power, under the idea of global multilateralism (Thompson & de Wet, 2017), emphasizing sustainable development and equity in education and other sectors (Dervin & Zajda, 2015). Additionally, BRICS features commonly highlighted characteristics, such as strong state involvement in education, growing private investment, and increasing participation in global education networks. In sum, BRICS are part of the Global South, but they differ strongly from most countries in Latin America, Asia and Africa.

The fourth group, the Confucian model, present in East Asian countries such Japan, Vietnam, Mongolia or Korea is characterized by strong state

authority and bureaucratic continuity. The State plays a central role in regulating education, maintaining clear boundaries with the private sector and prioritizing practical skills, professional accountability, and centralized curricular orientations (Parcerisa et al., 2022; Ma & Marquis, 2022). This model contrasts with others in its emphasis on control and coordination rather than market mechanisms, as Tsang et al. (2024) show illustratively.

The Nordic and Continental European models are associated with universalist welfare states and stronger public sector leadership in education policy. In some Nordic countries, such as Denmark and Norway, reforms have often sought to reinforce State oversight of decentralized systems, while cautiously experimenting with quasi-market elements such as school choice (Møller & Skedsmo, 2013; Verger et al., 2016). Nevertheless, within this group, different paths can be observed: for instance, Sweden's adoption aggressive voucher system (state subsidies to private schools based on enrolled students) contrasts with Finland's resistance to privatization, particularly considering the high performance demonstrated by its public education system in assessments such as PISA.

The Continental model, which includes countries such as Germany and Austria, features federal state structures and well-established mechanisms for dialogue between state and non-state actors. Educational reforms within this model emphasize school autonomy, quality assurance, and, in some cases, non-punitive accountability mechanisms (Thiel et al., 2017), often drawing on traditions of cooperation and corporatism.

Finally, the Napoleonic model, which includes Southern European countries such as Spain, Italy, and Portugal, is characterized by centralized governance and limited success in the implementation of reforms. Efforts to modernize public services have often lacked sufficient political and financial support, resulting in erratic or partial trajectories (Verger et al., 2019). Despite the historical presence of public-private arrangements – such as publicly funded private schools in Spain – non-state participation in governance continues to face skepticism, as it is perceived as a challenge to state authority (Peters, 2008). However, the expansion of network governance models may be gradually shifting this dynamic.

4.4 Trends and Patterns of Edu-Philanthropy across Political and Educational Regimes: A Brief Overview

Drawing on the typology of political-administrative regimes presented in the previous section, this section organizes the findings of the literature review to identify trends and patterns in philanthropic action across different governance contexts.

As expected, most academic research (including empirical and theoretical papers) on edu-philanthropy has emerged from Global North countries, particularly those with an Anglo-American tradition, accounting for 122 of the 162 references. Similar to previous research (see Fontdevila et al., 2022), the U.S. stands out as the most extensively studied case (N=84), followed by the United Kingdom (N=15) and Australia (N=16). To a lesser extent, research has also addressed New Zealand (N=3) and Canada (N=2) (albeit as a comparison with England).⁵ Academic production in UK, Australia and New Zealand began with early works by Stephen Ball and James Ferris, both published in 2008.

The second largest cluster of research focuses on BRICS countries, with 18 references identified. Within our sample, Brazil (N=10) and India (N=5) emerge as the most studied cases and will be analyzed in more detail in the following section. Two references to China and one article focused on South Africa appear with less centrality. Most of these studies are relatively recent, beginning in Brazil in 2018, and extending to India in 2019.

A third cluster includes studies on Continental European Countries, especially Germany (N=6) and Sweden (N=2), with most research adopting a comparative lens. Following a similar approach, research on the Napoleonic countries is mainly focused on Spain (N=3), and to a lesser extent Portugal (N=2) and Italy (N=1). Finally, we found evidence in Latin American countries (N=6), such as Argentina, Dominican Republic and Mexico, and examples from other Global South countries, like Zimbabwe (N=3), Bangladesh (N=1), and Uganda (N=1).

Finally, regarding the Confucian countries, their low representation in the sample (with one reference excluding the Chinese references – Adhikary & Lin-

5 It is interesting that, in general, the research is localized in a single country, with some exceptions. For example, when the United States is the main country on which the research is focused, in only two cases is a comparison made, one of them with Liberia (former colony) and another with India (with one of its researchers of origin from that country).

gard, 2018 regarding Bangladesh) do not allow for a comprehensive analysis of this group.⁶

This distribution allows us to identify some recurring trends and distinctions across policy regimes, synthesized in Table 4.1. In the case of the Anglo-American countries, the influence of Ball's work (Ball, 2008; Ball & Junemann, 2012; Grimaldi & Ball, 2021) and his development of the network ethnography method is evident (see Rowe, 2024 for this point). These investigations have made it possible to descriptively map the magnitude and networks of relationships that exist between a small number of large philanthropic foundations, accounting for their poles of influence and their mechanisms of action, highlighting the role of discursive strategies (production of evidence, assembly of networks, among others) as one of their main forms of action mobilized to influence the education policy debate. Other authors, following this methodological line, have shown how foundations tend to provide support to the same organizations (Reckhow & Snyder, 2014). Scott (2009), for his part, focused on the influence of venture philanthropy as a sociopolitical force in the promotion of charter schools in the U.S. The author showed how philanthropic organizations have used the production of evidence and its dissemination as a mechanism of influence. The Australian research, although more recent, has provided novel evidence to show how venture philanthropy has enhanced the role of intermediary organizations in the framework of public education policymaking (Rowe, 2022). Rowe (2022) highlights the role of Social Ventures Australia in shaping national reforms by strategically positioning three key initiatives: School Plus, Evidence for Learning, and AERO. A notable distinction is that, unlike the U.S., Australia does not permit direct donations to departments or schools (Hogan & Williamson, 2023)⁷.

Another significant strategy involves establishing a presence in the media as experts, leveraging their positioning to influence public opinion and policy discussions (see, for example, DeBray et al., 2019). Finally, a common characteristic of this research is the focus on what Ball (2019) calls "big players," such as the Bill and Melinda Gates Foundation, the Walton Family Foundation, the Michael and Susan Dell Foundation, the Broad Foundation, among other organizations that have large budgets and operations across the globe, often

6 This absence could reflect the linguistic scope of the search strategy, which was conducted in English, Spanish, and Portuguese. This criterion may have excluded relevant academic production in other languages – particularly from East Asia – and therefore limits the comprehensiveness of the analysis.

7 This study is particularly relevant, as it takes a different approach, mapping the reach, influence, and impact of philanthropy in public schools, arguing that, rather than large foundations, it is an intermediary organization that has the greatest influence on policymaking and public schools.

Table 4.1 Political-administrative regimes and philanthropy in education

Political-administrative regimes	Anglo-American countries	Napoleonic	Nordic & Continental European countries	BRICS	LAC and other Global South countries
Iconic philanthropy examples	• Bill and Melinda Gates Foundation • Walton Family Foundation • Pew Charitable Trust • Michael and Susan Dell Foundation • John Templeton Foundation • Carnegie Corporation • School Plus	• Edulog • EPIS • Teach for Spain		• Lehmann Institute • Todos pela Educacao • Instituto Natura • Ayrton Senna Institute • Central Square Foundation (CSF) • UNITUS • StartEdu • Faizal and Shabana Foundation (F&SF)	• Varkey Foundation • Educa • Inicia Educación • Centre for the Study of Economic and Social Reality • Eduy21 foundation
Main Topics of Research	• Network mapping of philanthropist • Privatization of education • Charter school and school choice • Governance of education	• Network mapping of philanthropist • Governance of education	• Involvement of philanthropist in community networks	• Network mapping of philanthropist • Privatization of education	• Discourses and strategies of edu-philanthropist • Mapping of the influence of private actors in policymaking
Mechanisms of Philanthropic Action	• Promotion of networks and alliances between public and private sectors • Donations and funding for programs, initiatives, and research • Media positioning as specialists	• Public-private partnerships • Leveraging of media and networks to influence policy-making • Digital education markets	• Financial sponsorship and support for projects and programs • Participation in governing boards • Participation in conferences	• Promotion of networks between public and private sectors • Donations and funding for programs, initiatives, and research • Scholarships for students • Promotion of policies or ideas • Media positioning as specialists	• Networking • Knowledge mobilization • Hybrid public-private spaces for agenda setting • For-profit consultancy • Index-creation • Evidence-based recommendations
Main Results	• Relationships between the state and “opaque” foundations with unclear boundaries	• Promotion of standardized solutions	• Coordination of state and private actors	• Privatization and commercialization of the educational system • Pro-market reforms	• Promotion of market ideas (accountability) • New governance in education

Source: Own elaboration. *Note 1:* The categories “main topics of research” and “main results” were constructed inductively through the thematic coding process. They reflect recurring patterns identified across national cases and are not derived from a predefined classification system. *Note 2:* The papers included in our sample from Continental European Countries did not explicitly identify the names of the philanthropic foundations analyzed; therefore, the corresponding cells remain blank.

funding medium to small edupreneurs in Australia (as can be seen in Rowe, 2022).

In line with these findings, research conducted in the BRICS countries reveals some convergences in the strategies used by edu-philanthropic actors. Both Brazil and India have long traditions of philanthropy, and foundations are now recognized as key players in the policymaking process (Miglani & Burch, 2020). In Brazil, for example, large, interconnected consortia such as *Todos Pela Educação* (TPE), Lemann Foundation, Natura Institute, Ayrton Senna Institute and Unibanco Institute stand out as paradigmatic examples (Avelar, 2018). Complementary, Tarlau and Moeller (2020) focus specifically on the discussion of the National Learning Standards in Brazil and the role of the Lemann Foundation, indicating that its mechanism of action focused on the production of materials, knowledge, and positioning in the media and networks (formal and informal) to achieve its approval. In India, research has been focused mainly on big actors. Ball (2019) mapped the role of what he calls serial entrepreneurs, angel investors, and the proliferation of start-ups in the educational field in India. Using the Michael and Susan Dell Foundation (MSDF) as a gateway, he argues that impact investment is changing the educational field in India by creating a sort of shadow state. Miglani and Burch (2020), on the other hand, focus on the discursive operation of two foundations – the MSDF itself in the U.S. and the CSF in India – showing how the language they propose revolves around a business logic of evidence-based solutions.

In Continental and Napoleonic countries similar patterns emerge, albeit with important variations. In Spain and Portugal, edu-philanthropists emphasize PPPs and digitalization as tools for reform, leveraging flexible networks and media influence to consolidate their role in education policymaking (Turienzo et al., 2023; Saura et al., 2021; Viseu & Carvalho, 2021). In contrast, Germany's federal structure promotes a more regulated collaboration, particularly focusing on vocational training and workforce development (Koranyi & Kolleck, 2022). Unlike their counterparts in Spain and Portugal, German edu-philanthropists engage in highly coordinated efforts with the State, aiming to align educational outcomes with labor market needs without fully privatizing core educational services. These distinctions reflect varying balances between public control and private influence across governance models.

Finally, in the case of Latin American countries (excluding Brazil) and non-BRICS Global South countries, most philanthropic foundations combine national, regional, and global influences (Varkey Foundation, Intel), which have significant political, economic, and social roots in the countries where they operate. Furthermore, the involvement of educational philanthropy is not limited to (though it includes) public-private partnerships, but also encom-

passes donations (Tsang et al., 2024), policy advocacy (de Freitas, 2018), and support for educational ventures (Ideland et al., 2020).

In summary, most research on edu-philanthropy originates in and focuses on the Global North, with more recent studies emerging in continental Europe and the Global South, particularly in BRICS countries like Brazil and India and in some Latin America countries. This focus has led to an emphasis on “big players” – well-known foundations with significant budgets and broad international reach.

4.5 Edu-Philanthropy in Global South, BRICS and Latin America

Although only a small portion of articles have focused on the Global South, recent research has sought to examine the forms of edu-philanthropy in these regions. Although few in number, critically analyzing the results of these studies is important, as it allows us to understand emerging patterns and establish new relationships. Following the previous section, we will examine the results for the BRICS countries and the Latin America countries (excluding Brazil) separately. These areas simultaneously exhibit the highest levels of philanthropic action in education from a comparative perspective (Patil & Reiser, 2021) and are characterized by weak state capacity and deep social inequalities (Peeters et al., 2024). This combination creates fertile ground for the growth of PPPs and other forms of public-private engagement, particularly in settings where public institutions struggle to meet educational needs, and philanthropic or private actors are positioned as gap fillers or innovation drivers.

In general, with a few notable exceptions – such as Srivastava’s research in India (2016) – most studies can be grouped into three main categories: i) case-specific accounts of the policy work of philanthropic foundations or corporations, such as the Lemann Foundation in Brazil (Avelar, 2023; Tarlau & Moeller, 2020) or the Varkey Foundation in Argentina (Matovich & Cardini, 2019; Matovich & Esper, 2023); ii) analysis of policy initiatives involving philanthropic actors in collaboration with other stakeholders, such as School Collaboration Model in South Africa (Gamedze & Ruiters, 2024); iii) broader studies on the role of non-state actors in the education sector, where philanthropic foundations or philanthropically funded intermediaries appear more indirectly, as seen in research on Uruguay (Moschetti et al., 2020), the Dominican Republic (Edwards et al., 2021; Caravaca et al., 2021), and China (Tsang et al., 2024).

In general, in Global South countries, there has been a noteworthy increase in the presence and involvement of philanthropic actors in the sector, along with a recent emergence of “new philanthropic” forms (see, for example Avelar, 2018). Recent studies also point to several drivers of this expansion. First, some research shows the influence of economic drivers linked to public spending levels on education as a factor that might favor the expansion of edu-philanthropy in these contexts. For instance, in India (Srivastava, 2016), inadequate public funding fuels this inclination, while in other contexts, such as the Dominican Republic (Edwards et al., 2021), increased public financing has encouraged private sector involvement in education. Second, other investigations highlight the influence of political drivers such as shifts in the government coalition in Argentina (Matovich & Cardini, 2019) or broader public sector reforms such as the privatization of social services in Brazil (Avelar, 2023). Furthermore, in countries like Mexico, critical junctures such as the COVID-19 pandemic have played a role in favoring the influence and presence of Big Tech and EdTech companies supported by national philanthropic foundations (Ramírez, 2023). Lastly, regulatory conditions – including a country’s historical openness to PPPs (Adhikary et al., 2021; Novaes et al., 2021), patterns of privatization (Moschetti et al., 2020), and the existence of legal frameworks that enable educational business development (Cassio et al., 2018) – also shape the involvement and narratives of philanthropic actors.

Moreover, the articles included in the literature review reveal a significant diversity among philanthropic actors involved in education, both across and within countries, observable in three main dimensions. First, regarding ownership, various types of organizations coexist, including family-owned foundations, corporate foundations, and both domestic and global philanthropic entities. This heterogeneity is particularly evident in countries like India (Srivastava, 2016) and Brazil, where research has examined family foundations such as the Lemann Foundation (Avelar, 2023; de Freitas, 2018; Tarlau & Moeller, 2020) and the Getúlio Vargas Foundation (Araújo & Lopes, 2019), alongside corporate actors like Intel Corporation (Santos, 2019).

Second, in terms of operating models, philanthropic actors adopt diverse approaches. These range from more traditional forms of subsidization of educational programs with a social vocation – like Instituto Impulsiona in Brazil (Novaes et al., 2021) – to more innovative schemes such as the creation of impact investment funds (e.g., Inicia Educación in the Dominican Republic, Caravaca et al., 2021), or performance-based social impact contracts like those implemented in São Paulo (Cassio et al., 2018). In India, some foundations engage in building networks of investments tied to the growing EdTech market (Ball, 2019).

Third, in terms of repertoires of action, philanthropic actors engage in a wide array of strategies. These include direct service delivery, such as teacher training programs run by the Varkey Foundation (Matovich & Esper, 2023), Instituto Impulsiona (Novaes et al., 2021), or the Lemann Foundation (Avelar, 2023); infrastructure donations (Srivastava, 2016; Tsang et al., 2024); and, to a lesser extent, involvement in private educational provision through the promotion of low-fee private schools (Srivastava, 2016). Others operate indirectly by funding intermediary organizations, as in the cases of Teach for India, which receive support from both domestic and international donors (Subramanian, 2022). Additional modalities include participation in public-private partnerships for school improvement, such as in South Africa (Gamedze & Ruiters, 2024) and India (Sahasranamam & Mitra, 2019). Moreover, some philanthropic actors are active in policy advocacy, either individually or through coalitions, as in Brazil (Avelar, 2018; de Freitas, 2018), while others engage directly in policymaking, maintaining close relations with education authorities, as in the Dominican Republic (Caravaca et al., 2021).

Based on the examined articles, the multiple actions executed by philanthropic actors are only in a few cases oriented towards exogenous forms of privatization, that is, the expansion of private provision in education through mechanisms like low-fee private schools (Srivastava, 2016). More frequently, these actors participate in the education sector as “collaborators” of the State at either the national or subnational level, with a focus on “problem-solving” or a response to perceived needs and educational deficits, both by philanthropic actors and by public authorities (Cassio et al., 2018). This role of philanthropy has also been described as part of broader edu-preneurial dynamics, in which private actors frame educational crises as business opportunities and position themselves as the most appropriate problem-solvers through managerial and technical interventions (Ideland et al., 2020). However, in doing so, philanthropic actors tend to promote public education reforms, pushing for endogenous forms of privatization as evident in their discourses and practices favoring corporate models, school autonomy and accountability, or standardization, as illustrated in a number of countries, including India (Srivastava, 2016), Brazil (Avelar & Ball, 2019) or Mexico (Ramírez, 2023). This emphasis on promoting accountability in public education systems is particularly striking when contrasted with the limited accountability obligations that philanthropic organizations themselves typically assume. As discussed in Section 2, “new philanthropy” operates largely outside formal regulatory frameworks, raising concerns about the asymmetrical expectations placed on public institutions versus private actors. Additionally, philanthropy has also facilitated the importation of curricular models or teacher policies from the Global North.

This phenomenon is shaped by the relationships between foundations or corporations with international actors, which include connections with foreign universities and players participating in the U.S. Common Core experience in the case of Getulio Vargas and Lemann Foundation in Brazil, the participation of UK experts and partners such as Ark's involvement in the design of the Collaboration School Model initiative in South Africa which was funded by private foundations, or the financing of national stakeholders participation in international events disseminating the U.S. model of science education fairs developed by Intel Corporation in Brazil.

Finally, in BRICS and Latin American countries exist a diverse array of networks that connect philanthropic actors with various stakeholders. These relationships encompass not only international partnerships – such as those with universities, experts, and other private foundations or organizations – but also significant connections with public education authorities at both national and subnational levels, depending on each country's governance framework. For example, in federal countries, philanthropic entities often establish links or agreements with both national and subnational actors, as illustrated in Argentina (Matovich & Esper, 2023) and Brazil through the case of impact projects promoted by the Sao Paulo authorities (Cassio et al., 2018). The nature of these relationships with governments varies according to the prevailing governance model of each national context. For instance, the case of China is suggested to be characterized by a more hierarchical relationships, which Tsang et al. (2024) describe as a “network government” approach, whereas the Dominican Republic is noted for exhibiting more symmetrical relations (Caravaca et al., 2021). Similarly, foundations establish direct connections with schools and their stakeholders, especially with teachers and pedagogical leaders who are represented as the main beneficiaries of philanthropic initiatives (Cassio et al., 2018; Novaes et al., 2021).

In sum, while philanthropic activity in the Global South remains underexplored compared to Global North contexts, the literature reveals a growing and increasingly diversified presence of philanthropic actors in education. These actors engage through a variety of ownership structures, operating models, and repertoires of action – from service provision and capacity building to policy advocacy and investment in educational markets. Their presence is not neutral: it reflects and amplifies broader dynamics of educational privatization, often under the guise of collaboration with the State or as responses to institutional gaps. These patterns suggest that contemporary edu-philanthropy in the Global South is not merely a local phenomenon but part of a transnational reconfiguration of education governance.

4.6 Conclusions: Towards a Global Theory of Philanthropy in Contemporary Educational Systems

This chapter analyzed the creation of public-private entanglements based on a systematic review of the literature on philanthropy in education, and with a specific focus on the differences on political-administrative regimes. In contrast to most of the academic production on philanthropy in education that has been developed in countries of the Global North, this chapter provides a novel view of the phenomenon by examining the strategies and forms of action of these types of private actors in the Global South and considering this result comparing to the Global North research. In this way, the chapter seeks to describe the global results on the role and action of edu-philanthropy, trying to link philanthropic foundations' modes of action to the institutional, cultural, and political legacies of educational systems.

Reflecting on the reviewed literature (2000–2024), we observe that the field of edu-philanthropy research has evolved through at least three distinct waves of study. The first wave was predominantly rooted in the Anglo-American tradition, characterized by foundational works (such as those by Ball and Ferris and colleagues in 2008) focused on descriptively mapping the influence of “big players” and their advocacy networks to advance market-based ideas like charter schools. A second wave emerged more recently in the Global South, marked by specific case accounts (starting in Brazil in 2018 and India in 2019). These studies, while often documenting the globalizing nature of philanthropic strategies, focused on how these actors fill state capacity gaps and promote endogenous forms of privatization within specific contexts like the BRICS and Latin America. This chapter is situated within an emerging third wave that moves beyond national case descriptions toward global theorization and comparative analysis (see Rowe, 2024 or Fontdevila et al., 2022), systematically linking philanthropic modes of action to specific political-administrative regimes and cultural legacies. Having said that, at least four key trends can be concluded from our analysis.

First, the results show the globalizing nature of new philanthropy, which has emerged as a worldwide phenomenon in all regions of the world. Despite regional differences, edu-philanthropy follows remarkably similar logics and strategies across both the Global North and South: funding and disseminating research, maintaining media presence as experts, building networks between state and non-state actors, and advancing market-based ideas – such as charter schools in the U.S. or reforms to the teaching profession in India. Common areas of engagement include the promotion of learning standards or national curricula, as evidenced in both Brazil, the UK, India, Uruguay or the U.S. In

this way, it seems that philanthropy in education is installed as a trend globally, being a phenomenon that spreads relatively independently of the tradition and culture of the educational system. In sum, philanthropic foundations are not only a new actor but also an (increasingly) central actor in the construction of contemporary educational policy.

Second, the chapter highlights how philanthropic actors are increasingly involved in policymaking processes that actively participate not only in the public education debate but also in policymaking processes, such as in the case of Brazil with the national standards-based reform (see Avelar & Ball, 2019). This allows us to rethink the current discussion on PPPs in education. Until now, the discussion on PPPs has focused primarily on describing the mechanisms of action between the State and the private sector, focusing on their outcomes and the ways in which these partnerships are built. However, there has been less study of other (more subtle and less organized) processes of interaction between the public and private sectors (de Koning, 2018), especially favored by philanthropic foundations to influence educational policy. Thus, the results show how narrow the PPP analysis frameworks are for understanding the role of philanthropic foundations in the current frameworks of educational policy, marked by an increasing blurring of the public and private spheres (Komljenovic et al., 2023).

Third, the results illustrate the variegated concepts mobilized in the study of new philanthropy in education, highlighting the language behind the cases studied: some studies call it “venture philanthropy,” others “philanthrocapi-talism” and others “risk philanthropy.” Beyond conceptual differences, all these notions agree that modern philanthropy’s main objective is to introduce the logic of investment into the educational systems (Gamedze & Ruiters, 2024). In this sense, it is not strange that much of the research highlights the rhetoric proposed by philanthropic foundations: focused on equity (Carvalho & Viseau, 2024), on the impact of their work (Reckhow, 2015), and on the interest in scaling their programs and initiatives (Ball, 2019; Komljenovic et al., 2023). Therefore, it is possible to affirm that philanthropic actors are not simply “one more non-state actor.” On the contrary, philanthropic actors constitute a double privatizing agent: on the one hand, it’s a private actor that through its influence, action, and impact in the education, erases the distinctions between public and private. But, at the same time, philanthropy actors generate the conditions for other private actors to operate in education, by demonstrating their capacity as an actor that is simultaneously concerned with private investment and the public good.

Finally, the chapter provides some clues for linking philanthropic action with the characteristics of educational systems. Thus, although there are no

clear patterns or marked trends, philanthropy plays distinct roles: while in countries with a tradition of public education, it tends to promote coordination between the public and private sectors, in countries where private education is more prominent, it tends to obscure this relationship, blurring the boundaries between the public and private sectors. At the same time, the foci appear to be different: while in Anglo-Saxon countries, philanthropy is strongly embedded in discussions about charter schools, in Latin America and the Napoleonic countries, it tends to concentrate at the level of public policy. Finally, the actions also appear to differ, with a greater role played by investment (financing, for-profit consulting) in Anglo-Saxon countries and the Global South, and with stronger networking actions in Nordic and Napoleonic countries.

Obviously, these results (and their conclusions) should be understood as a preliminary effort to understand the particularities of philanthropy as a private actor and its role in contemporary educational systems, considering the administrative and political legacies. This effort must be complemented with a research agenda, that explores more deeply how philanthropy works in Global South context, permitting increasing the knowledge on the subject in Latin America, Africa and Asia. Second, more attention should be paid to how philanthropy operates at the level of the center and the educational experience, and to the dynamics of negotiation or resistance that take place in beneficiary communities. Finally, as we have suggested, it is crucial to examine how philanthropic agendas intersect and reshape governance and the broader goals of public goods, such as education.

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5 When School Improvement Becomes a Commercial Good: An Ecological Analysis of Re-Positionings and Critical Issues

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Abstract

This chapter studies the marketization of school improvement within the broader context of neoliberal education policies, focusing on the ecosystemic changes and critical issues that accompany this shift. While the involvement of private actors in school support is well documented in Anglo-Saxon contexts – characterized by highly marketized education systems and a strong private sector presence – the Flemish Community of Belgium (Flanders) represents a different type of setting. It combines decentralized governance, school autonomy, and a robust government-subsidized non-profit sector, creating a distinctive environment for analyzing how market mechanisms intersect with public governance. The study combines two conceptual lenses – positioning theory and Trinidad's dimensions of school improvement actors' work – to analyze how the entry of for-profit actors reshapes roles, relationships, and practices within the school improvement ecosystem. We present the results of a qualitative study comprising three focus groups including school leaders, teacher leaders, and both traditional and commercial school-improvement actors. Findings reveal a hybrid ecosystem where traditional non-profit actors coexist with commercial ones, blurring public-private boundaries. This coexistence challenges the legitimacy of traditional actors, prompting reinvention and specialization in core curriculum domains, while schools navigate a competitive marketplace of improvement services.

The paper identifies three critical issues: ensuring quality in a marketized environment, fostering effective partnerships amid competition, and balancing internal leadership with external contributions. Our findings underscore the need for a quality framework and a reconsideration of what should remain “public” in this evolving school improvement ecosystem.

5.1 Introduction

In the neoliberal policy landscape, market mechanisms have found their way into various public sectors, including education. With governments embracing neoliberal agendas and emphasizing “performativity,” it is widely acknowledged that education and schools have been transformed into a quasi-marketplace. The public education sector has gradually opened to private initiatives and processes of privatization and commercialization (Ball & Youdell, 2008; Verelst et al., 2025). Commercial organizations are assuming a significant role in public school systems, and their presence is increasingly perceived as legitimate or normalized due to their acceptance by governments, educational authorities, and schools (Ranson, 2003). Education has become a lucrative market for private for-profit actors (i.e., edu-business) who may provide education in the form of private supplementary education or sell related goods and services to schools (such as textbooks, testing materials, professional development, hardware, software, and consultancy; Hogan & Thompson, 2021; Verelst et al., 2025; Verger et al., 2016).

In this chapter, we examine the marketization of school improvement support, a phenomenon commonly referred to as the “school improvement industry” (Rowan, 2006). This term describes a “group of organizations that provides schools and governing agencies with information, training, materials, and programmatic resources relevant to problems of instructional improvement” (Rowan 2002, p. 284). These school improvement actors – both individuals and organizations – play a key role in supporting schools in developing strategies for enhanced teaching, learning, and school management. They also contribute significantly to the implementation of educational reforms, such as adopting new curricula, advancing digitalization, and promoting inclusive education.

In recent years, reflecting international trends, the Flemish Community of Belgium (Flanders) has witnessed growing involvement of private actors – both non-profit and for-profit – in supporting schools and the implementation of educational policies. Among these, private for-profit providers of school (improvement) support have become increasingly prominent within

the Flemish educational landscape. Whereas pedagogical advisory services – historically embedded within the public education system and linked to the educational networks – long dominated this field, a growing number of external organizations, such as private, for-profit organisations, now offer similar services to schools. Traditionally, pedagogical advisory services operated in a non-competitive environment, serving schools within their network and combining supply-driven functions (curriculum development, teaching materials, in-service training) with demand-driven support (school coaching). However, recent policy shifts have introduced market dynamics. As a result, pedagogical advisory services now share the field with freelancers, commercial consultancy firms, and independent experts, transforming what was once a closed system into an emerging market for school improvement services.

Some scholars have argued that the liberalization and marketization of school improvement have transformed it into an object of consumption or a tradable commodity (see Serder, 2024; Simons et al., 2013). Other researchers have described how school organizations now operate within a complex “ecosystem” (Trinidad, 2023), where both traditional non-profit actors and emerging for-profit support providers coexist. The impact of commercial or edupreneurial actors (Serder, 2024) has been studied across multiple levels, including students, schools, and educational policy. On the one hand, research has identified their significant role in policy framing (problematization), solution design (prioritization), to include policy implementation and in contributing to improved school outcomes (see Coburn, 2005; Ideland et al., 2020; Peurach, 2011). On the other hand, these actors have been criticized for challenging the nature of public institutions, advancing their own political and economic agendas, introducing non-curricular content, and exacerbating educational inequities (Bulkley & Burch, 2011; Cowan et al., 2025; Trinidad, 2023). While there is substantial scholarship on the relationships between commercial actors and public education systems, less attention has been paid to the interplay between traditional and commercial school improvement actors, as well as the dynamics between these actors and schools from an ecosystem perspective – an area that holds important implications for understanding contemporary school improvement processes (see Trinidad, 2023).

The contribution of this chapter is both theoretical and empirical. We aim to advance conceptual understanding of the school improvement ecosystem by specifically investigating how the introduction of new for-profit actors into this ecosystem influences the dynamics among existing actors and how it redefines the process of school improvement. Additionally, our contribution is empirical. While the increasing growth of this “school improvement industry” (Lubienski & Perry, 2019; Peurach et al., 2019; Rowan, 2002) has been well

documented in the United States, there has been little systematic research on this topic in Flanders (Belgium). The Flemish context is an empirically rich case due to the combination of a traditionally minimally controlling government, a focus on investing in professional development rather than control, significant autonomy for schools, and the presence of a strong, government-subsidized non-profit intermediary sector (including educational umbrella organizations). However, over the past decade, policy developments have led to shifts where the government is increasingly focusing on performance. Moreover, governmental support for the intermediary sector, and more specifically for the pedagogical advisory services that depend on the educational umbrella organizations, is diminishing in favor of greater freedom and autonomy for schools.

Using a theoretical lens that combines positioning theory with a heuristic approach to examine the dimensions of school improvement actors' roles, we aim to understand how the liberalization and marketization of the school improvement sector shape the roles assumed by diverse actors and their positioning in relation to one another. We begin by outlining the Flemish educational context, including its governance structure, funding arrangements, and the traditional role of pedagogical advisory services. Next, we introduce the theoretical and conceptual framework, drawing on literature on privatization and commercialization in education, positioning theory, and Trinidad's (2023) heuristic model to analyze evolving roles and relationships among school improvement actors. The methodology section details our exploratory qualitative research design based on focus group discussions with school principals, traditional non-profit and new for-profit school improvement actors, and teacher leaders as internal school improvement actors. We then present findings on the repositioning of pedagogical advisors and schools within an increasingly hybrid and competitive landscape. Finally, the discussion addresses critical issues related to quality assurance, partnership models, and the balance between internal and external responsibility for school improvement, concluding with reflections on governance and equity in this emerging ecosystem.

5.2 Flemish Educational Context

5.2.1 *Types of Schools, Funding, and Umbrella Organizations*

To understand the specific characteristics of the Flemish educational system, it is essential to begin with its two main types of schooling: official education and

free education. Official education is organized by the government, for instance, by the Flemish Community, provinces, cities, and municipalities. Free education is organized by private individuals or organizations. Free education primarily consists of denominational schools, the largest group of which are Catholic. Additionally, there are non-denominational free schools, including various method-based schools that are not affiliated with any religion.

Moreover, the educational system is organized in three educational networks. Community education refers to public schools under the authority of the Flemish Community. Government-aided public education includes schools run by cities, municipalities, provinces, and intermunicipal associations. Government-aided private education comprises schools that are organized by a private individual or organization (often organized as a social non-profit organization) but are recognized by the Flemish government. In line with the constitutional principle of free educational choice for parents, non-governmental schools in Belgium receive substantial public funding, but are privately managed. Another distinctive feature of Flemish educational governance is that all teachers are paid by the Flemish government, ensuring equal salaries across both official and free schools.

The Flemish educational system is highly decentralized, granting schools significant autonomy. The regulatory framework for educational administration in Flanders has three main levels: the Education Department of the Ministry of the Flemish Community, the three educational networks, and the local schools. The Flemish government sets broad curriculum standards and is responsible for the educational inspectorate which independently monitors all schools. Educational networks play a central role in this decentralized structure. Within each network, one or more umbrella organizations – known as educational coordinating bodies – are active. These umbrella organizations are associations of school boards and organizing authorities. They support school boards, develop curricula, timetables, and teaching materials, and represent school boards in negotiations with the government. Each umbrella organization maintains its own pedagogical advisory services, tasked with strengthening school policy and promoting school development and teacher professional development. These pedagogical advisory services operate as both supply-driven and demand-driven, offering in-service training and school support, and coaching schools that receive negative evaluations from the inspectorate. This also means that these services are traditionally publicly funded, although – in free education – they are privately owned and operated.

5.2.2 *The Role of Pedagogical Advisory Services: Budget Cuts and Changing Priorities*

In Flanders, educational policy has increasingly incorporated elements of the New Public Management approach, reflecting a shift toward marketization and performance-driven approaches within the public education system. Though this evolution has affected different aspects of the Flemish educational system (e.g., public-private partnerships for school infrastructure, framework contracts between educational authorities and the private sector for provision of school improvement services), we focus in this chapter on how this shift has affected pedagogical advisory services and its positioning toward schools. Several structural and policy shifts have reshaped the role of pedagogical advisors and increased the demands placed upon them. For instance, certain school boards have what is known as “drawing rights,”¹ granting schools under these boards greater autonomy in choosing which advisors they collaborate with, whether from their umbrella organization, from other external for-profit entities, or by creating their own advisory service. Additionally, in recent years, there has been an increase in tendering and procurement arrangements, particularly concerning what are known as priority in-service training projects traditionally handled by pedagogical advisory services in collaboration with higher education institutions. Here, too, we see new private for-profit actors being awarded these resources. In addition to this, a budget cut of EUR 11 million in funding for the pedagogical advisory services has been announced, accounting for one-third of their staffing. Temporary additional funds will be allocated and linked to policy-prioritized themes. Concurrent with the cuts in the pedagogical advisory services, educational inspection will be strengthened. All these policy changes are impacting the school improvement sector, which was for a long time a playing field situated between the school and pedagogical advisors who belonged to the same umbrella organization. Those in this sector now see a market emerging with new for-profit players with whom they can engage.

¹ Staffing and operational resources for pedagogical advisory services are calculated based on the number of staff members associated with the educational institutions affiliated with the umbrella organization. Unlike other umbrella organizations, Catholic Education Flanders profiles itself as a membership association. They view government funding as a form of “drawing rights”. The Board of Directors stipulates that large school boards (more than 10,000 students) with their own educational project and co-financing can allocate part of the government funding that is generated based on their staffing to their own school group. Overarching tasks, such as curriculum development, remain with the umbrella organization, while other statutory tasks are taken up by their own internal pedagogical advisors.

5.3 Theoretical and Conceptual Framework

Based on an exploration of international research literature, we approach the current school improvement situation in Flanders as a new ecosystem that requires a specific analytical framework. We begin with a description of private influence in public education, particularly regarding “school improvement” (5.3.1). Next, we introduce the analytical lens through which we examine this evolving ecosystem (5.3.2).

5.3.1 Commercialization of School Improvement: A New Ecosystem

Marketization, commercialization, and privatization are interconnected, yet distinct processes that significantly impact education and school organizations globally (Verger et al., 2017). *Marketization* concerns the introduction of market logics into education, creating quasi-markets through privatization and commercialization (Ball & Youdell, 2008; Burch, 2006; Lubienski, 2006). *Privatization* results from policy reforms and structures that favor parental choice and school autonomy, often with the government as the regulatory body. Ball and Youdell (2008) distinguished between two forms of educational privatization, which sometimes overlap: endogenous – “privatization *in* education” and exogenous – “privatization *of* education.” Endogenous privatization pertains to the adoption of ideas, techniques, and practices from the private sector within education. This includes, for example, contemporary educational reforms aimed at increasing efficiency or enhancing performance-based school accountability. Exogenous privatization involves engaging private organizations to design, manage, or deliver certain educational processes or products within public services (Lingard et al., 2017; Verger et al., 2017). Overlap between these forms is evident in the phenomenon of outsourcing (Powell, 2014). According to Powell (2014), when schools outsource services to external organizations, they not only adopt a private sector business strategy that emphasizes choice and efficiency, but also enable non-public organizations (including voluntary, private, and philanthropic entities) to strategically and financially benefit from public education. *Commercialization* refers to the creation, marketing, and selling of educational goods (such as textbooks, educational materials, and technologies) and services (such as tutoring, assessment, professional development, or school improvement support) for commercial gain (Hogan & Thompson, 2017; Hogan et al., 2018).

In recent years, commercialization has become increasingly prominent in the field of school improvement, with the emergence of new for-profit actors. School improvement actors are typically defined as individuals or organiza-

tions that assist in translating policy themes into concrete actions and practices by providing coaching or training to schools (Honig, 2004). Honig described these as:

[O]rganizations that occupy the space in between at least two other parties. Intermediary organizations primarily function to mediate or to manage change in both those parties. Intermediary organizations operate independently of these two parties and provide distinct value beyond what the parties alone would be able to develop or to amass by themselves. At the same time, intermediary organizations depend on those parties to perform their essential functions. (2004, p. 67)

The literature also distinguishes between system actors (or regular actors) and non-system intermediate actors (non-regular actors). *System actors* include individuals and organizations that belong to the government and local educational administration. They specifically include pedagogical advisory services, school boards, schools, and teachers who take on the role of teacher leaders. Neoliberal educational reforms and the resulting commercialization of the domain of school improvement, however, have led to a shift from the traditional approach where school improvement services were provided by system actors, marked by the rise of *non-system actors* (Coburn et al., 2008; Trujillo & Woulfin, 2014; Woulfin et al., 2018).

In the context of heightened accountability and decentralization emphasizing effective school leadership, there has been a marked shift toward non-system providers offering support, training, and coaching to schools (Burch, 2006, 2009). Within this expanding field of school support, research highlights that commercial actors increasingly play a role that extends beyond assisting with implementation; they actively (and increasingly) introduce new school improvement themes and curricular priorities (*problematization* and *prioritization*), thereby shaping the agenda of educational change (Trinidad, 2023). These non-system actors exhibit considerable diversity in size, scope, and services, ranging from private foundations that design intervention programs to large educational consulting firms that develop professional development initiatives, as well as independent freelancers who coach school leaders (Smylie & Corcoran, 2006). Several authors have investigated non-system actors and noted the increased role of commercial actors and have identified them as part of an increasingly complex system, such that we cannot refer to commercial actors as a “monolithic entity” (Rowan, 2002). School improvement has thus become a system made up of an increasingly intricate network of individuals and organizations (Trinidad, 2023). Because of these radical changes, and

in line with other researchers, we prefer to speak about a new and largely unknown “ecology of school improvement” (Trinidad, 2023, p. 378) that needs further study to arrive at an understanding of how exactly commercialization plays out in school improvement. An understanding of who the buyers and sellers are in this commercialization arena and how they function is of critical importance, as they play a key role in educational change processes and they are starting to play an important role in how education will look in the future (Hogan & Thompson, 2021).

5.3.2 Analytical Lens: Changing Positionings and Dimensions

The evolving ecology of school improvement can be approached through various lenses, addressing a wide range of elements and involving multiple stakeholders. In this exploratory study, we examine how the emergence of commercial actors influences system actors – specifically pedagogical advisors and local schools – by reshaping their positioning and the dimensions of their work within the school improvement landscape. To understand the mutual positioning of various actors, we use positioning theory. To comprehend the school improvement functions that correspond with these new positionings, we use a heuristic framework that differentiates among the various dimensions of the work carried out by school improvement actors. We conclude by summarizing and describing the complementarity of both conceptual lenses.

5.3.2.1 Positioning of School Improvement Actors: Positions, Actions, and Storylines

Previous research into the school improvement field and its actors has shown that it is a complex field, which we cannot simply address as a monolithic entity. The field of school improvement has increasingly become a marketplace and has therefore also undergone structural changes and reconfigurations (Junemann & Ball, 2013). Certain actors have shifted positions within the field, new actors have emerged, and new relationships have formed between schools and these actors, as well as among the actors themselves. This has also been accompanied by a “redistribution of power and responsibility” among these actors (see Junemann & Ball, 2013, p. 426). As indicated earlier, it is important to approach this as a new ecosystem, which implies the need to focus not just on the actors themselves, but also on their relationships: “by studying only specific fields without viewing their connections with each other, one fails to see how ecological configuration matters as much as, if not more than, their direct relationship to schools or districts (Ball, 2008; DeBray et al., 2020)” (Trinidad, 2023, p. 378). Positioning theory offers a valuable framework for examining this ecological configuration, as it explicitly focuses on relationality to understand

how actors come to operate and think. This theory allows for the investigation of how, within this new ecological configuration of school improvement, various actions and interactions give shape to the roles and functioning of organizations and actors (Harré & Langenhove, 1991).

Positioning theory examines how individuals and groups adopt specific roles and identities through discourse, thereby shaping social structures and power dynamics (Depperman, 2015). This theory is based upon the assumption that through speech, individuals shape their own identities and those of others. These positions that are adopted are not tied to job functions or formal job descriptions, but are instead connected with the context-specific, evolving, and mediated actions that occur within discursive patterns (McVee, 2011). By focusing on the dynamic interactions and discursive practices among several actors in the new school improvement ecosystem, this conceptual framework helps elucidate how commercial and non-commercial actors establish their roles, assert influence, and interact with educational institutions (i.e., schools). More specifically, this approach allows for studying the repositioning that occurs as a result of the involvement of (new) commercial actors in school improvement initiatives, and how that impacts the process of school improvement. In sum, positioning theory serves as a pertinent analytical tool for understanding the complex roles and interactions of commercial and non-commercial actors in the school improvement ecosystem, offering insights into the evolving dynamics of school improvement and possible new critical issues that emerge due to the consequent positionings and repositionings.

This study draws loosely on the three key aspects that positioning theory puts forward: positions, actions, and storylines. In our study, we assume that the interplay between these three components gives shape to the new ecosystem of school improvement. *Positions* represent the norms, encompassing rights and duties, that are tacitly agreed upon by actors within the context of their interactions (Moghaddam et al., 2008). According to Harré and Van Langenhove (1991), actors position themselves and others and are also positioned by others. Positions are interdependent; for instance, if an actor is positioned as a consumer, another must be positioned as the supplier, each with their respective clusters of rights, duties, and obligations. *Actions* refer to the ways people use words to locate themselves, known as “speech acts” (McVee, 2011). *Storylines* usually refer to “dynamic episodes or patterns that are created through speech acts and positions” (McVee, 2011, p. 6). This means that these storylines provide a context and entry point for understanding the actions of actors and the positions that are implied. So, by eliciting and analyzing these storylines, it becomes possible to focus on the actions and interactions of actors and to

reveal the dynamics of positionings, that is, how actors both shape and navigate within this new ecosystem.

5.3.2.2 *Dimensions of School Improvement Actors' Work: Scope, Nature, Duration, and Relationships*

For additional support in arriving at an understanding of the new ecosystem resulting from the appearance of new school improvement actors and new positionings, we complement positioning theory with Trinidad's (2023) model delineating various dimensions of school improvement actors' work. This model allows us to determine whether school improvement operations differ when performed by system or non-system actors, as well as how this has evolved with the increasing marketization of the school improvement sector.

The first dimension is the *scope of support*. According to Trinidad (2023), a whole school or comprehensive approach involves systemic interventions aimed at improving the entire school. These initiatives are typically long term and address multiple aspects of school functioning, such as curriculum, teaching practices, leadership, and school culture, with the goal of creating sustainable, school-wide improvements. Specific approaches, on the other hand, involve targeted, often short-term interventions that address specific issues or needs within a school. These initiatives are usually more flexible and can be quickly implemented to respond to immediate challenges, focusing on particular areas such as student behavior or specific curriculum topics. The second is the *nature of support*, distinguishing between direct and indirect support. Direct support involves actors working directly with or in schools, such as providing training, coaching, or managing the schools (Trinidad, 2023). Indirect support refers to supporting schools by conducting research or advocacy that influences policies enacted by schools or their governing bodies (Trinidad, 2023, p. 378). The third dimension concerns the *duration of the intervention*, ranging from short-term interventions (such as training and professional development) to long-term partnerships. The fourth dimension pertains to the *relationships these actors establish with school organizations*. Trinidad (2023) distinguishes between collaborative, supplementary, contractual, and competitive relations. Collaborative relations involve partnerships where school improvement actors and schools work together toward common goals, characterized by mutual support, shared resources, and joint efforts to improve educational outcomes. Supplementary relations involve school improvement actors providing additional resources or services that complement the existing efforts of schools, enhancing or extending their capabilities without replacing their core functions. In contractual relations, there is a formal agreement by which school improvement actors are hired to provide specific services or interven-

tions, defined by a contract outlining expectations, deliverables, and terms of service. Finally, in competitive relations, school improvement actors and schools compete for resources and responsibilities in terms of the organization and initiation of school improvement initiatives and projects. In approaching the new complex ecosystem, these dimensions provide a useful heuristic tool to make sense of newly emerging relations among different actors, both the implied new positionings and the emerging new issues.

5.3.2.3 *Conceptual Conclusion*

The two conceptual lenses – Positioning theory and Trinidad’s dimensions of school improvement actors’ work – are complementary because they address different but interconnected aspects of the changing school improvement ecosystem (Table 5.1).

Table 5.1 Analytical lens

Analytical lens	Key components	Purpose in study
Positioning theory (McVee, 2011)	Positions: Norms, rights, and duties tacitly agreed upon in interactions	Understand how school improvement actors define roles and responsibilities within the ecosystem
	Actions: Speech acts through which actors locate themselves and others	Examine discursive practices shaping relationships and power dynamics
	Storylines: Dynamic episodes or patterns created through positions and actions	Reveal narratives that legitimize roles and influence school improvement processes
Dimensions of school improvement actors’ work (Trinidad, 2023)	Scope: Whole school (systemic, long term) vs. specific (targeted, short term)	Identify whether interventions are comprehensive or narrowly focused
	Nature: Direct (training, coaching) vs. indirect (research, advocacy)	Distinguish between hands-on support and policy-level influence
	Duration: Short-term vs. long-term partnerships	Assess sustainability and depth of interventions
	Relationships: Collaborative, supplementary, contractual, competitive	Analyze relational dynamics

Positioning theory focuses on the discursive and relational dynamics among actors, examining how roles, identities, and power relations are constructed through positions, actions, and storylines. This lens helps us understand how actors perceive and negotiate their place within the ecosystem. In contrast, Trinidad's framework provides a structural and functional perspective, analyzing the substantive characteristics of actors' work through dimensions such as scope, nature, duration, and relationships. This allows us to capture what actors actually do and how their interventions differ in practice. Together, these lenses offer a holistic view: positioning theory explains the social and discursive processes shaping actors' identities and relationships, while Trinidad's dimensions reveal the operational configurations of their work. Combining them enables us to link how actors talk about and justify their roles with how these roles materialize in concrete practices, which is essential for understanding the marketized nature of the emerging school improvement ecosystem.

5.4 Methodology

In order to study the changing school improvement ecosystem in Flanders, we conducted an exploratory qualitative study. Based on the analytical framework, the following research questions were formulated:

- (1) How are pedagogical advisors positioned relative to other school improvement actors in the changing school improvement ecosystem?
- (2) How are schools positioned relative to other school improvement actors in the changing school improvement ecosystem?

Data collection took place during the 2020-2021 school year. Focus group discussions were the primary method of data collection (Onwuegbuzie et al., 2009). This method facilitates access to discourses constructed through dialogue on specific topics and allows for the observation of how various actors negotiate roles, identities, and relationships (Depperman, 2015). A multi-category design was implemented in composing the focus groups, with separate groups formed for distinct stakeholders in the field of school improvement. This method enabled us to capture the nuanced realities of different actor categories – school leaders, school improvement actors, and teacher leaders – each of whom engages with school improvement from unique vantage points. Within each group, participants were purposefully selected to capture a broad range of perspectives and experiences – school leaders from different provinces, diverse actors engaged in school improvement initiatives, and teacher leaders involved in school improvement at various levels of education. This approach offers rich, contextual insights into how participants position them-

selves and others, revealing the dynamics of social interactions and discursive identity construction (Onwuegbuzie et al., 2009). A total of three focus groups were conducted (each with a duration of 90-120 minutes), involving a total of 20 participants (see Table 5.2 for an overview).

Table 5.2 Overview of focus group participants

Focus group	Participants	Type of organization / regional context
Focus group 1 (FG1) – Educational leaders	School leader 1 School leader 2 School leader 3 School leader 4 School leader 5 School leader 6	Primary education – Brussels Primary education – Belgian Limburg Primary education – Antwerp Secondary education – Flemish-Brabant Secondary education – Flemish-Brabant Secondary education – Brussels
Focus group 2 (FG2) – School improvement actors	School improvement actor 1 School improvement actor 2 School improvement actor 3 School improvement actor 4 School improvement actor 5 School improvement actor 6	Leader of Commercial organization 1 Leader of Commercial organization 2 Leader of a pedagogical advisory service (Umbrella organization 1) Leader of a pedagogical advisory service (Umbrella organization 2) Pedagogical advisor (Umbrella organization 3) Member of the Education Inspectorate
Focus group 3 (FG3) – Teachers	Teacher 1 Teacher 2 Teacher 3 Teacher 4 Teacher 5 Teacher 6 Teacher 7 Teacher 8	Secondary education – Belgian Limburg Secondary education – Antwerp Adult education – Flemish-Brabant Primary education – Brussels Primary education – Antwerp Primary education – Antwerp Primary education – Flemish-Brabant Primary education – East-Flanders

Participants were recruited using purposive sampling to ensure diversity and relevance to the research questions. For the school leaders' focus group, we targeted individuals who had either completed an advanced bachelor's degree in school development or collaborated closely with colleagues acting as internal school improvement actors. To capture perspectives beyond local contexts, we selected school leaders from different provinces across Flanders. For the second focus group, which focused on school improvement actors, we included representatives from emerging private for-profit organizations, established pedagogical advisory services, and the Education Inspectorate, given its unique role in evaluating advisory services and shaping school improvement policy. This deliberate composition aimed to foster dialogue across traditional and new actors in the school improvement landscape. Given that these actors regularly engage in dialogue and have contact outside the context of the focus group, we did not anticipate that the group composition would inhibit openness. On the contrary, during the sessions, participants demonstrated openness and transparency and expressed appreciation for the opportunity to engage collectively in discussing the implications of these changes. The third focus

group comprised teacher leaders enrolled in an advanced bachelor's program in school development. Diversity in this group was ensured by selecting participants from different levels of education and provinces, thereby maximizing the likely breadth and depth of their input.

To accommodate participants' schedules and geographic dispersion, all focus group sessions were conducted online via Microsoft Teams. The focus groups were facilitated and conducted by four researchers², with two participating in each focus group. One researcher moderated the discussion, while the other took notes and asked additional questions to deepen and broaden the participants' input. The interview guide was informed by the analytical framework, and the semi-structured format allowed participants to contribute freely and engage in extended discussions on specific topics. This flexibility was essential given the exploratory nature of the study. The interview guide had five sections: (1) introduction, (2) definition and dimensions of school improvement actors' work, (3) competencies of school improvement actors, (4) positioning of internal versus external school improvement support providers, and (5) conclusion. Each session was video recorded via Teams and transcribed verbatim. The focus groups were conducted in Dutch and transcribed in the same language; for publication purposes, all quoted material was carefully translated into English to ensure accuracy and contextual integrity.

During the initial phase of analysis, transcripts were open coded, after which the codes were grouped into broader categories through axial coding. This iterative process was repeated for each focus group, ultimately resulting in a coding scheme that was applied during the final coding phase. Throughout the coding process, we drew on the analytical framework, paying close attention to the positions, actions, and storylines that emerged during the focus groups, as well as to the scope, nature, duration, and type of relationships that developed. This led to the identification of the following codes (non-exhaustive): *Position_Schools_Marketplace buyers*, *Position_Pedagogical advisors_Regaining legitimacy*, *Action_Schools_Making choices*, *Action_Commercial actors_Scope_Introducing specific expertise*, *Action_Pedagogical advisors_Scope_Context-specific support*, *Action_Commercial actors_Duration_Ad hoc interventions*, *Storyline_Pedagogical advisors_Sustainable school improvement*, *Storyline_Scope_School improvement requires diverse expertise*, and so forth. These codes directly addressed our research questions by

2 For data collection, we collaborated with three colleagues associated with an advanced bachelor's degree program in school development. We would like to specifically thank Ria De Sadeleer, Mieke Bogaerts, and Gert Bourgeois for their involvement in preparing for, conducting, and transcribing the focus group discussions.

revealing how pedagogical advisors are repositioned as long-term, context-sensitive partners striving to regain legitimacy (RQ1), while schools emerge as active consumers navigating a competitive marketplace (RQ2). Additional codes related to commercial actors highlighted the hybrid and marketized nature of the ecosystem, providing nuanced insights into evolving roles, relationships, and power dynamics.

The first author led the analysis, with co-authors serving as critical friends throughout the process. In the second phase of interpretive analysis, systematic similarities and differences across the three focus groups were examined. Preliminary interpretations were shared and critically discussed within the research team.

5.5 Results

Our results focus on how various actors have been repositioned within this changing school improvement ecosystem that is becoming increasingly commercialized due to policies of liberalization and decentralization, with new players moving into both schools and pedagogical advisory services. In the Results section, we will deal in depth with the repositioning of pedagogical advisors (RQ1, 5.4.1) and schools (RQ2, 5.4.2) in the changing school improvement ecosystem.

5.5.1 The Repositioning of Pedagogical Advisors

5.5.1.1 Re-Active Reinvention

The pedagogical advisors and school actors did not openly question or oppose the arrival of private for-profit actors in the school improvement ecosystem. These new entrants were perceived as legitimate and as increasingly securing a place in the school improvement market, but also as necessitating a response from existing system actors. More specifically, as part of their repositioning, pedagogical advisors seemed to be expected to reinvent themselves to maintain their relevance. Pedagogical advisory services, in other words, seemed to face an identity crisis, instigating a rather fundamental reconsideration of their roles in relation to the new players. We categorized this phenomenon as the *reactive reinvention of pedagogical advisory services*. It is not a pro-active change, but a reinvention occurring as a reaction to what is perceived and even welcomed as a new reality. A pedagogical advisor, for instance, said:

I find the presence of private players in this market very beneficial (. . .). They explore areas or bring up topics and trends that we might miss in our daily work. These private players keep us alert, and I think that is good. (FG2)

The emergence of commercial actors and the topics that they cover compelled regular actors to consider how they could sustain their role in the field *alongside* these new actors. This led to a reinvention of the work of regular system actors, emphasizing what distinguishes them from the new actors in terms of the *scope* and *duration* of their interventions, as well as the *type of relationships* they develop with schools. More specifically, private (commercial) school improvement actors were identified as those who can be actively engaged by schools when there is a need for very specific expertise, when the school requires higher intensity guidance, or when short-term input is required. During the focus groups, pedagogical advisors' work was (re)defined to include being permanent school improvement actors (instead of temporary actors), establishing more collaborative relationships with schools (instead of contractual relations), and responding to planned (instead of ad hoc) questions that address a more comprehensive (instead of specific) approach. More generally, their new position was defined in terms of being responsible for guaranteeing sustainable change processes within schools. A pedagogical advisor made this explicit as follows:

Where do we see a fundamental difference between pedagogical advisors and private consultants? This difference is primarily related to the long-term relationship that we as traditional actors have with schools. A commercial organization comes in to run a project and eventually leaves, whereas the relationship with the pedagogical advisory service is more stable. (FG2)

The repositioning of pedagogical advisors was reflected in the emergence of a new storyline centered on sustainable school improvement. By emphasizing their capacity to build long-term collaborative partnerships with schools, a narrative was constructed that positions pedagogical advisors as integral contributors to enduring change processes.

This shift was also reflected in how commercial actors constructed their own storylines that articulated how both types of school improvement actors can be positioned within the field. These narratives often emphasized the importance of complementarity between actors:

Due to the interventions we [as commercial actors] carry out, we also look beyond our impact. What can the pedagogical advisors take on here, since we will be gone after 3 years? And what about the internal teacher leaders? How is this continued toward sustainability? This could mean that we train someone within the school, but also that pedagogical advisors are involved (...). (FG2)

Part of the new ecosystem seemed to be that pedagogical advisors are called into action, together with the involvement of school-internal actors, to ensure the sustainability of the change processes initiated by private actors. In other words, the new positioning implies that the role of pedagogical advisors is characterized not only by the scope, duration, and type of relationship they build with schools (pro-active, sustainable, collaborative work), but also by how they are called into action to interact with and because of the non-system actors.

5.5.1.2 *Re-earning Legitimacy*

The legitimacy that pedagogical advisors have enjoyed for many years is no longer taken for granted. This became evident from the narratives of principals and commercial school improvement actors. They noticed that pedagogical advisors are not always identified as the primary partners in improvement initiatives and are sometimes not informed about the involvement of other actors. This point was made explicit by a representative of the pedagogical advisory services, who stated:

What we try to make clear to our schools is: it's not a problem if you collaborate with external stakeholders, but please keep us informed. We can create a school file that includes all the improvement processes happening within a school, but if there is a parallel project that we are unaware of, it becomes very difficult. This is the agreement we try to make with external partners: to at least keep each other informed and strengthen each other where possible. (FG2)

Moreover, pedagogical advisors and commercial partners are often perceived and treated differently within schools. New players are sometimes considered more legitimate or strategically advantageous due to the specific expertise they bring and the methodologies they use. This shift in legitimacy was evident in the preferential treatment commercial actors receive; they are often given more time, space, and respect. This difference in legitimacy generated frustration among traditional school improvement actors:

Schools can use our services for free, and this happens frequently. But if they have to pay, we see that these external actors are given a different status or that time and space are more easily made available for these actors. (FG2)

This sometimes leads to frustration among our own staff of pedagogical advisors. (FG2)

This difference was expressed in a similar way by private actors: “As a non-regular support provider, I get my time and place, and people are present on time. During my interventions, people are also freed up from their duties. This is not the case for pedagogical advisors” (FG2).

A similar shift was also expressed on the part of school principals. They indicated that one reason to opt for commercial actors is the perception that their involvement is more readily accepted in schools compared to working with advisors from umbrella organizations, or even when change is initiated from within the school itself:

I think it is sometimes useful to bring someone from outside the school so that teachers do not feel like the school has to figure everything out on its own, but rather that you can draw on expertise from various sources. (FG3)

The liberalization of the school improvement market has given rise to a new storyline in which traditional system actors – pedagogical advisors – are no longer positioned as inherently legitimate authorities, but as professionals who must actively re-establish their legitimacy in relation to schools.

5.5.1.3 *Re-Establishing Boundaries: Expertise, Topics, and Schools*

The arrival of new actors prompted pedagogical advisors to reflect on the scope of their interventions, both the expertise they have, and the areas of school improvement they work on. This resulted in the protection and delineation of their core curriculum domains, but we also noticed a *forced refocusing of their expertise* on specific substantive themes and schools. First, pedagogical advisors are no longer perceived as the only experts in school improvement. Regarding the expertise of commercial actors, focus group discussions revealed that despite the lack of a quality framework for evaluating commercial actors, they are perceived by schools as valuable experts. The introduction of external or outside actors is often considered inherently valuable, regardless of whether it actually involves genuine expertise (see also Powell, 2014). Second, some actions

in the new school improvement ecosystem are discussions about who possesses which expertise and where this expertise originates. Emerging debates could be noticed about who is entitled to claim certain substantive forms of expertise. Themes related to the pedagogical identity of schools (and educational networks), such as school leadership, school identity, and pedagogical projects were seen as the core focus of pedagogical advisors, along with themes related to the core curriculum. However, exactly at this point a re-establishing of boundaries around expertise also took place:

If there is one thing that is essential in the context of the pedagogical project, it is leadership. The fact that it is now being commercialized is painful for us [as pedagogical advisory services]. I can certainly see our complementarity, but it remains a very sensitive issue. When [Leader of commercial organization 1] earlier made the link to identity, that is the connection to a school's pedagogical project. Linking this to leadership, it is very strange to place it outside the narrative of a sustainable relationship. From a certain perspective, this complementarity is a topic that will always need to be discussed. We need to examine where it fits. (FG2)

This highlights the sensitivity and complexity of this refocusing process, particularly regarding the possibility of complementary roles for traditional (pedagogical advisors) and new (commercial) actors in supporting schools with the development and implementation of their particular pedagogical projects.

The discussion surrounding the scope of interventions also revealed a process of thematic refocusing in the work of pedagogical advisors. This shift reflected an evolving understanding of their role, as they increasingly concentrate on specific areas of school improvement aligned with broader systemic priorities. Pedagogical advisors feel compelled to outsource internal services on certain topics by referring schools to other (commercial) providers. This is particularly true for substantive themes they can no longer address, such as team coaching, and for issues that require either immediate intervention (urgent matters, ad hoc change processes) or intensive support in non-priority schools:

There are good reasons to say: we cannot take this on, and you would be better off seeking external expertise. This may be due to the specificity of a topic, such as poverty, where we do not have anyone in-house who is expert on the topic. Or the intensity, if a school says, we want someone to support the school leader on a weekly basis for a trimester, that is difficult for us, and you would need to bring in someone else. (FG2)

More generally, the focus group discussions indicated that all the actors (pedagogical advisors, commercial actors, and schools) were seeking ways to collaborate, but that the role of specific types of expertise was re-established, especially for the “external” commercial actors:

I find them effective when it comes to very sensitive matters. For example, if your team is stuck or something is very sensitive, there is resistance within your team. External (private) players are often more neutral and better able to lead that process than someone internal from the school.
(FG1)

Finally, the changing school improvement ecosystem, which has been shaped by recent policy decisions, has not only influenced the thematic scope of the interventions undertaken by traditional actors, but also directs pedagogical advisory services toward specific schools. In particular, these interventions target schools identified as underperforming based on inspection results or characterized by lower socio-economic student populations. This shift pushes the pedagogical advisory services, in their role as system actors, more toward performance-oriented guidance to assist schools in achieving better results. Consequently, other schools, usually those that are normally or better-performing, fall outside their sphere of influence. Due to their limited resources, the pedagogical advisory services have less capacity to serve these schools as well, and this results in specific debates within the new ecosystem:

If you move toward full commercialization, it will make strong schools stronger and weak schools weaker. I think you can already see this happening. Who are the ones making the most judicious use of guidance and support? It is actually the strong schools. You can't blame them for that; it is a good use of resources. But in a market model, this will become even more pronounced. The difficulty when talking about complementarity is that the line is not so clearly drawn. (FG2)

The re-establishing of new boundaries as part of the repositionings in the new ecosystem thus also has to do with more general questions about doing justice to differences among schools and their different needs and about contributing to a level playing field between schools.

5.5.1.4 Recognizing and Dealing with Hybrids

The results also indicated that policy developments, such as the encouragement of tendering and “contracting out” through the drawing rights system

and the reorientation of subsidies directly to individual schools instead of to intermediary organizations, are blurring the strict boundaries between system actors and non-system actors. This change in funding streams repositions traditional pedagogical service providers in terms of thinking about what is public and what is private, with regard to their own role as well. As indicated earlier, traditional pedagogical service providers orient school actors toward private services, meaning that the work of the pedagogical advisors becomes a kind of hybrid work (public-private partnerships). Another example is how commercial players increasingly respond to public calls for organizing professional development trajectories for schools and are being awarded these contracts.

Consequently, the ecological configuration of school improvement in Flanders is not just about system and non-system actors, public or private actors each with their public or private funding. It is a more hybrid field of diverse actors and diverse ways of funding. It is also now actually a field in which certain private actors can obtain (through tendering and public funding) a kind of central position similar to the position that the traditional system actors used to have. As summarized by a leader of a commercial organization, the ecosystem can be described as follows:

The model we are in: we are financed by the government for some projects (such as leadership development programs), while other projects are not. So, we ourselves are also very much in a hybrid financing model, which I think is where we are all heading. (...) If the government maintains this tendering model, part of the offerings will be subsidized, and part will be financed by professional development funds that go to the school, which the school can then use to purchase external expertise. (FG2)

This ecosystem of mixed funding aligns with findings by other researchers (such as Trinidad, 2023) regarding what are referred to as “blurred boundaries” and puts the traditional pedagogical advisors in a position where they must recognize this new hybridity (within their own operations as well) and must find ways to deal with this.

5.5.2 *Repositioning of Schools*

5.5.2.1 *Shopping within a Marketized School Improvement Ecosystem*

School organizations are also experiencing changes in their school improvement processes and are repositioned within the school improvement ecosystem. The arrival of private actors in the school improvement ecosystem

confronts schools with a very wide range of support options. Schools can now access diverse forms of support in terms of scope, nature, and duration. This puts schools in a new position as critical buyers: “It’s a bit like shopping. We usually check if we have enough in-house expertise to handle it. If not, we look for the best external help” (FG1). And as a pedagogical advisor stated:

We sometimes explicitly tell schools: you don’t need to request support from us. It doesn’t benefit us directly. We are funded by the Flemish community (. . .) Yet, we see that schools struggle with this and say: “Yes, I will just bring everyone in.” (FG2)

As articulated clearly in the previous quote – and this was emphasized by both school improvement actors and school actors themselves – it is not easy for schools to make a targeted and well-founded choice within this broad range of options. One school leader clearly described how schools try to deal with this new position in an ever-expanding market:

It’s great that the offerings exist, but indeed, it’s overwhelming. And the private sector is a thousand times worse. What do we do about that? Within the school community, we communicate our focus areas and consult with colleagues. Word-of-mouth recommendations: have you had experience with...? Searching on our own is very difficult. (FG1)

Schools thus are confronted with a kind of “marketplace” of school improvement services where schools not only face an oversupply but also find it increasingly difficult to make targeted choices about which actors to collaborate with and on what topics.

5.5.2.2 Facing Fragmented and Disembedded Innovations

A second aspect characterizing the repositioning of schools is what we term fragmented and disembedded innovation. As indicated earlier, school organizations are increasingly confronted with an ever-expanding market, in which they do not always find their way easily. A risk associated with this is that schools may engage in various support trajectories without a view of their integration. And indeed, the focus group data clearly indicated that many different actors are often simultaneously working in schools on various, and sometimes even the same, themes. There is, first, a risk of fragmented innovation in schools:

Sometimes schools think the more support they bring in, the better. We have many needs and challenges, so we rely on our regular guidance and other organizations. (...) We see schools with four or five partners all working on the same theme. You notice that many people are working and thinking from their own systems, and the school is not actually being helped. When you consider all the manpower and resources available, if they were used properly, we could achieve much more. This is a significant concern for me. (FG2)

Interventions that are not coordinated and integrated may decrease efficiency and overall increase the risk of jeopardizing successful change and improvement in a school. The increasing involvement of diverse actors in school improvement projects also confronts schools with disembedded innovation. Schools experience a tension between choosing improvement trajectories that align with their pedagogical project – either arising from or further strengthening their project – versus opting for more standardized programs where the link with the school's own pedagogical identity and local context is not always central. This also reflects a difference in approach: while pedagogical advisors inherently connect with the school project (whether ideologically or pedagogically), external actors remain “pedagogically neutral” and must remain neutral to increase their range. This repositioning exposes schools to a market of universal or standardized solutions for nevertheless complex and situated problems that are hard to disconnect from the school identity and specific pedagogical projects (see also Ideland et al., 2020).

5.5.2.3 *Rediscovering Policymaking and Leadership Capacity in Schools*

In striving to have greater control over the support they choose and receive, schools seemed to rediscover their own policymaking capacity. They aimed to take full responsibility for school improvement by seeking external expertise that aligns with their own questions and existing knowledge. Both school leaders and school boards play crucial roles in the processes resulting from this new positioning:

The school is at the helm, and strong school leaders and school boards deploy supporting agencies as they see fit. The more policymaking capacity a school has, the more they will shape the relationships themselves, and it is also important that ownership lies there. (FG2)

This repositioning was also evident in the following:

It is incredibly important that the pedagogical advisors recognize the strengths within the school, supports them, and gives them a boost. Sometimes that boost is needed and can come from external sources. (...) You need to empower people within the school itself. (FG3)

In addition to rediscovering the school's policy capacity and responsibility regarding improvement, the role of internal school improvement actors (that is, "teacher leaders") was highlighted. They were even identified as key bridge figures. First, they were regarded as important in helping schools navigate the extensive range of available options, making targeted choices that align with the school's vision. Additionally, they were recognized as crucial, embedded actors in sustaining change processes, serving as essential intermediaries between external support providers and the specific school context.

5.6 Discussion and Conclusion: The Rise of New Critical Issues

 Our findings indicate that the increasing involvement of new actors – facilitated by recent policy decisions – not only broadens the range of stakeholders engaged in school improvement, but also reshapes the roles of existing ones. Drawing on positioning theory (Harré & Langenhove, 1991) and Trinidad's (2023) framework on the dimensions of school improvement actors' work, we identified the emergence of new narrative configurations in which actors are repositioned and their actions redefined – particularly with respect to scope, duration, and relational dynamics. Pedagogical advisors, as traditional system actors, are embedded within a storyline of sustainable improvement. Their interventions have been reoriented and refocused toward school-wide, contextually responsive school improvements, and anchored in long-term partnerships. In contrast, commercial actors are portrayed as providers of specialized expertise, offering more targeted, flexible, and short-term support, often shaped by financial constraints (because schools must pay for it). Schools themselves are increasingly positioned as pivotal actors who, given the oversupply of external services, must exercise greater control over what enters their institutions. By actively selecting services that align with their particular realities – whether in collaboration with pedagogical advisors or commercial providers – schools assert agency in shaping the school improvement ecosystem. These evolving storylines increasingly portray the relationships among

schools, pedagogical advisors, and commercial providers as complementary, with each actor contributing distinct forms of support aligned with their expertise and positioning. In this Discussion section, and by way of conclusion, we address three critical issues arising from this new ecology of school improvement and the associated repositionings, drawing also on insights from the focus groups: (1) how to ensure the quality of support services, (2) what forms of partnerships are feasible or desirable, and (3) whether school improvement should be externally driven or reclaimed as a core responsibility of the school itself.

5.6.1 *Quality Issues in School Support: Critical Consumerism or State Control?*

The quality of services provided to schools and how to ensure good quality is a significant issue emerging from the changes in the school improvement ecosystem. Offering more choices to schools without a form of support (via a quality evaluation framework) and control may contribute to an oversupply and certainly puts schools in a position in which they struggle to find their way (see also Powell, 2014). The focus groups emphasized the need for a clear quality framework (a “*labeling system*”) that includes both traditional and for-profit commercial actors to ensure high-quality support. It was argued, for example, that while pedagogical advisory services are regulated and face state inspection, this is not the case for commercial actors (see also VanGronigen et al., 2022). A deep concern expressed was the importance of monitoring the quality of support provided to schools, especially to prevent schools from receiving low-quality support.

More generally, the question arises whether the neoliberal landscape, where efficiency, market accountability, and freedom of choice are promoted as promising principles, allows for an adequate quality-oriented strategy for school improvement. During the focus group discussions, two solutions were proposed to gain better quality control in the new market environment. First, schools could adopt the role of critical consumers (“*empower schools*”), making informed choices about the available offerings (“*don’t shop around with everyone!*”) and actively communicating about the quality of the services provided. Second, participants referred to the need for more control through the creation of a quality framework for all school improvement actors. The Flemish government or the school improvement field itself were urged to fulfill their responsibility during the focus group discussions. This was a call from the representatives of the private sector as well:

It may sound strange [as a commercial actor], but I am personally the biggest opponent of the complete commercialization of the school improvement field, precisely because I believe – as seen in the Netherlands – it has been accompanied by many hypes and trends being introduced into schools without any control over their effectiveness in education. (FG2)

It is important to stress that the quality issue seems to be especially critical when an improvement focus is linked up with the curriculum, that is, in the case of improvement actions aimed at the core curriculum. The lack of regulation for private actors raises deep concerns about the effectiveness and alignment of their services with the curriculum as publicly and in a democratic way set by the state. While the pedagogical advisors traditionally have a very close connection with developed curricula (to work toward attainment targets as set by the government and elaborated by the governing boards), it is unclear how this applies to commercial players and to what extent this even poses a risk for new, privately initiated and commercially oriented, curriculum content and formats (see Cowan et al., 2025).

5.6.2 *Partnerships: Collaboration in a Competitive Ecosystem?*

A second issue concerns the types of partnerships that can emerge within the new ecosystem. As new actors appear and regular actors are repositioned, the range of relationships within the ecological field also changes. Focus group discussions revealed that school improvement actors are actively searching for ways to relate to each other. More specifically, this seems to be a changing ecosystem in which actors (still) express uncertainty about which partnerships are desirable and which (certainly) not. In the Results section, we mentioned that testing boundaries – whether related to themes, duration, or responsiveness to school needs – is a way to clarify relationships. At the same time, this is not straightforward, and it seems to be part of the new ecosystem that these boundaries and relationships cannot be static. For commercial actors, and despite their willingness to act in complement with other partners, the constant presence of competition makes it difficult to keep on focusing on the same themes and set of collaborations. The result is that in the new ecosystem, which has a strong dynamic of competition, *all* school improvement actors are in a position where they will have to redefine their role and relationships on a permanent basis. In other words, the various stakeholders emphasized the importance of collaboration and maximal integration, believing in the complementarity of both types of actors, but at the same time acknowledged that

this is not easy to achieve. Based on Trinidad's (2023) distinction, we see that in the new landscape there is a continual exploration of collaborative and supplementary relationships, but with the new competitive relationships remaining ever-present in the background. The result being that "collaboration" is becoming itself a marketing strategy, for both the traditional system actors and the private actors. The fundamental question, of course, is whether such a hybrid environment with publicly funded, privately funded, and mixed funded actors and a complex set of ever-changing relationships is viable at all in the long run.

5.6.3 *School Improvement: An Internal Endeavor or an External Responsibility?*

The third issue concerns who is responsible for school improvement. The liberalization of school support services – in a context of performance pressure, teacher shortages, and lack of mandates – has led to a pronounced shift in innovation toward external actors. As a result, innovation is increasingly outsourced rather than embedded within school teams or supported through internal capacity building. Moreover, in the Flemish context where pressure on school performance has recently increased (with the introduction of centralized testing and school feedback systems) and the government emphasizes learning outcomes and output control, there is even more pressure on schools to turn to external (and commercial) support to quickly solve internal problems. A similar outsourcing of core tasks in a neoliberal performance and accountability-driven culture has been previously demonstrated in other contexts and regarding other educational themes (see Powell, 2014). The key issue here is also that it becomes easier for schools to outsource when the funding opportunities for school improvement are aligned with the accountability driven policy discourse, so that schools are not only inclined to outsource improvement initiatives but also have the (financial) capacity.

This shift to external actors, however, seems to contradict the school innovation literature in recent years emphasizing the importance of internal expertise development and the development of school organizational expertise (see Datnow & Park, 2019; März et al., 2017; Watson, 2014). This apparent contradiction is also in line with the focus group discussions, which revealed that the changing ecosystem brings new dynamics to schools, prompting them to consider and re-discover the importance of internal school developers. These individuals are seen as potential bridge figures responsible for identifying internal expertise before seeking external help. However, the lack of an official mandate within schools and "limited hours" (that is, school funding for these roles) often prevent schools from addressing school improvement issues themselves and independently (*"it simply gets added to my tasks"*), creating an

additional push toward calling upon external support. This trend suggests a growing role for external (commercial) actors in school improvement, raising the possibility that an increasing share of these processes may come to rest in their hands. This, in turn, prompts critical questions about the sustainability of such arrangements and about who – and what interests – will ultimately shape the future of schools and curricula.

5.6.4 Conclusion

This study has shown how school improvement, as increasingly observed in the Flemish context, exemplifies processes of both commercialization and privatization. On the one hand, school improvement embodies commercialization, as services are increasingly structured according to market logics: they are branded, priced, and promoted as tailored solutions for specific school challenges. Schools, in turn, are positioned as consumers navigating a competitive marketplace of educational services. On the other hand, it reflects privatization, through the outsourcing of core pedagogical support functions – traditionally carried out by system actors such as pedagogical advisors – to external providers, often funded through public mechanisms such as tenders or grants. Our results illustrate how government policy decisions have restructured the ecosystem surrounding school improvement. One key development is the reconfiguration of funding mechanisms, granting schools increased autonomy and enabling private actors to access public resources through tendering processes. This has led to the emergence of new funding streams and the facilitation of public-private partnerships. The boundaries between public and private, system and non-system actors are becoming increasingly blurred, as hybrid roles emerge – driven in part by these new funding arrangements. This shift aligns with the notion of soft privatization (Cone & Brøgger, 2020), wherein the State, through subtle modes of governance, enables market mechanisms and private actors to occupy greater space within the educational sector. These hybrid actors, along with the evolving mechanisms for financing, organizing, and governing school improvement in Flanders, exemplify how soft privatization constitutes a “blurred process where public and private interests converge, and privatization must be seen in relation to or as a part of public governance (Cone & Brøgger, 2020)” (Bjordal, 2022, p. 43).

This dual dynamic – where school improvement is both a privatized function and a commodified product – raises important questions about the governance, coherence, and equity of school improvement efforts. These hybrid configurations warrant further investigation to map and understand the complex relationships among state, private, and school actors. In particu-

lar, it is essential to examine how these arrangements impact the governance, coherence, and equity of school improvement efforts. What the new positionings and critical issues in the new ecosystem of school improvement show is that several fundamental issues still need to be addressed and settled. Clearly, it makes little sense to do this just by imposing traditional distinctions and boundaries (system vs. non-system, public vs. private, ...) and thinking too much along existing dimensions. The new ecosystem with changing relationships and hybrid entities must be taken as a new reality, but not one without issues and even fundamental concerns. Therefore, it is important – in future research as well – to try to discuss these hybrids in depth and perhaps to begin by developing a new and adequate vocabulary to give them a proper name. Equally important will be to raise the question arising from the new ecology concerning what the role of education is about and whether we, in this new environment, want to continue to value in education what we used to protect and defend by making it “public”. In taking up this challenge, we should keep in mind that there has always been a sort of ecosystem lying between the market on the one hand and the state on the other hand, and referred to with terms such as civil society organizations, the commons, social non-profits, and the like. This could provide inspiration for thinking about new intermediate actors and associations within the new ecosystem, and to continue thinking about the future of education and school improvement as a common, collective endeavor.

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6 Quality Assurance in a Quasi-Market of Education: The Case of Teaching and Learning Interventions in the Netherlands

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Abstract

This chapter analyzes private sector involvement in the Dutch quasi-market for teaching and learning methods, focusing on interventions addressing language delays. Using Levin's framework on educational quasi-markets, it examines the instruments of finance, regulation, and support services and their influence on key outcomes such as freedom of choice, efficiency, equity, and social cohesion. The analysis is situated in the distinctive institutional context of the Dutch education system, characterized by extensive school autonomy, universal choice, and equitable funding under Article 23 of the Dutch Constitution. The chapter shows that competition among private providers has increased the diversity of available educational programs but also intensified socio-economic disparities. Wealthier households invest more in remedial tutoring and learning materials, while schools often struggle to make evidence-informed choices due to limited quality assurance mechanisms. Consequently, ineffective programs persist, and international assessments reveal declining literacy and growing inequities. Accountability in the Dutch education system is fragmented, making it difficult to compare student performance and evaluate school quality. Recent policy initiatives aim to address these issues by promoting evidence-informed practices. However, the absence of standardized definitions for "evidence in education" and limited investments in context-relevant research constitute significant barriers. The chapter concludes with policy recommendations to enhance the effectiveness in an educational quasi-market, emphasizing the need for centralized evalua-

tion frameworks, strengthened support services, and improved accountability measures. This analysis contributes to broader debates on privatization in education, offering insights into balancing autonomy, equity, and quality.

6.1 Introduction

Education is widely recognized as serving both public and private interests (Levin, 1999). From a public interest perspective, education plays a critical role in fostering social cohesion, economic development, and democratic governance. At the same time, education serves significant private interests¹, as individuals who attain higher levels of education typically experience better employment opportunities, higher earnings, and improved life outcomes (Psacharopoulos & Patrinos, 2018). From the perspective of the individual, education thus functions as a means of acquiring knowledge, skills, and credentials that increase one's competitiveness in the labor market (Mincer, 1974). In addition to such so-called human capital, education enhances personal well-being, as it is associated with greater life satisfaction, longer life expectancy, and higher levels of civic participation (Oreopoulos & Salvanes, 2011).

Thus, from a goods and services perspective, education is neither purely private nor public (Levin, 1987, 2003). This dual role of education highlights a key tension: while it is often considered a public good, with widespread societal benefits, it also provides private returns that can be unequally distributed. This has led to debates on the appropriate balance between public and private involvement in education systems, where privatization involves various levels of private sector engagement in areas such as management and the supply of essential resources, illustrating its complex and evolving nature (Belfield & Levin, 2005; Walford, 2013). Globally, private sector involvement in education has increasingly gained prominence, a trend driven by policies promoting privatization, school autonomy, and accountability mechanisms designed to foster efficiency and responsiveness in education systems (Verger et al., 2016; Lingard, 2020). These policy principles reflect international shifts towards market-driven approaches and decentralized governance, which are intended to stimulate innovation, choice, and performance accountability. The interplay between increased autonomy granted to educational institutions and strin-

1 While inequality in private returns is also relevant to discussions of educational equity and fairness, our intention is to emphasize the broader conceptual tension arising from education serving both collective (societal) and individual interests.

gent accountability measures has become a significant focus in comparative education research, with scholars critically examining its implications for educational equity, quality, and democratic control (Ball, 2007; Lingard & Sellar, 2013; Verger et al., 2016).

This chapter investigates a specific case of private sector involvement in the provision of education, namely the quasi-market for teaching and learning interventions in the area of language and literacy² in the Netherlands, with a specific focus on targeted approaches for language delays. The education system in the Netherlands has been providing universal school choice to households since 1848, with private and public schools under equal government funding ever since 1917. Article 23 of the Dutch constitution defines the government's responsibility for ensuring desired educational outcomes ("the what") while refraining from prescribing the specific means or processes schools must follow to achieve these outcomes ("the how"). This legal framework grants significant autonomy to schools, a cornerstone of Dutch educational policy and culture. However, this autonomy is counterbalanced by stringent accountability measures imposed by the educational inspectorate and a system of universal school choice.

Schools thus have considerable control over their educational processes, including teaching and learning interventions, curriculum design, and resource allocation. This autonomy therefore limits the state's capacity to regulate areas such as the development of teaching materials and professional development programs for educators. In the context of teaching and learning resources, the institutional arrangements create a quasi-market where public and private actors coexist and interact in a competitive and partially regulated environment.

This chapter explores the consequences of this dynamic for the four outcomes of education: freedom of choice, equity, productive efficiency and social cohesion. For this purpose, Levin's (2002) framework for analyzing quasi-markets in education is applied, focusing on the educational market for teaching and learning interventions in the area of language and literacy and particularly on interventions aimed at addressing language delays. The focus serves as illustrative examples of broader trends that may also apply to other areas of educational provision.

2 Educational interventions vary widely, from brief, focused activities targeting specific skills to extensive, multifaceted programs that aim to achieve broader outcomes. While simpler interventions often involve quick demonstrations and practice, larger initiatives require significant resources and have a much broader scope (Graham & Harris, 2005).

By analyzing the quasi-market for teaching and learning interventions in the area of language and literacy, the chapter examines three key design elements: finance, regulation, and support services. By applying this framework, this chapter contributes to the understanding of some key dynamics within the Dutch educational market and the extent to which it supports or hinders the achievement of high-quality and equitable educational outcomes. Ultimately, the chapter offers policy recommendations to better align educational autonomy with evidence-based approaches, while enhancing accountability and fostering innovation in teaching and learning materials.

6.2 Background

6.2.1 *Levin's Framework: Design Instruments*

A quasi-market for education refers to a system in which market-like mechanisms, such as competition and choice, exist alongside government regulations and oversight. Levin's (2002) framework identifies three design instruments that policymakers can use to organize these quasi-markets: finance, regulation, and support services. Each of these instruments plays an important role in shaping the structure and outcomes of educational systems, particularly in contexts where public and private interests intersect.

Finance

Finance encompasses all sources and allocation of funds within the educational system. Key questions include who provides funding (e.g., the State, private entities, or a combination of both), how funds are distributed, and what costs are covered by these funds. In quasi-markets, it is essential to consider whether schools are allowed to charge fees, whether funding is allocated based on student needs, and how resources are distributed across different types of schools. The goal of equitable financing is to ensure that all students, regardless of their socio-economic background, have access to high-quality education.

Regulation

Regulations determine which schools are eligible to provide education and receive public funding. They also establish the degree of autonomy schools have in making decisions about admissions, curricula, instructional materials and staffing. In quasi-markets, regulations aim to balance innovation and diversity in educational offerings with the need for quality control and account-

ability. For example, regulations may encourage pedagogical innovation while also ensuring that schools adhere to national standards for student outcomes.

Support Services

These are publicly-provided services designed to enhance the effectiveness and efficiency of the quasi-market. Examples include information dissemination systems that help schools, teachers, parents and students make informed choices about educational offerings, but also publicly provided transportation, professional development programs and materials for teachers. Support services play a critical role in ensuring that quasi-markets function smoothly and that educational quality and equity are maintained.

6.2.2 Levin's Framework: Educational Outcomes

In applying Levin's evaluative framework to Dutch educational context, we can assess how the design of quasi-markets in education influences key objectives such as freedom of choice, productive efficiency, equity, and social cohesion. Each of these criteria reflects a different dimension of educational objectives and serves as a benchmark for evaluating the success of quasi-market systems.

Freedom of Choice

Freedom of choice in education primarily benefits individuals by allowing them to select schools that align with their personal values, beliefs, and preferences. This freedom is central to the argument for school choice policies, which advocate for giving households the ability to choose the best educational environment for their children. In a quasi-market system, freedom of choice is often achieved by offering a variety of educational providers – public, private, and hybrid – each with distinct curricula, pedagogical approaches, and educational philosophies.

Productive Efficiency

Productive efficiency refers to the ability to achieve the maximum educational outcomes for a given set of resources. In quasi-markets, this concept is particularly relevant, as competition between schools and providers of educational materials and professional training is expected to drive improvements in efficiency. If schools can operate more efficiently, they can deliver higher-quality education with the same or fewer resources, ultimately benefitting both individuals and society.

Equity

Equity in education is concerned with fairness and ensuring that all students have access to high-quality learning opportunities, regardless of their background. In quasi-markets, achieving equity can be challenging, as market mechanisms may exacerbate existing inequalities. Policymakers must carefully design financial and regulatory systems to ensure that disadvantaged students are not left behind and that schools serving low-income populations have adequate resources to provide a high-quality education.

Social Cohesion

Social cohesion refers to the role of education in fostering a sense of shared identity, values, and civic responsibility among students. In quasi-markets, there is a risk that school choice and competition could lead to social fragmentation, as students from different backgrounds may attend different schools. However, policies that promote inclusive curricula, shared civic goals, and diverse student populations can help mitigate this risk and enhance social cohesion.

6.2.3 Institutional Setup of Education in the Netherlands

The Dutch educational system is widely recognized for its unique balance between school autonomy and state oversight, firmly grounded in the legal framework of Article 23 of the Dutch Constitution. This Article provides schools with significant freedom to determine their educational offerings, methodologies, and internal organization, while placing certain boundaries on governmental interference in the educational offering. In other words, government regulations primarily focus on the inputs and outcomes of education, while the decision-making regarding managerial and educational processes is delegated to lower levels of authority (Karsten & Meijer, 1999). Specifically, all government-funded schools are required to adhere to central regulations concerning (i) admission policies, (ii) the national curriculum and attainment targets, (iii) national examinations at the conclusion of primary and secondary education, (iv) minimum qualifications, training, and salaries for teachers, and (v) quality control of the education delivered (Inspectorate of Education, n.d.-a).

While largely autonomous in terms of educational delivery, schools are held accountable for educational quality through a system of oversight by the Dutch educational inspectorate. Each year, the Dutch Inspectorate of Education identifies schools that are considered ‘at risk.’ The purpose of this process is to evaluate potential issues impacting the quality of education and

to monitor the progress of schools in implementing improvements. Schools that meet performance standards are not subject to the same level of intensive, risk-based inspection, enabling the Inspectorate to direct the majority of its resources toward improving underperforming schools (Inspectorate of Education, n.d.-a). This duality – significant school autonomy counterbalanced with accountability measures and transparency on school performance – largely defines the Dutch educational landscape.

Another critical aspect of the institutional setup is the concept of universal “freedom of school choice,” which allows parents to select a school that aligns with their preferences. Article 23 also enshrines this right in that anyone is free to open a school that aligns with their religious, ideological, or pedagogical convictions, within the boundaries of the institutional arrangements and requirements. In this pluralistic system, publicly funded schools are allowed to adopt different educational philosophies or religious denominations. Furthermore, the Education Inspectorate and governmental agencies provide information on the performance levels and characteristics of schools. Schools also organize information sessions that prospective students’ parents can attend to learn more about schools they are interested in. This allows parents to select schools not only based on their religious, ideological, or pedagogical beliefs but also on a limited set of objective indicators of school quality. As such, universal school choice adds another component of school accountability, since households are free to choose a different school (i.e., to “vote with their feet”) when unsatisfied with the educational offering. This characteristic is central to the quasi-market within the Dutch education system, as it is supposed to promote competition among schools to attract students, thereby driving improvements in quality and diversity of educational offerings beyond minimal standards set by the inspectorate.

This competition for students operates within a system of equitable allocation of funding to schools, regardless of their religious or ideological affiliation. Schools are funded based on enrollment numbers and an indirect voucher-type system, in which money follows the students and each school receives, for each student, a sum equivalent to the per-capita cost of public schooling (Patrinos & Psacharopoulos, 2004). Government-funded schools, regardless of whether they are privately run, are not allowed to charge tuition or have for-profit motives (Inspectorate of Education, n.d.-a). Schools are allowed to some extent to ask for voluntary contributions from parents, but only for extra-curricular activities (Inspectorate of Education Inspectorate, n.d.-b). Additional financial support is provided to schools serving disadvantaged populations or students with specific educational needs in primary and secondary education. Special-needs students are beneficiaries of a more generous pupil-specific funding

system that allows them to enroll in mainstream education or attend special primary or secondary schools.

This approach aims to mitigate inequalities and ensure that all students have equal access to high-quality education, regardless of their background. At the same time, this funding model introduces market-like dynamics, where schools must manage their budgets efficiently to maintain quality and compete for students.

6.3 The Dutch Quasi-Market for Teaching and Learning Methods

Having established the theoretical framework and institutional background as essential context for this chapter, we now turn to the main analysis: the application of Levin's framework to Dutch educational context. As outlined above, Levin identifies three key design instruments – finance, regulation, and support services – that shape the functioning of quasi-markets in different educational areas and can be used by governments to optimize educational outcomes. This chapter focuses on two³ of these design instruments: regulation and support services and examines its relevance for the case of quasi market for teaching and learning methods.⁴

6.3.1 *Quality Assurance: Insufficient Regulation due to Lack of Public Oversight*

One of the consequences of Article 23 (i.e., freedom of education) in the Dutch educational system is that the national curriculum is rather loosely defined, providing only minimal guidance for teaching and learning processes. The development of teaching and learning interventions in the area of literacy (or any other area) is typically outsourced to private and commercial entities, which operate within a quasi-market for educational goods and services. This dynamic extends beyond teaching and learning materials and include professional development services and assessment tools, all of which are integral

3 Our focus on regulation and support services reflects the fact that all schools in the Netherlands are almost entirely publicly funded. They receive resources based on enrollment and specific educational needs, with additional funding allocated to schools serving disadvantaged populations. By contrast, regulation and support services operate within a more complex institutional setup. Therefore, this analysis focuses on these instruments and the way they function within the quasi-market for teaching and learning methods and assesses their impact on key educational outcomes, such as freedom of choice, productive efficiency, equity, and social cohesion.

4 Similar analyses could be applied to professional development programs and assessment tools, but these are outside the scope of this chapter.

components of the educational process and have a direct impact on student outcomes. Consequently, in the Netherlands, the supply of these essential elements is fully shaped by quasi-market mechanisms. Private entities – such as publishers, educational consultants, ed-tech companies, and other stakeholders – play a dominant role in producing and distributing these resources. Schools, in turn, exercise considerable autonomy in selecting the materials and services that align with their specific educational goals.

In this context, the quality assurance of teaching and learning interventions available to schools in the area of language and literacy rests on several key assumptions. First, competition among public and private suppliers of educational interventions is expected to encourage innovation and diversity in the resources available to schools. Second, schools are assumed to have the contextual knowledge and skills needed to select the most appropriate interventions. Third, accountability mechanisms – such as the inspectorate and free school choice – are expected to prevent schools from making inefficient choices. Together, these assumptions underpin the proposition that market mechanisms like competition and choice will safeguard the quality of educational provision. In what follows we outline the arguments that contest this proposition by analyzing each of these assumptions. Then, we turn to the exploration of recent developments in this area in which we also present a case study that illustrates our main points.

Assumption 1: Diversity through Competition

The Dutch education market can indeed be characterized by a diverse supply of teaching and learning interventions in the area of language learning and literacy development provided by private publishers and other stakeholders, reflecting the competitive dynamics of the market. This diversity can be seen as a strength, as schools have access to a wide range of options. Yet, it also poses risks in terms of educational quality and equity. Whereas various specific (independent) quality marks and certifications exist (e.g. for educational advisors⁵ and providers of supplementary education⁶), and schools are advised to take these into account in their decision-making (Ministry of Education, Culture and Science, 2021), the Dutch decentralized system comes with a notable absence of public centrally organized oversight mechanisms guaranteeing that all materials and approaches meet certain standards required for yielding high-quality educational outcomes.

5 Onderwijsontwikkeling Nederland (n.d.)

6 Landelijke Vereniging van Studiebegeleidingsinstituten (n.d.)

Assumption 2: Schools' Decision-making Capacity

Freedom of choice functions effectively only if schools are capable of making well-informed decisions. This typically requires a deep understanding of the needs of their student population, the specific distinctions between various approaches for teaching and learning interventions, and their impact on learning outcomes. Yet, research by Neeleman (2019) indicates that school leaders in secondary education predominantly base their selection of teaching and learning interventions on tacit knowledge, intuition, and personal ideologies rather than evidence-based pedagogical practices. As such, many commonly implemented educational interventions cannot be expected to result in a substantial improvement in learning outcomes (Neeleman, 2019).

Assumption 3: Accountability and the Diversification of Assessment Tools

The quasi-market in Dutch education also extends to the assessment tools used to monitor and guide student learning. Historically, one provider played a dominant role in evaluating student performance through standardized exit exams. However, a recent introduction of multiple transition tests provided by six different suppliers has further fragmented the system. While this shift aims to foster competition and offer schools more choice, it also has created significant challenges. For instance, results from different test providers are not directly comparable, and preliminary results suggest it is challenging to ensure equivalence across tests, such that student performance may to some extent depend on the specific test selected by the school (CvTE, 2024). This raises concerns about the fairness and reliability of using these assessments as accountability tools, particularly since these student performance results are – among other criteria – used by the Education Inspectorate to monitor school quality.

Moreover, this commercialization of assessment providers comes at a time when the “what” – the core content and skills students need to master – is undergoing substantial revision. There are increasing concerns about the quality of language and literacy education, particularly reading instruction. Unlike in many other countries, in the Netherlands reading comprehension is treated as a separate subject. However, questions remain about whether what students learn in this subject – and what is assessed – adequately reflects broader literacy skills. For example, the methods used to measure reading comprehension in Dutch assessments differ significantly from the approaches used in international studies like PISA and PIRLS, leading to potential misalignment between national and global benchmarks. This concern has prompted a revision of the national curriculum's core objectives and reference frameworks for language

(SLO, 2025), which will, in turn, necessitate updates to assessment tools and teaching methods.

In conclusion, the combination of fragmented accountability, market-driven supply, and evolving curriculum standards highlights the systemic risks of relying on quasi-market mechanisms to assure quality and equity in the Dutch educational system.

6.3.2 Increasing Finance, Enhancing Support Services and Introducing Regulation

In response to increasing concerns about educational quality, equity and the decision-making capacities of schools, Dutch policy has aligned with global trends by emphasizing evidence-informed educational practices as the standard for quality of educational provision. One such example is the recent so-called Master Plan Basic Skills (in Dutch: “Masterplan Basisvaardigheden”), a large grant scheme designed to support schools improving their education through an evidence-informed approach.⁷

Moreover, the government has focused on enhancing support services through initiatives such as Ontwikkelkracht and the NRO (Netherlands Initiative for Education Research). However, it has also cautiously introduced stricter requirements as means of stricter regulations, exemplified by the NPO (National Program for Education) during the COVID-19 crisis, where additional funding for addressing cognitive and academic delays was contingent on the adoption of evidence-informed teaching and learning programs.

With regard to support services, these initiatives encourage schools to adopt teaching and learning programs backed by empirical evidence, each contributing in distinct ways. The NPO and NRO have largely operated as knowledge brokers, expanding the availability of information about evidence-informed teaching and learning programs and practices through the development of toolkits, guidance reports, and accessible resources for educators. Ontwikkelkracht, on the other hand, focuses on cultivating a culture of continuous development and research within schools, aiming to increase awareness of the value of evidence-informed teaching and learning programs and practices in driving sustainable school improvement.

Together, these initiatives aim to bridge the gap between research and practice. The main idea behind them is to provide schools with knowledge and reliable information to support the selection and implementation of teaching

⁷ For more information, see: Ministry of Education, Culture and Science (n.d.-a)

and learning programs and practices that are not only effective but also tailored to the specific contexts and needs of schools.

The Challenge of Context-Specific Evidence

The aim to improve quality through evidence-informed approaches comes with two specific challenges. First, there is a lack of evidence regarding the effectiveness of teaching and learning interventions for the Dutch educational context. Historically, investments in the development and evaluation of teaching and learning interventions in the area of language and literacy, particularly in effectiveness research, have been limited. This focus on context-specific evidence is crucial for several reasons. For example, research findings from other countries can be misleading when used as evidence for effectiveness in the Dutch context. Significant differences in student populations, institutional characteristics, and systemic variables, as well as cross-linguistic differences in phonological, morphological and syntactic complexity, necessitate locally relevant evidence to ensure applicability. Furthermore, not all Dutch education professionals have equal access to internationally validated teaching and learning interventions, further complicating their ability to adopt evidence-informed practices. As a consequence, there is a lack of systematically collected information in educational databases, making it difficult for schools to easily access reliable information on the effectiveness of specific interventions tailored to the Dutch (educational and linguistic) context.

The second main challenge is the lack of a clear, standardized definition of what exactly qualifies as “evidence-based” or “evidence-informed”. This ambiguity undermines efforts to promote a shared understanding and consistent application of these concepts. Without robust informational support and clear definitions, schools may struggle to differentiate between genuinely evidence-informed or evidence-based teaching and learning interventions in the area of language and literacy.

6.3.3 Case Study: Targeted Approaches for Addressing Language Delays

To illustrate dynamics of this challenge, this section examines the case of targeted approaches to address language delays in Dutch primary education. Targeted approaches refer to educational interventions specifically designed to address particular learning difficulties, in this case language delays, i.e., poor linguistic performance due to insufficient exposure (either quantitative or qualitative) to the language of education (i.e., Dutch). This domain is particularly critical given the persistent challenges highlighted by both national and international assessments as described above. These approaches typically

include specialized teaching methods, adaptive learning technologies, and diagnostic tools aimed at identifying students at risk of falling behind in language development. The overarching goal of such targeted interventions is to mitigate language delays through timely and personalized support, thereby improving language and literacy skills and overall academic performance.

An exploratory web search was conducted to identify targeted educational programs and practices designed to prevent or reduce language delays in primary education, thus exploring the quasi-market offer from the perspective of the “consumer” (i.e., the educational professional). The search strategy employed a wide range of keywords reflecting the diverse terminology used in the field, including terms such as “intervention,” “approach,” “program” and “method,” combined with domain-specific terms like “language delay,” “writing skills” and “reading instruction.” In addition, websites from knowledge institutions, expert organizations, educational advisory agencies and publishers were reviewed.

Figure 1 provides an overview of 43 targeted approaches that were identified through this web search (presented anonymously, as our aim is not to critically review specific programs or practices but to paint a more general picture). This non-exhaustive list only includes approaches for which a detailed description in terms of their pedagogical methods, materials, and implementation requirements was available online. Note that the absence of a detailed online description does not necessarily indicate that such information is non-existent for particular programs or practices, but underscores the challenges educators face in accessing and evaluating these resources.

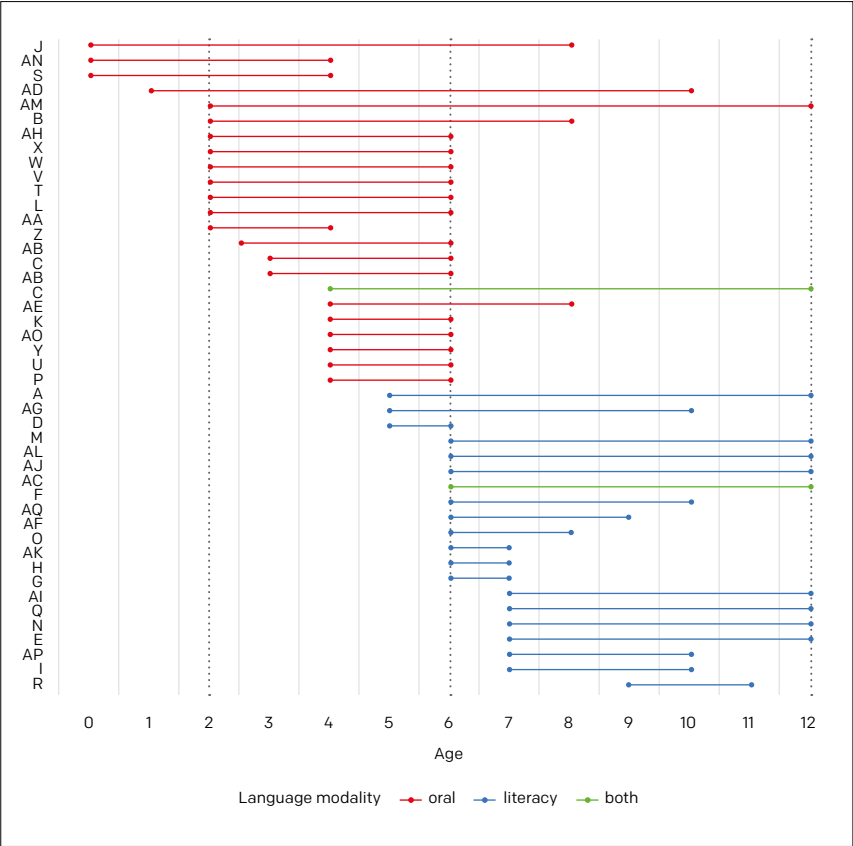


Figure 6.1 Overview of marketed approaches addressing language delays as identified through the web search. Red lines represent approaches addressing oral language skills; blue lines represent approaches targeting literacy skills; green lines represent approaches targeting both oral language and literacy skills. The length of the lines specifies the age range of the pupils targeted.

Over half of the identified approaches focus on improving oral language skills (i.e., speaking and listening) of preschoolers (<6 years of age). These include early childhood education (VVE) programs – addressing not only linguistic, but also socio-emotional, cognitive and motor development – as well as language-specific programs. For school-aged children, targeted approaches almost exclusively address literacy skills, most of which were originally developed for pupils with language disorders (such as dyslexia). Several websites explicitly mention the suitability of the approach for pupils with language delays without providing a clear motivation. Given that language difficulties due to insufficient exposure are typically not limited to a specific domain or

modality (Trioen et al., 2021), it is left to the educational professional to decide whether their pupils will benefit enough from such specialized approaches.

Next, for all of the identified approaches, we looked for evidence supporting their effectiveness. Evidence claims were found on the majority of websites (e.g., “proven effective,” “a proven method,” “proven effective both scientifically and in practice,” “scientifically substantiated,” “based on research”), suggesting that suppliers respond to the growing emphasis on evidence-informed education. However, it is not always clear what type of evidence is referred to, or how the claim is to be interpreted (e.g., “the effectiveness of the program has been established by meta-research,” “many research results have proven the effectiveness of the method,” “an effective program, based on scientifically substantiated principles,” “this means that the desired goals are really reached”).

To better understand and verify these claims, we evaluated the underlying sources of evidence. This exercise revealed that the availability of robust evidence for the effectiveness of the targeted approaches varied significantly. For the majority of approaches, we were unable to find experimental or quasi-experimental evidence supporting the claims, either because no sources were cited – which implies that no effectiveness study has been performed – or because cited sources were unavailable and therefore unverifiable. For some approaches, claims were based on evidence from effect studies performed in other countries and/or with different target populations, whereas the marketed approach itself has not been experimentally investigated. Moreover, eleven approaches are included in the Database Effective Youth Interventions of the Netherlands Youth Institute (henceforth NJI; Nederlands Jeugdinstituut, n.d.) – indicating that these were reviewed and recognized by an independent body; however, nine of these were not recognized as “effective,” but qualified as “well substantiated” due to a lack of experimental evidence. Seven approaches are being experimentally investigated at the time of writing; results are not yet available.

Only eleven approaches were found to be experimentally or quasi-experimentally evaluated. Nine studies showed a positive effect on some aspect of linguistic performance; results from the other two studies provided no evidence for effectiveness. For a proper assessment of the quality of the evidence in terms of reliability and validity, a more critical review of the methodological details (e.g., sample size, sample characteristics, study design) would be needed, but this is beyond the scope of this chapter.

In sum, this case study highlights several challenges related to evidence evaluation and quality assurance in the market that make it difficult, if not impossible, for educators to adequately assess whether specific approaches

really are evidence-based or informed (see frame below). This situation complicates the decision-making process for practitioners, and raises questions about the transparency and accountability of providers in the market.

Challenges in Evaluating Evidence

Accessibility of Evidence

Inconsistency in whether and how providers present evidence:

- Not all providers make evidence claims about their marketed approach; some approaches are not marketed at all
- Evidence claims lacking source citations
- Cited sources unavailable

Evidence Terminology

- Claims conflating different types of evidence:
 - “an effective program, based on scientifically substantiated principles. This means that the desired goals are really reached”
 - “the effectiveness of the program has been established by meta-research: the theory of change by [X]”
- Ambiguous communication about independently recognized approaches:
 - The recognition body distinguishes between “effective” and “well-substantiated” interventions based on the type of evidence available, but includes all recognized approaches in the same “database of effective youth interventions” regardless of recognition level
 - Providers of recognized approaches leave the recognition level unspecified (“included in the database of effective youth interventions”) or conflate the recognition levels in their marketing materials (“[Netherlands Youth Institute] qualifies it as effective and moreover as ‘well substantiated’”)

Quality of Evidence

A proper assessment of the quality of experimental evidence (in terms of reliability and validity) requires skills that not every educational professional possesses

6.4 The Dutch Quasi-Market of Interventions and Educational Outcomes

In this section, we evaluate the potential implications of the Dutch quasi-market for teaching and learning interventions in the area of literacy on the various educational objectives: freedom of choice, productive efficiency, equity, and social cohesion. For each outcome, we describe the specific ways in which the – interplay between – various design instruments (i.e., finance, regulation and support services) contribute to or impede these outcomes.

6.4.1 Freedom of Choice

Freedom of choice is a cornerstone of the Dutch education system, enshrined in Article 23 of the Constitution, which allows parents to select schools aligned with their values, beliefs, and pedagogical preferences. This principle extends into the quasi-market for teaching and learning interventions, where schools are empowered to choose resources that align with their educational goals.

As discussed earlier, the competitive dynamics of the quasi-market foster a diverse supply of teaching and learning interventions, enabling schools to tailor their educational offerings. This diversity is particularly evident in the variety of language and literacy interventions available, from methods targeting early language development to tools designed for addressing literacy challenges in older students. Such options theoretically enhance schools' ability to meet the diverse needs of their student populations, supporting the principle of choice.

However, this freedom is constrained by the lack of standardized evaluation criteria for teaching and learning methods, which complicates schools' ability to make informed choices. Without clear, reliable evidence, schools may rely on marketing claims rather than rigorous evaluations, potentially leading to suboptimal decisions.

Therefore, the freedom of choice for schools could be further moderated by government involvement. A specific example is provided by the recent National Education Program (“Nationaal Programma Onderwijs”), which was launched in response to the educational disruptions caused by the COVID-19 pandemic. Its main goal was to address learning deficits and promote the recovery of students who were significantly impacted by school closures and remote learning. The program focuses on improving educational outcomes through targeted approaches, such as extra teaching time, personalized support, and investment in digital resources. It also aimed to strengthen the mental well-being of students and support teachers in their professional development. The program

ran from 2021 to 2024 and was supported by significant government funding. A key requirement of the program was that the targeted approaches implemented had to be evidence-based. To that end, a list (in Dutch: “menukaart”) that was largely based on the Teaching and Learning Toolkit of the Education Endowment Foundation (EEF) was constructed as a curated collection of (international) evidence-based educational interventions and strategies that schools had to choose from to address the learning gaps caused by the COVID-19 pandemic (Ministry of Education, Culture and Science, n.d.-b). While aiming to ensure that these additional public resources are spent effectively, this requirement restricted options available to schools. Furthermore, important challenges have been identified regarding the focus of options listed, the quality of evidence available, together with issues in ensuring and monitoring the quality of implementation (e.g., Scheerens & Kirschner, 2021); especially with such a relatively short window in which the resources had to be spent (e.g., Kersten, 2021).

6.4.2 *Productive Efficiency*

The system of learning goals in Dutch compulsory education is structured around core objectives that outline the essential knowledge and skills students should acquire at each stage of their schooling (reference levels in primary education, final attainment targets in secondary education). Whereas it remains unclear whether a school’s performance as indicated by these reference levels and attainment targets are valid indicators of quality, these learning goals apply to all publicly funded schools in primary and secondary education, aiming to ensure consistency and quality across schools. The competition inherent in the quasi-market aims to incentivize providers of teaching and learning interventions to develop efficient and effective educational interventions geared towards realizing these core objectives. The implicit argument is that schools will choose the most cost-effective programs that deliver the highest impact on student outcomes. This dynamic should thus enhance productive efficiency by encouraging the adoption of innovative teaching methods and technologies that maximize these educational results within existing resource constraints. Notwithstanding the potential validity concerns with respect to whether the reference levels and attainment targets are in fact objective quality measures, in order for a quasi-market to realize such improvements on these results, it is important to recognize the relevance of “market transparency.” What this entails is that if schools have access to accurate and timely information about prices, effectiveness, and availability of teaching and learning programs and practices, this will lead to more informed decision-making.

Such level of transparency is not realized in the Dutch educational system, as highlighted in paragraph 3, thereby creating market inefficiencies. The lack of robust public quality assurance mechanisms with binding consequences allows for potentially ineffective programs to persist in the market, diverting resources from more impactful interventions. Additionally, the duplication of efforts among providers offering similar programs leads to inefficiencies, as schools spend time and money navigating overlapping options. Finally, the commercial interests might be driving the development of educational materials by private providers. While private providers are arguably also committed to improving educational outcomes, there is a risk that additional motives such as increasing market share and reducing costs may not always be perfectly aligned with private and public objectives of high-quality education. These concerns would call for stronger government oversight and increased support for public-sector involvement, for example through imposing strict quality standards on what constitutes evidence of effectiveness in the Dutch educational context.

6.4.3 Equity

The Dutch government's commitment to equitable funding and the provision of additional resources to schools serving disadvantaged populations can mitigate risks with respect to educational equity. The quasi-market structure, with its emphasis on school choice and competition, has the potential to exacerbate inequalities if disadvantaged schools lack the resources or capacity to implement high-quality teaching and learning interventions. A recent OECD report examines the equity-related indicators within the Dutch education system (Sarvik, 2024). While it does not explicitly label the system as “highly segregated” by socio-economic status, it does highlight persistent disparities. These findings suggest that the Dutch education system faces challenges in achieving equitable outcomes for students from diverse socio-economic backgrounds.

This highlights the importance that schools serving challenging student populations have not only the resources but also access to the information and capacity required to implement, for example, high-quality targeted approaches addressing language delays. This is particularly relevant since, although participation in early childhood education and care is high among children between ages 3 and 5, persistent immigrant gaps are evident. It is important to ensure that all students have access to high-quality language and literacy education from a young age onward, regardless of their socio-economic or immigration background. Only then can the quasi-market promote greater equity in educational outcomes.

With universal school choice, the Dutch quasi-market allows families to select schools that align with their preferences, but this often also correlates with socio-economic resources. Moreover, the ability to choose schools that align with specific cultural or religious values can lead to segmentation along ethnic or cultural lines. Households with an immigrant background and other minority families may concentrate in particular schools, exacerbating divides and reducing interaction among diverse groups. Funding which is largely based on enrollment can incentivize schools to attract students from relatively advantageous backgrounds, potentially marginalizing those who require more support, such as students with learning disabilities or those from disadvantaged backgrounds. Care must thus be taken to ensure that freedom of choice does not lead to the fragmentation of student populations along socio-economic or cultural lines. Moreover, a system that emphasizes competition can dilute the focus on shared public objectives of education, such as promoting civic education, tolerance, and mutual understanding.

Schools may prioritize educational methods that focus mostly on improving academic outcomes at the expense of fostering social integration. This can call for more government involvement, for example by imposing quality standards on educational methods. In the case of language education, particularly those educational methods that emphasize inclusive and culturally responsive teaching can contribute to social cohesion by ensuring that all students – regardless of their background – are literate, participate, and have the ability to succeed. When the government introduces finance schemes, regulations or support services that promote addressing language delays early on with inclusive educational methods, this can help prevent the marginalization of students who struggle with literacy, thereby promoting a more inclusive educational environment and improving societal participation.

6.5 Conclusion and Discussion

The Dutch education system can be largely described as publicly funded and privately operated. Acknowledging that education serves both public (societal) and private (individual) interests, it is important to understand how the policy instruments finance, regulation and support services play out in safeguarding these distinct objectives. The quasi-market for teaching and learning methods in language and literacy education exemplifies the complex interplay between autonomy, competition and accountability.

While this model facilitates opportunities for innovation and diversity, it simultaneously presents significant challenges, particularly concerning quality assurance, equity, and social cohesion.

An analysis of targeted approaches for addressing language delays reveals critical deficiencies and opportunities within the regulatory and support structures underpinning this quasi-market. Regulation and support services, as foundational design instruments, are pivotal in optimizing the market's functionality to ensure equitable access to high-quality educational outcomes.

A central finding is the inadequacy of the current regulatory framework in ensuring the adoption of effective educational interventions. The absence of standardized definitions for “evidence-based” and “evidence-informed” practices undermines both transparency and accountability, enabling providers to employ these terms inconsistently. This lack of clarity compromises trust within the market and impedes schools' ability to differentiate between interventions that are genuinely effective and those that merely claim such status. Furthermore, the fragmented and often inaccessible nature of robust evidence exacerbates the challenges faced by schools, which frequently lack the informational and professional resources necessary to critically evaluate available interventions.

To address these limitations, a strategic recalibration of the Dutch quasi-market is needed to align it more closely with the overarching goals of freedom of choice, productive efficiency, equity, and social cohesion. A crucial step in this process would be the development of a national evaluation framework for teaching and learning interventions. Such a framework, while arguably challenging to create, implement and monitor, should articulate clear and standardized criteria for evidence-based and evidence-informed practices, ensuring transparency and accountability while providing schools and providers with accessible guidance.

In addition, enhanced support services are necessary to empower schools, particularly those serving disadvantaged populations. These services should encompass professional development opportunities, tailored guidance on selecting resources, and practical tools for the effective implementation of evidence-informed practices. Furthermore, fostering ecosystems for collaboration among schools, research institutions, and intervention providers is imperative. Such partnerships would enable the co-development and rigorous testing of pedagogical methods that are both effective and contextually relevant, bridging the persistent gap between research and practice. This echoes an important advice from 2019 made by the Dutch Education Council to promote collaboration between schools and intervention providers (Onderwijsraad, 2019).

By addressing these systemic challenges, the Dutch quasi-market can be better positioned to balance the competing demands of innovation, diversity, and accountability. Such reforms would not only enhance an educational market's capacity to deliver equitable and high-quality educational outcomes, but also strengthen its role in supporting the broader societal objectives of education.

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7 The Impact of Supplementary Education on the Publicness of Dutch Secondary Education from the Perspective of Educational Professionals

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Abstract

Private supplementary education (e.g., tutoring), commonly referred to as shadow education, has been on the rise in the past 15 years in Western Europe. This rise in shadow education can be seen as part of a broader trend of increased marketization in education. Research has indicated that this increased marketization may impact several aspects of the publicness of education. In the Netherlands, schools and the government have been urged to protect the publicness of education in light of these developments, including shadow education. In this study, standards for publicness as set by the Dutch Education Council are compared to perspectives of 29 educational professionals from Dutch secondary schools obtained with individual and group interviews. Results indicated that supplementary education was perceived to have an impact whether organized internally or externally, but it differs per criterion of publicness whether the impact was perceived as positive or negative. The impact on economic goals and relatability was generally perceived as positive, while the impact on quality and involvement of educational professionals was perceived as mixed to negative. The impact of shadow education on accessible education and equality of opportunity was perceived as negative. It is recommended to further study potential negative impacts of supplementary education on educational quality, accessibility, equality of opportunity, and involvement of educational professionals, with a focus on how to combat

negative effects. In addition, the impact of supplementary education on the public perception of public education should be critically explored.

7.1 Introduction

Education outside of the regular curriculum is becoming increasingly prevalent. In some countries, supplementary educational activities like private tutoring have a long-standing tradition (e.g., various East Asian countries, Greece), while in most Western European countries there has been a noticeable increase in supplementary education in the past 15 years (Bray, 2021; Park et al., 2016). *Supplementary education* can be defined as all forms of education that are additional to the regular educational curriculum, while *shadow education* is the often-used term for private supplementary education (e.g., Bray, 1999; Byun et al., 2018; Grodsky, 2010). The increase in supplementary and specifically shadow education in Western Europe can be seen as part of a broader trend of increased marketization in education (Bray, 2021). The neoliberal political climate in most Western-European countries has shifted the focus from the common good to market logic, meaning that the focus is on customer satisfaction, individual customer demands and trying to meet these demands for the lowest possible price (e.g., Biesta & Säfström, 2023; Haque, 2001).

The impact of these developments has primarily been studied with a focus on *shadow education*, rather than *supplementary education* in general (Park et al., 2016). Studies have mainly investigated the impact on academic performance. The results of these studies have been mixed (e.g., Bray & Lykins, 2012), although consistent positive effects have been found for high-intensity tutoring in small groups (Diris & Fairley, 2024). Determining the impact of shadow education on academic performance is complicated, partially because of difficulties arising due to the many forms of supplementary education (Park et al., 2016). It is further complicated by selection bias in participation in shadow education, which makes it difficult to untangle effects of tutoring from effects of context factors like socio-economic status (SES; Luo & Chan, 2022). Furthermore, the impact of shadow education on other factors, such as wellbeing or self-confidence, has hardly been studied (Elffers et al., 2021).

In this chapter, we propose a different approach to researching the impact of the rise of supplementary education. Taking our cue from researchers that indicate that neoliberalism (e.g., Biesta & Säfström, 2023) and specifically the marketization of education (e.g., Bray, 2021) are eroding the nature of the public service or public education provided by schools, we intend to map the perceived impact of supplementary education on the *publicness* of education.

While researchers have addressed the impact of neoliberalism, privatization and marketization on the publicness of education (e.g., Biesta & Säfström, 2023; Burch, 2009), the impact of supplementary education on the publicness of education has not been studied yet.

The issue of publicness in light of the rise in supplementary education is currently an urgent matter in the Netherlands, where the use of supplementary education has become relatively normal, with about 30% of students in secondary education making use of some form of supplementary education (van den Berg et al., 2023). Moreover, during the past decade, shadow education has become increasingly intertwined with the educational programs of Dutch publicly funded schools, for example, in terms of funding, learning goals, and ownership. An increasing number of secondary education schools have structural collaborations with providers of shadow education (Elffers & Jansen, 2019; Onderwijsraad, 2021). These developments have led the Dutch Education Council (Onderwijsraad, 2021) to recommend the Dutch government and educational institutions to better protect the *publicness* of education, indicating shadow education is putting pressure on this publicness. However, currently, the government lacks a clear and coherent view on this publicness (Onderwijsraad, 2021). In research, definitions of publicness vary depending on the context and discipline. The phenomenon can be studied from a sociological or philosophical lens, but scholars may also take an economic, pedagogical or political science perspective. Because of the contested nature of the concept, researchers sometimes use criteria to assess the extent of publicness (e.g., Haque, 2001), rather than define exactly what publicness is.

To understand the impact of supplementary education on the publicness of education, we need more conceptual clarity, and need to explore the effects of supplementary education on the publicness of education. This raises the following question: “To what extent is supplementary education reshaping the publicness of Dutch secondary education?” In the Netherlands, supplementary education is more prevalent in secondary education (van den Berg et al., 2023) and more intertwined with regular education compared to primary education (Onderwijsraad, 2021). This study will therefore focus on secondary education.

To answer this question, we first consider the question “What is the place, role and scope of supplementary education in Dutch secondary education?” to understand what the landscape of supplementary education currently looks like. While some research has been conducted into supplementary education in Dutch secondary education, knowledge about the role and scope of supplementary education is still limited (Elffers & Jansen, 2019). Moreover, much of the research on supplementary education focuses on shadow education (Park et al., 2016), while supplementary education and interactions between the two

remain understudied. We will therefore first address the place, role, and scope of supplementary education in Dutch secondary education. We then answer the question “How do educational professionals in Dutch secondary schools understand publicness?” to gain insight into educational professionals’ understandings of publicness of education in relation to supplementary education. The characteristics and conditions of publicness of education, as set out by the Education Council (Onderwijsraad, 2021), form our framework for researching this second question. Finally, we will use this framework to answer the question “To what extent is supplementary education reshaping the publicness of Dutch secondary education from the perspective of educational professionals?”

In this study we combine a normative perspective on the publicness of education with empirical perspectives of educational professionals, including teachers, school leaders, and support staff. There are a number of reasons why educational professionals’ perspectives are important to consider. Biesta and Säfström (2023) argue that education takes place *first and foremost* in daily practices of teachers through curriculum and pedagogy. Since schools in the Netherlands have considerable freedom to design their curricula, educational professionals play a significant role in shaping school policy and practice. Teachers’ perspectives on shadow education have been understudied compared to students’ perspectives (Yu & Zhang, 2022), and have not been comprehensively studied in the Dutch context (Elffers & Jansen, 2019). Initial explorations indicate teachers worry about supplementary education negatively impacting equality of opportunity, increasing performance pressure for students, increasing work pressure for teachers, and negatively impacting the societal positions of teachers (CNV Onderwijs, 2017). Teachers also worry about the impact of supplementary education on students’ behavior in class (Elffers & Jansen, 2019). Moreover, since supplementary and shadow education may take place inside the school, with about 80% of secondary schools offering a form of supplementary education (van den Berg et al., 2023), educational professionals are often involved in decisions and practice surrounding supplementary education, and are therefore knowledgeable stakeholders.

This chapter aims to give insight into the impact of supplementary education on the publicness of education. We will first introduce our theoretical framework, where we discuss perspectives on publicness, the Dutch context, supplementary and shadow education and the Dutch Education Council and their framework for publicness. We then move to the methodology of this chapter. Next, we address the research questions in the results section. Finally, we end with our conclusions, implications and recommendations for future research.

7.2 Theoretical Framework

7.2.1 Perspectives on Publicness

To understand the publicness of education, it may be helpful to look at developments in thinking about publicness. Waslander (2021) distinguishes three perspectives through which publicness has been approached in previous research. In the first perspective, a distinction is made between organizations that *function in the public sphere and organizations that function in the private sphere*. This perspective focuses on the practical organization of publicness: who is funding activities, and who is organizing them? This approach, however, takes a dichotomous perspective on public and private spheres, and therefore does not apply well to organizations that exist somewhere between the public and private spheres. It thus cannot be used to understand all organizations.

These critiques on the dichotomous perspective led to the second perspective, which uses (usually two) dimensions (e.g., financing and governmental/political influence) to indicate the degree of publicness, based on the work of Bozeman (1987). For example, financing can be defined as whether an organization is financed by the government or by the private sector. By using two or more dimensions, organizations can be placed somewhere on a grid of publicness, to understand the publicness of an organization. This way of thinking uses *public and private elements, rather than public and private spheres or sectors*.

The third perspective is a normative perspective, *where the focus is more on the public value, or added value, that an organization provides to the public*. In response to rising inequalities in society, views on publicness of sectors and organizations started to emphasize normative questions, for example: “What should we want for society?” From this perspective, added value is more important than the setting of the organization (i.e., its position on a grid of publicness, or the origins of its funding). There are different normative perspectives on publicness, with common themes but different focal points. Biesta and Säfström (2023) describe public education as the expression of the values of democracy (i.e., liberty, equality, solidarity) while also having a key role in the promotion of these values, whereas others put a focus on equal opportunities, individual flourishing, and personal autonomy (e.g., Brighouse et al., 2018).

7.2.2 Publicness of Education: The Dutch Context

To understand the publicness of education within the Dutch context, two aspects of Dutch education must be introduced: the structure of the Dutch educational system and the funding structure of Dutch education. Dutch sec-

ondary education starts at Grade 7 and consists of six educational tracks. In Grade 7, children are placed into one track, or a combination of two adjacent tracks. This selection is relatively early compared to other countries. Students may switch to a higher or lower track on the basis of their grades (e.g., if students maintain high grades, they can be allowed to move up a track; if students have failing grades, they may be moved down a track). The initial track in which students are placed is a strong predictor of the diploma students will ultimately obtain (e.g., Tolsma & Wolbers, 2010).

Another important aspect of Dutch education is the funding structure. In 1917, equality between public and religious schools was established in the Dutch Constitution. Schools receive government funding as long as they meet basic qualifications (e.g., educational quality, qualified teachers, sufficient number of teaching hours, sufficient number of students; Onderwijsraad, 2012; Wet op het primair onderwijs, 2025; Wet voortgezet onderwijs, 2020, 2025). Since most private schools in the Netherlands are publicly funded, the Dutch context differs from that of countries such as the United States or the United Kingdom, where there is a clearer division between public and private schools in terms of funding. In the Netherlands, the terms private school or private education are generally reserved for government-independent schools that ask for larger sums of money from parents (e.g., up to EUR 20,000) to offer smaller classes or special types of education (Cloin, 2024). This private sector in Dutch education has remained relatively small in comparison to other countries, while the range of options in terms of publicly funded schools is relatively large (Waslander, 2021).

7.2.3 *Supplementary and Shadow Education*

While shadow education has historically not been as visible in Western European countries such as the Netherlands, other countries (e.g., Japan, Korea) have long-standing and well-documented traditions of shadow education (Park et al., 2016). In 1992, shadow education was described as “a set of educational activities outside formal schooling that are designed to improve a student’s chances of successfully moving through the allocation process” (Stevenson & Baker, 1992, p. 1640). Since then, the definition has evolved. While most studies focus on private *tutoring* (e.g., Bray, 1999; Bray & Lykins, 2012), the number of forms of shadow education has expanded (Byun et al., 2018), and the broader definition has been expanded to include various other forms. Many authors now use the term shadow education as a term for private supplementary education (Byun et al., 2018; Jansen et al., 2023). *Private* is generally defined as tutoring provided for a fee (Zhang & Bray, 2020). Park et al. (2016) distinguish

between *shadow education* as “private supplementary education activities” and *supplementary education*, which includes activities that constitute “public learning activities outside of regular schooling” (p. 234). However, there is a blurring of boundaries on several aspects of the definition of supplementary education, including on how to define private and which activities are in- and excluded in the definition of supplementary education (Zhang & Bray, 2020).

The distinction between internal and external or public and private supplementary education is often not clear-cut in practice, especially in the Dutch context. Supplementary educational activities fall on a spectrum from public to private, with many activities falling somewhere in between. For this chapter, we use the following working definitions to be able to discuss the perceived impact of more public and more private forms. We use *supplementary education* to address all supplementary education, *internal supplementary education* to specifically address activities organized and carried out or taught by the school and *shadow education* to address supplementary education that is externally supplied, whether organized inside a school or at an external location.

In the Netherlands, several forms of supplementary education have been identified: tutoring, exam training, homework support, support of learning needs, training/coaching, and talent development (Elffers et al., 2019). Students with more highly educated parents were more likely to use paid supplementary education, while students with less-educated parents more often used free options (de Geus & Bisschop, 2017). Both paid and unpaid forms of supplementary education may occur in schools. The majority of schools that organize supplementary education finance these activities themselves (van den Berg et al., 2023). In recent years, funding made available by the government to combat COVID-related learning delays (van Engelshoven & Slob, 2021) was frequently used to finance supplementary education (e.g., Hagen, 2022). Since 2019, there has been a slight downward trend in the use of supplementary education in schools (84% of schools offered at least one form of supplementary education in 2019, 81% did so in 2023; van den Berg et al., 2023). Discussions on the impact of shadow education usually center around its impact on equality of opportunity (Elffers & Jansen, 2019). Supplementary education that is accessible to all could potentially form a buffer to unequal access to paid supplementary education, but it is currently unclear whether unpaid forms are effective (Elffers et al., 2021). In primary education, because of the low overall effectiveness, supplementary education might not impact equality of opportunity (Diris & Fairley, 2024).

One body that has been monitoring the developments in supplementary education in the Netherlands is the Dutch Education Council. The Education Council is an advisory body that provides the government and parliament with recommendations for policy in the form of evidence-based studies and advisory reports. Their recommendations are based on educational policy and legislation, scientific insights and educational professionals' experiences. The council is autonomous, meaning they can provide recommendations both on request and on their own initiative (Onderwijsraad, n.d.).

Because of the increasing visibility of shadow education, increase in use of private education and increasing entanglement of public and private in education, the Education Council wrote a plea to better protect the public character of education. This report, *Publiek Karakter Voorop* (Public Character First; Onderwijsraad, 2021), was written on their own initiative. The report describes five characteristics that, according to the Education Council, together form the publicness of education and sets out why it is essential and urgent to protect these.

(1) Public education benefits all citizens

Public education explicitly concerns itself with societal goals. These are formulated as follows: economic goals (educating the next working generation, contributing to economic growth and prosperity), democratic goals (stimulating collective, democratic values and improving the functioning of the parliamentary democracy), and finally equality goals (giving those who were not born into rich families the opportunity to flourish through education). Additionally, since (almost) all young people go to school, this shared experience adds to social cohesion.

(2) Public education is relatable to students and their parents

Public education needs to be relatable to students and their parents. Education is by and for everyone, meaning students need to relate and feel welcome. Education meets this criterion when as many students as possible can and want to make use of public education. Students and parents need to feel able to trust that public education will ensure individual positive outcomes; otherwise, they might feel inclined to use private alternatives. When parents and students are confident that public education gives them the necessary skills and a valuable diploma, they are not likely to search for private education alternatives.

(3) Public education is open to all

Public education needs to be open to all, without financial barriers. This openness is also seen in equal appreciation for the educational tracks in the Dutch system; for example, we value students from each track equally.

(4) Public education gives expression to collective, democratic values

Public education gives expression to collective, democratic values. While this may be explicitly expressed through citizenship education, school also forms a mini-society in which young people learn to live and work together in a democratic way. They also learn to weigh public versus private interests.

(5) Public education shows these democratic values by living by them

Public education embodies democratic values and democratic procedures. This manifests throughout the different levels of educational governance, from governmental rules creating guidelines for schools and school boards following laws, to teachers and school leaders in their involvement in school policy and their interpretation of the educational program. School leaders and teachers need to be democratically involved in decision-making processes in the curriculum in order to be able to be responsible and held accountable for these decisions.

The report of the Dutch Education Council (Onderwijsraad, 2021) also formulates three conditions that are indicative of the extent of publicness. If these conditions are not met, public education cannot meet the intended societal goals (i.e., economic outcomes, democratic outcomes and contributing to equality of opportunity). The report also notes that quality and accessibility are currently at risk, and that the involvement of educational professionals is currently under pressure.

(1) Quality

The public character of education is shaped by how schools organize the quality of their education. Quality decides the relatability to and interest of parents, and is decided by the democratic values of education. Quality is not static: society is changing, and this changes needs, interests and expectations of students and their parents. This may influence the quality and the public character of education.

(2) Accessibility

The extent of publicness also hinges on the possibility for everyone to participate in public education. Moreover, equal suitability should lead

to equal access. Chances of a successful educational career should not be dependent on the societal position or wealth of parents. Public education with a public character contributes to improving equality of opportunity.

(3) Involvement of educational professionals

A condition for a strong public character is that educational professionals are involved in and have control over accessible and qualitatively strong education. It is undesirable that private suppliers offer forms of education that educational professionals have no insight into and say over. Without insight and control, educational professionals cannot be responsible for education. It is therefore necessary to not hand over involvement and control to private suppliers.

7.3 Method

7.3.1 Design

This chapter used a cross-sectional, qualitative design using interviews. The data consisted of semi-structured individual or group interviews with educational professionals about their use and opinion of supplementary and shadow education.

7.3.2 Participants

The sample included 29 educational professionals, 12 (41%) of whom were teachers and 13 (45% of total) were school or department leaders; 62% of participants in leadership roles also had teaching tasks. Two of the other participants coordinated support for students in the school, and the other two were teaching assistants. Eighteen participants (62%) were women. Educational professionals were recruited from 14 schools. These schools were spread throughout the Netherlands, with different levels of rurality, and offered different educational tracks from pre-vocational education to pre-university education.

7.3.3 Instruments

The data were collected through semi-structured individual and group interviews. The interview guide was developed specifically for this study and consisted of two sections. The first section surveyed the supply and use of supplementary education, asking further clarifying questions about each form,

based on six forms of supplementary education in the Netherlands identified by Elffers et al. (2019): tutoring, exam training, homework support, support of learning needs, training/coaching, and talent development. These forms were supplemented by two additional forms of supplementary education: interactive online software and online materials. Examples of questions are: “Is tutoring organized within your school?” and “What is the goal of tutoring?” The second section of the interview guideline consisted of questions about the opinions of participants, discussing the benefits and drawbacks of supplementary education, its place in society and its role in the publicness of education and equality of opportunity. Examples of questions are: “What are positive aspects of supplementary education?” and “In an ideal world, how would you imagine the role of supplementary education?”

7.3.4 Procedure

The interviews took place from March 2023 until July 2024. Data collection was approved by the Ethics Committee of the Faculty of Behavioural and Social Sciences at the University of Groningen in December 2022 (PED-2223-S-0028). Schools were recruited via email and personal networks of the researchers, and asked to provide a mix of teachers and school or department leaders for the interviews. Interviews were conducted in a group of two or three educational professionals per school (five interviews with three participants, five with two participants) or one-on-one for schools with only one participant (four interviews). Interviews were held in person unless participants preferred otherwise. This was the case in three out of the 14 interviews, two of which were held over the phone, one of which was held online. All in-person interviews took place at the school where the educational professionals worked, in a calm, closed-off space. Interviews took between 38 and 82 minutes (62 minutes on average).

7.3.5 Data Analysis

The interviews were transcribed in full. First, an overview was made of the current landscape of supplementary education. Next, thematic analysis (e.g., Braun & Clarke, 2006) was used to get an in-depth understanding of how educational professionals conceptualize aspects of publicness of education within the context of supplementary education. Deductive coding was used, based on pre-coded themes from the framework of the Education Council (Onderwijsraad, 2021). The framework consists of a combination of multiple perspectives on publicness. Criteria aligned with Waslander’s (2021) instrumental (e.g., focus on parents’ wishes and economic outcomes) and normative perspec-

tive (e.g., accessibility, equality of opportunity) are included. This framework offers eight criteria in total. Because some themes overlapped and some criteria included multiple themes, the criteria were regrouped into seven themes for the analysis. The changes are set out in Table 7.1. Finally, thematic analysis was used to assess to what extent supplementary education reshapes publicness from the perspective of educational professionals. To do so, deductive coding was used based on the analytic framework as described above.

Table 7.1 Operationalization of the criteria of publicness from the Education Council (Onderwijsraad, 2021) criteria into the framework for this chapter

Education Council	Changed how?	This chapter
1. Public education benefits all	Split	1. Democratic goals
		2. Economic goals
		5. Equality of opportunity
2. Education is relatable to students and their parents	Unchanged	3. Relatability
4. Public education gives expression to collective, democratic values 5. Public education shows these democratic values by living by them	Combined	1. Democratic goals
3. Public education is open to all 7. Accessibility	Combined	4. Accessible education
6. Quality	Unchanged	6. Quality
8. Involvement of educational professionals	Unchanged	7. Involvement of educational professionals

7.4 Results

7.4.1 The Place, Role and Scope of Supplementary Education

Since interviews were conducted starting March 2023, one influential factor was government funding that was made available for schools to combat COVID-related learning delays (van Engelshoven & Slob, 2021). Schools indicated that they used these funds to increase their existing use of shadow education, that they contracted new suppliers of shadow education or used the funds to organize supplementary education internally. At the time of the interviews, many schools had started reflecting on their use of these funds. Schools that used the funds for shadow education often indicated that they were not fully content with the outcomes (e.g., they felt that external teachers were less involved than

expected, were unhappy with the organization or content of the activities, or did not see enough results), citing differences between expectations and the services that were actually provided. Many schools had stopped their collaborations with suppliers of shadow education at the time of the interviews, and had either stopped supplementary activities entirely or started organizing these activities themselves. At most of the schools at the time of the interviews, most supplementary education was organized internally.

Tutoring was offered at all schools, often by teachers, but sometimes by students as well. All schools prepared students for final high school exams within the regular curriculum. Some schools offered additional exam training during the last year or in the last weeks before the final exams. Some schools offered these trainings themselves, while others worked with external suppliers. These external suppliers sometimes made use of external locations, while others used the school buildings. Finally, homework support was present in most schools, whether more facilitative (e.g., offering students a space to study during and after school), more active (e.g., with active involvement of a teacher in helping the student plan or do their work), or both. Both facilitative and active homework support were offered by internal and external parties, usually within the school building.

In addition to these three forms, most schools offered several other forms of supplementary education. All schools offered support for educational needs. This was generally organized around the needs of the student in terms of content and scheduling. Most schools also offered a form of training or coaching, mostly aimed at the socio-emotional development of students. Examples include individualized programs as well as group training on test anxiety, resilience or social skills. In most schools, digital supplementary education such as interactive practice software or online materials such as YouTube videos were used, usually organized individually by teachers or students. Finally, forms of talent development were present at all schools, ranging from optional activities to a daily hour for either homework or an extracurricular activity. Common forms of talent development were extra language courses, honors programs and extracurricular sports.

7.4.2 Educational Professionals' Understanding of Publicness

Participants were asked about the supplementary education in and around their school, their opinions on these activities and how they perceived the influence of supplementary education on the publicness of education as defined by the Education Council (Onderwijsraad, 2021). In this section, we discuss the participants' viewpoints on the concepts established in the Education Council

Framework. Their views were obtained both directly (through explicit questioning) and indirectly (through discussions regarding the school, education in general and supplementary education in particular).

7.4.2.1 Democratic Goals

Most participants mentioned the importance of the school in the social development of students. These participants felt responsible for teaching students to work together, help and respect others, and solve disagreements in a civil way. Several schools were interested in connecting students to their local environment. Participants expressed wanting to connect students' hobbies and sports, family, and the local community to the school day as well. In addition, most participants stressed the importance of students' personal skills, such as taking responsibility and ownership, and learning to overcome obstacles.

7.4.2.2 Economic Goals

Participants stressed the importance of economic goals in terms of students obtaining good grades, passing each school year and passing their final exams. Additionally, some participants discussed the connection between secondary and tertiary education, and the need to prepare students for tertiary education. This preparation was discussed in the context of facilitating the transition, but also in the context of equipping students with essential skills, knowledge, and personal development to be able to succeed in tertiary education, and in the workplace later in life. Many participants stressed that the regular curriculum should be, and generally is, sufficient for students to pass their final exams and obtain their school diploma.

7.4.2.3 Relatability

Most participants were interested in giving students the opportunity to explore their interests at school. Several participants discussed making their educational programs more flexible to enhance student autonomy and enable students to align their studies with personal interests and needs. Some participants highlighted their supplementary activities as a way to appeal to parents and future students, and their efforts to make school more interesting for students, such as integrating new technologies into their education. In addition, some participants adapted students' schedules to ensure homework can be completed within school hours, allowing students to have sufficient time for hobbies, sports, and jobs after school.

7.4.2.4 Accessible Education

Accessibility of education was frequently mentioned by participants and often emphasized as very important. Most participants discussed equal access to educational opportunities for students, regardless of their background. Several participants wanted to ensure that students were able to obtain their diploma at their current or higher track, or stressed the importance of providing adequate support to students facing difficulties at home or to disabled students. Participants felt strongly about accessible education for students with specific needs. This feeling was particularly strong among participants of schools that are one of few offering specific educational tracks in a region.

7.4.2.5 Equality of Opportunity

The perception of equality of opportunity among participants largely overlapped with their ideas on accessible education. Several participants also mentioned that society undervalues practical, pre-vocational education tracks compared to theoretical, academic tracks. Some participants saw equality of opportunity as stimulating students to reach the highest possible track and supporting them in doing so. In addition, some participants discussed challenges to equality of opportunity, such as differences between students' socio-economic backgrounds, or challenges related to local issues impacting their student population.

7.4.2.6. Quality and Involvement of Educational Professionals

Quality and involvement of educational professionals were only discussed directly in relation to supplementary and shadow education.

7.4.3 The Impact of Supplementary Education on the Publicness of Education

Participants often made a distinction between internal supplementary and shadow education when they discussed the impact on aspects of publicness. Please note that the term *supplementary education* here addresses all supplementary education, *internal supplementary education* specifically addresses internally organized supplementary education and *shadow education* addresses externally supplied supplementary education, whether provided in school or at an external location.

7.4.3.1 Democratic Goals

Educational professionals rarely mentioned aspects of democratic goals in relation to supplementary education. Positive aspects that were mentioned were that supplementary education can serve as a bridge between students and

local organizations, offering opportunities for connection with the community through projects, or with other students by collaborating on projects or participating in, for example, theatre clubs. Students tutoring others was also seen as an opportunity for students to connect and contribute to the school community. On the other hand, some participants mentioned that shadow education might make education more individualized, as it allows students to pick and choose their education as opposed to having the shared social experience of attending school.

7.4.3.2 *Economic Goals*

Participants saw several positives in terms of economic goals: supplementary education, whether in- or external, may help students improve their results and pass their exams, and may prepare them better for tertiary education. Simultaneously, there were concerns. Some participants mentioned that the added value of shadow education was unclear. Many mentioned that the regular curriculum was sufficient on its own for students to pass exams. In addition, some participants mentioned that students attending (or planning on attending) shadow education showed reduced engagement or lower inclination to participate in regular classroom activities.

7.4.3.3 *Relatability*

In terms of relatability, participants only expressed positives. They found it very positive to be able to offer more, and more diverse, activities that fit students' needs and appeal to (prospective) students and parents. In addition, several participants mentioned liking the opportunity to adapt their educational programs to fit the modern context (e.g., integrating technologies into education) and students' schedules (e.g., freeing up time for homework at school). Participants generally saw supplementary education as a positive strategy to enable students to have a degree of autonomy in their education by tailoring their education to their needs, interests, and goals.

7.4.3.4 *Accessible Education*

Participants discussed accessibility in terms of ensuring support for students with support needs and keeping school accessible for these students. Most participants found that supplementary education generally had a positive impact on the accessibility of education *within their school*. They mentioned that it allowed them to meet students' needs, keep students with complex support needs in school, and offer tailored support trajectories. Supplementary education was sometimes used to allow some students to move up a track, or to bridge gaps caused by limited local facilities or limited support at home. The

positive aspects mostly concerned *internal* supplementary education. Some participants mentioned specifically that external suppliers were sometimes leveraged to provide specialized expertise that was not available internally. The negative aspects mentioned were solely concerned with shadow education. Almost all participants asserted that shadow education reduces educational accessibility due to financial barriers and expressed concerns that this could exacerbate pre-existing educational inequalities. Some participants were also critical of the support offered by shadow education, noting, in contrast to the support offered at school, that suppliers may employ a standardized format rather than provide the tailored, individual attention necessary to meet specific student needs.

7.4.3.5 *Equality of Opportunity*

Some aspects of supplementary education were thought to play a positive role in enhancing equality of opportunity. The ability to let students move up a track, to support students when parents are unable to, and to give students extra attention were named as positive aspects. Some participants mentioned that organizing supplementary education *internally* might prevent students from using shadow education. Additionally, internal supplementary education was frequently mentioned as a mechanism for promoting equality of opportunity by removing barriers to participation, by compensating for missed education (e.g., caused by school closures during the COVID-19 pandemic), or by addressing the lack of opportunities disadvantaged students face compared to their peers. The positive aspects mentioned by participants mostly concerned internal supplementary education, whereas the negative aspects mostly concerned shadow education. Almost all participants worried about differences in access to shadow education based on parental income, and thus about parental income impacting educational outcomes. Some participants specifically mentioned that it was mostly children of affluent parents that made use of shadow education, sometimes to compensate for students not being able to or not wanting to obtain a diploma at the parents' preferred track. Some participants named societal pressure on students to obtain a diploma at a higher track as a more general negative aspect.

7.4.3.6 *Quality*

Some participants mentioned that the increase in options when offering supplementary education increased the quality of the education provided, but participants mostly discussed quality in the context of a perceived negative impact of shadow education on educational quality. While several participants indicated that some suppliers of shadow education provide satisfactory educa-

tion, most participants generally had negative perceptions. Several participants mentioned the use of external teachers without teaching qualifications, or teachers unfamiliar with the specific context of the school, as posing challenges to the quality of shadow education, particularly in pre-vocational tracks. The lack of understanding of the school's student population, the school culture, student learning goals, and the absence of a pre-existing bond were mentioned as barriers for external teachers and student teachers. Some participants were also critical about the content of shadow education, explaining that there was too little accountability or regulation of the content, with some indicating that shadow education teachers did not actually teach their subject well, but rather taught to the test. Some participants also mentioned this as a reason for quality differences between regular and shadow education, as formal schooling follows a comprehensive curriculum with broad goals rather than focusing solely on exam scores. More generally, several participants mentioned that the quality of shadow education varied significantly, with differences emerging between suppliers. In addition, some mentioned that the quality of internal supplementary education sometimes varied between activities and teachers.

7.4.3.7 Involvement of Educational Professionals

Participants were mostly critical about the impact of supplementary education on involvement of educational professionals. Several participants explained that they had little to no insight into shadow education activities and mentioned lack of school oversight as a problematic aspect. Participants expressed a desire for increased collaboration and appreciation for communication when working with external suppliers. Some indicated this was a main concern in considering working with suppliers of shadow education.

Table 7.2 highlights the impact of internal supplementary education and shadow education on the aforementioned aspects of publicness as perceived by educational professionals.

Table 7.2 The perceived impact of internal supplementary education and shadow education on aspects of publicness

	Internal supplementary education	Shadow education
Democratic goals	+-	+-
Economic outcomes	+	+
Relatability	++	+
Accessible education	++	--
Equality of opportunity	++	--
Quality	+	-
Involvement of educational professionals	+-	--

Note. Pluses and minuses are used to indicate a positive or negative impact, with two pluses or minuses indicating a more uniform or strong positive or negative perceived influence. A plus-minus represents a neutral, negligible, or mixed result.

7.5 Conclusion

This chapter set out to answer to what extent supplementary education is reshaping aspects of the publicness of education as established by the Dutch Education Council (Onderwijsraad, 2021) from the perspective of educational professionals. We first briefly explored the place, role and scope of supplementary education in Dutch secondary education. Interviews were conducted after schools received funding to combat COVID-19-related learning delays. The interviews revealed that many schools used these funds to pay for shadow education (externally supplied supplementary education) but that these services were frequently discontinued, with schools often mentioning suppliers failing to deliver on expectations. In response, several schools started organizing supplementary education activities internally. Some schools even freed up space in the regular curriculum for structural supplementary educational activities. This study intentionally explored both shadow education and internal supplementary education. Previous work on supplementary education has mostly focused on shadow education (Park et al., 2016). Park et al. (2016) highlighted the necessity of studying supplementary education beyond just shadow education. The current study illustrates that internal supplementary education is heavily utilized in Dutch secondary schools. Furthermore, regular education, internal supplementary education and shadow education are intertwined in the Netherlands. Towards the end of the temporary COVID-19-related funding, all schools in the sample offered supplementary education,

sometimes in collaboration with external suppliers. In most cases, the supplementary education was organized internally.

Next, we addressed how educational professionals in Dutch secondary schools understand publicness. Our framework used seven criteria for publicness of education: democratic outcomes, economic outcomes, reliability, accessibility, equality of opportunity, quality and involvement of educational professionals. The first five criteria were discussed by participants in broad terms, while the latter two criteria were only discussed directly in relation to supplementary education.

We then moved to the question “To what extent is supplementary education reshaping publicness from the perspective of educational professionals?” Participants reported a positive impact of supplementary education on some of the criteria from the framework. One of these criteria was economic outcomes, such as student grades. While research has indicated that the results of shadow education on learning outcomes and student grades are mixed (e.g., Bray & Lykins, 2012; Jansen et al., 2023), the educational professionals in this study perceived the impact on grades to be positive, even when they were skeptical about the quality of shadow education. This may indicate that despite expressing critical views, their perspectives are relatively positive about the impact of shadow education on economic outcomes. The belief that shadow education is effective seems to exist for multiple stakeholders in education. The Dutch government, for instance, has proposed tutoring – both from qualified teachers and commercial suppliers – as a way to combat COVID-related learning delays. This belief also seems to exist in parents and students, with parents increasingly acting as consumers of shadow education. However, while shadow education is widely believed to be effective, empirical evidence regarding its impact on academic performance is limited. Another criterion where the educational professionals perceived a positive impact was reliability. In addition to shadow education mimicking formal schooling (e.g., Bray, 2022), internal supplementary education may also mimic shadow education as a way to attract and support students. Finally, educational professionals were relatively neutral about the impact of supplementary education on democratic outcomes, such as students working together and connecting students to their local community. Although the relationship between supplementary education and democratic values has not been comprehensively studied, it has been argued that the shift towards more educational competition, which is one potential motive for the use of supplementary education, has caused a move away from a focus on democratic values (Biesta & Säfström, 2023; Christensen & Zhang, 2021).

For the other four criteria, there was a distinction between perceptions of the impact of internal supplementary education and shadow education.

Regarding the involvement of educational professionals, participants felt that supplementary and specifically shadow education limited insight and say for educators over school activities. Other criteria were seen as infringed upon by shadow education but improved by internal supplementary education. Equality of opportunity is one of these criteria. Educational professionals criticized shadow education for undermining equality of opportunity, as it restricts access for less privileged students. This aligns with research indicating that privileged parents may use shadow education to better their children's educational position (Elffers & Jansen, 2019; Jansen et al., 2023). Simultaneously, it has been suggested that equality of educational opportunities for students may be improved through offering activities that are free of charge and thus accessible to all (Elffers et al., 2021). This line of argument was used by many participants, who indicated that while shadow education may hinder equality of opportunity, internal supplementary education may help by making these activities accessible to all. The same applies to accessibility: educational professionals felt internal supplementary education helped them to include and support students, while shadow education made education less accessible. Internal and external supplementary education were also perceived differently in terms of impact on quality. Participants were critical of shadow education, naming several reasons for its negative impact on educational quality. However, they also indicated that quality differed between teachers and activities for both internal and external supplementary education, which suggests that the effectiveness of education may depend on the specific context and individual instructors. This point is echoed in research, highlighting differences in the quality of shadow education as a reason why the effect on student outcomes is unclear. Moreover, it is argued that shadow education may hinder efforts to improve the quality of education (Bray & Lykins, 2012).

Thus, while supplementary education may enable schools to increase the publicness of education in some aspects, supplementary, and specifically shadow education, infringes on publicness in other aspects. This study has identified several aspects of the Education Council framework (Onderwijsraad, 2021) that are being reshaped by supplementary education and infringed on by shadow education, according to educational professionals. By combining a normative framework on publicness with empirical perspectives of educational professionals, this chapter has provided insights into the perceived impact on the publicness of education, while adding to the discussion on the concept of the publicness of education. Moreover, by using a Dutch framework to study the Dutch context, we were able to assess the impact of supplementary education according to educational professionals in a way that is relevant for both Dutch policy and practice.

In this chapter, we investigated the impact supplementary education has on the publicness of education, according to educational professionals. Both supplementary and shadow education are perceived to have an impact on the publicness of education in the Netherlands, but it differs per criterion of publicness whether that impact was perceived as positive or negative. Furthermore, all but one of the criteria of publicness considered in this chapter were perceived to be impacted by supplementary and shadow education. The impact on economic goals and relatability was generally perceived as positive, while the impact on involvement of educational professionals was perceived as mostly negative. For quality, accessible education and equality of opportunity, a negative impact was perceived for shadow education, while a positive impact was perceived for internal supplementary education.

7.6 Discussion

This chapter has identified a number of ambiguities in educational professionals' perspectives on how supplementary education may be reshaping publicness. The first is efficiency. Some research indicates that shadow education may raise educational effectiveness (e.g., Dang & Rogers, 2008). However, while many participants indicated that supplementary education could be useful for economic outcomes (e.g., grades, passing exams), participants were also skeptical about the added value of shadow education. Given these concerns, this could potentially make supplementary education quite inefficient and raises the question of whether we should invest time and effort into supplementary activities if the regular curriculum is sufficient. This line of reasoning has been used in research as well, relating potential inefficiency to the lack of consistent evidence for impact of shadow education on student outcomes (Bray & Lykins, 2012).

Another topic frequently mentioned by participants was that of equality of opportunity in education. Many participants felt that offering internal supplementary education positively impacted equality of opportunity. Whether making activities more accessible actually promotes equality or decreases inequality depends on the definition of equality of opportunity that is used. There are several ways to define equality of opportunity in education, each with implications for practice. In the Education Council framework (Onderwijsraad, 2021), equality of opportunity is not explicitly defined but focuses on the flourishing of students, regardless of their background. Internal supplementary education may increase equality in terms of equal access, but whether it increases overall equal opportunity remains to be seen.

Finally, there were contradictions within the topic of educational quality as well. While some participants valued internal supplementary education for increasing quality by broadening the program, several remarked on quality differences and points for improvement. Moreover, participants often found it hard to measure whether activities had the desired effect. It is therefore difficult to gauge whether supplementary education actually adds to the quality of the curriculum.

This chapter has given more insight into supplementary education inside schools as well as into the interplay between private and public aspects of supplementary education, and the positive and negative impacts on publicness. We have provided insight into the interaction between private and public in education, showing that private supplementary education does not only mirror public education, but public education may also mirror education by private suppliers through internal supplementary education. Different aspects of more public and private forms of supplementary education having positive and negative perceived consequences indicates the nuance in both. It explains the use of both approaches in schools, as well as the critical and positive – and at times contradictory – perspectives of educational professionals. In addition, the difficulty in separating supplementary and shadow education – both conceptually and in practice – highlights the entanglement between public and private and the necessity to move beyond this traditional dichotomy to accurately assess the current educational landscape. If the criteria as set out in the Education Council framework (2021) are considered to be important criteria of public education, and if the publicness of education in the Netherlands is to be protected, the current study has shown that supplementary and specifically shadow education can negatively affect formal education systems, particularly regarding quality, accessibility, equality of opportunity, and the involvement of educational professionals – from which it can be inferred that it is time to take action with regard to the role of shadow education in Dutch secondary schools.

Data were collected from schools that volunteered to participate. This has the potential risk of voluntary response bias, meaning that participants may have opinions on either side of a spectrum, but not in the middle. There are no clear indicators of this in the data. The use of group and individual interviews may have had positive and negative consequences. On the one hand, the group interviews facilitated rich discussion and yielded a more comprehensive understanding of the role of supplementary education within the school. However, group settings may cause participants to conform to the opinions of others. On the other hand, the individual interviews may have provided less complete information, but participants may have felt freer to speak their mind. Partici-

pants generally framed the subject of supplementary education in relation to equality of opportunity, even before being (explicitly) asked about equality of opportunity. The concept of equality of opportunity has been increasingly present in societal debates which may in part explain the heavy emphasis on equality of opportunity in the interviews.

Regarding the framework that was used for the analysis, it is important to consider that there are many perspectives on publicness, and that this framework represents just one understanding of publicness. Simultaneously, this framework is very relevant to this question, because it is embedded within the Dutch context and is directly linked to the setting of the question regarding supplementary education. Like many Western-European governments, the Dutch governmental context, including views on education, has been significantly shaped by neoliberalism. The neoliberal influence on education has been heavily criticized (e.g., Hogan & Thompson, 2021). The criteria in the Education Council framework (Onderwijsraad, 2021) need to be understood as choices, rather than a given. There are several ways to approach questions about publicness and education, and a neoliberal lens is not an inevitability. A framework created for a similar purpose by Waslander (2021) differs greatly from this and earlier Education Council frameworks (Onderwijsraad, 2001a, 2001b, 2021). While the criteria from Waslander's framework were used to inform the Education Council framework (Onderwijsraad, 2021), Waslander's criteria differ substantially from the Education Council's criteria. Waslander's framework does not include a focus on economic outcomes, freedom of choice, and personal benefits of students, but rather a focus on societal goals of the school and fairness. It may be advisable to reassess the usefulness of the criteria in the Education Council framework in assessing publicness, and, following Waslander (2021), to have an inclusive public deliberation to clarify which characteristics of public education we (the public) need to retain.

For future research on supplementary education, it is important to improve the conceptual clarity of this concept (e.g., specify dimensions that matter) in a way that gives researchers a more common language to address this topic, and that reflects the reality of this phenomenon in practice. In further research into supplementary education and the publicness of education, the extent of the negative impact of shadow education on quality, equality of opportunity, accessibility, and the involvement of educational professionals should be studied, with a focus on how to combat negative effects. Furthermore, the practical impact of supplementary education on equality of opportunity should be critically assessed. Additionally, the long-term practical impact of internal supplementary education on publicness of education needs to be evaluated further. Insights from these studies should be used to inform policy

on regulating supplementary education. Finally, it is important to explore the long-term impact of supplementary education on how schools are perceived, as educational professionals indicated that supplementary education may fundamentally alter societal perceptions of schools.

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8 Non-Permanent Teacher Contracts and Teacher Career Perceptions

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Abstract

The U.S. teaching profession is in a period of transition driven by shifts in the teacher labor market, evolving student enrollment patterns, and the growing influence of market-based policies in public education. Post-pandemic fluctuations in student enrollment – including increases in homeschooling and online learning – along with increased competition between traditional public schools, private schools, and alternative models of public schools have prompted school systems to seek greater staffing flexibility. One response to these pressures is the employment of classroom teachers on non-standard teaching contracts, including temporary, fixed-term, and non-tenured positions. This reflects broader trends toward deregulation and flexible employment arrangements inside and outside of the public sector. This chapter examines non-permanent contracting of teachers and investigates how contract type relates to teachers' experiences and career perceptions. Using data from the Teaching and Learning International Survey (TALIS) 2018, we analyze differences in job satisfaction, self-efficacy, and future career plans between teachers employed on traditional, permanent contracts, and temporary or fixed-term contracts. Our findings indicate that teachers on temporary contracts differ significantly from those in permanent positions in terms of demographic characteristics, professional experience, and perceptions of their work and career trajectories. These results highlight potential consequences of an expanding temporary teacher workforce, including implications for retention, professional stability, and instructional continuity. As schools continue to adopt more flexible staffing models, understanding the impacts of non-standard contracts is essential for anticipating future challenges for educators, school systems, and students.

In the United States, public schools are facing staffing challenges caused by an evolving teacher labor market. Localized shortages in teacher supply and a falling number of teacher candidates enrolled in teacher preparation programs are reshaping the teacher workforce (Edwards et al., 2024; Guthery & Bailes, 2022). Traditional public schools face competition for teachers from private schools and alternative public school programs like charter schools, which may have more flexibility because they often operate with fewer government regulations (Jabbar et al., 2019; Superfine & Woo, 2018). At the same time, the pandemic has reshaped education in other ways, some schools are experiencing lower or fluctuating student enrollment as parents choose alternative options for their children, including home and virtual schooling (Council et al., 2025). These trends are spurring school systems to seek a flexible workforce that allows them to respond to changing student enrollment trends and teacher staffing needs.

The introduction and incorporation of market logics from private industry into labor policy in public education has also contributed to the expansion of new contracting standards and approaches (Kingdon et al., 2013; Stacey et al., 2022). Practices like short-term staffing, external contracting, and the use of staffing agencies have been present in school systems for some time; however, until now they have more commonly been used in the employment of support personnel or other non-certificated roles. The use of alternative contracting, particularly in the form of short-term, non-permanent, and non-tenured contracts, for classroom teaching positions is expanding (Goldring & Sullivan, 1995). New standards and approaches have led to a decrease in the ubiquity of traditional, permanent, tenured teaching positions and contracts as the standard form of teacher employment (Goldhaber & Walch, 2016).

We understand variation in teacher contracting as a response to changing contexts in the teaching profession in the United States. In this chapter, we explore the relationship between contracting and teacher career plans and perceptions. We specifically examine non-standard contracts, such as temporary or fixed-term contracts, compared to traditional, permanent teaching positions. We study the relationship between contract types and teacher career perceptions, namely job satisfaction, self-efficacy, and future career plans. We find evidence that teachers employed on temporary contracts differ significantly from their peers on permanent contracts in terms of demographics, experience, and career perceptions. Alternative teacher contracting is part of an overall trend toward deregulation in the teaching profession and increased flexibility in work and employment arrangements for teachers, including alternative

certification or emergency licensing (Baker & Dickerson, 2006; Pollock, 2007; Strunk et al., 2022). The further expansion of temporary contracts for teachers could have implications for the workforce, schools, and students.

8.2 Literature Review

School systems may use alternative contract teachers as a response to increased uncertainty in staffing needs, an interest in increasing flexibility in the face of labor market pressures, including salary and benefits, changing demands from prospective teacher candidates for flexible work arrangements, or as a necessary stop-gap when faced with inadequate numbers of traditionally qualified employees (Duthilleul, 2005). In some national contexts, the prevalence of temporary or alternative contract teachers is an increasingly common part of standard school operations and teacher employment (Camphuijsen & Stolp, 2022; Muralidharan & Sundararaman, 2013; Stacey et al., 2022). In this section, we discuss the existing research on alternative contracting practices in the public sector outside of education, alternative contracting practices in education, and teacher staffing practices and the marketization of public education in the United States. Finally, we explore the existing evidence of a connection between employment practices and career perceptions and the possible implications for the present study.

8.2.1 *Alternative Contracting in the Public Sector*

The changing pressures of worker supply and demand have led to an increase in alternative contracts throughout the public sector (Conley, 2002; Jensen & Stonecash, 2005). Sudden changes within a sector – either in the supply of workers or the demand for certain skills or certifications – can lead to an increase in the incidence of alternative contracts (Petersen et al., 2022). These contracts may stipulate a temporary or fixed-term of employment in place of traditional indefinite or permanent employment (Kalleberg, 2003). Such practices can give companies the ability to respond to targeted or short-term employment needs, whether a need for temporary increases in staff, specialized worker skills, or project specific demands (Acheampong, 2021; Conley, 2002). Alternative contracting may increase employer flexibility in responding to these labor market changes through the provision of particular needed skills or personnel for temporary employment in a way that traditional long-term tenured public sector employment cannot (Jensen & Stonecash, 2005; Purcell & Purcell, 1998). These arrangements have been touted for decades by proponents as a way to increase

competition and thereby improve performance in an otherwise stagnant or flagging workforce (Jensen & Stonecash, 2005; Purcell & Purcell, 1998).

However, researchers have called attention to the potentially negative impact these employment arrangements have on workers. Alternative contracts, particularly in the traditionally stable public sector, may increase in job insecurity and turnover rates – even for permanent employees (Conley, 2002). These patterns may lead to a less stable public sector workforce as insecurity reduces the attractiveness of public sector employment and drives out highly qualified workers (Conley, 2002). Increased turnover can also lead to a reduced workplace-person fit that and may be particularly detrimental in specialized areas (Kalleberg, 2003; Petersen et al., 2022).

Employers within the public sector may still turn to alternative contracting as a cost-cutting effort (Purcell & Purcell, 1998). Regardless of base salary, employees on temporary contracts can cost less to the employer by forgoing other costs associated with the employment of full-time, permanent workers. These may come in the form of health care coverage (Kalleberg, 2000), retirement benefits, or other financial output associated with worker unionization (Stecy-Hildebrandt et al., 2019).

Researchers note that contracting on a temporary or fixed-term basis is associated with key worker characteristics (Latner & Saks, 2022). In their recent review of studies in the European context across the past decades, Latner and Saks (2022) found that the impact of temporary work varied by characteristics such as age and gender – indicating that temporary contracting could be a positive move for some groups, but a negative move for others. In particular, the research suggests that men may be more likely to transition from temporary to permanent work, while women employed on these contracts may be “trapped” in the temporary workforce.

8.2.2 Alternative Contracting in Education

Short-term contracting for teachers is a part of the broader trend of marketization and the introduction of private sector logics into public education. There is an ongoing debate about the appropriateness of these strategies for public education (Baker & Dickerson, 2006; Chubb & Moe, 2011; Henig, 1995). A recent study by Camphuijsen and Stolp (2022) conducted in the Netherlands found that temporary contracting by private agencies external to the school for public school teachers was on the rise. This cohort of teachers differed from their traditionally employed peers in key ways. Temporary contract teachers tended to be male, younger, and from a migrant background (Camphuijsen & Stolp, 2022). While much of the research on the topic has occurred in non-U.S. mar-

kets and outside of the education sector (Conley, 2002; Latner & Saks, 2022), there is some recent evidence that schools facing fluctuations in student enrollments mid-year and across years, or uncertain needs for specialized course instruction may choose to employ temporary or fixed-term teachers (Clem, 2023; Lieberman, 2022).

Proponents of market-based staffing logics hold that the best way to encourage a consistent and robust supply of highly effective teachers is to free public schools from highly regulated public bureaucracies. Some scholars suggest that market logics in teacher staffing would result in a professional teaching core empowered to lead efforts of school improvement (Hoxby, 2000). These teachers would be more likely to innovate, diversify the curriculum, and offer varied instructional strategies in a more professional, less bureaucratic school organization (Chubb & Moe, 2011). These claims are important in light of research that consistently identifies teachers as the most significant factor to influence student achievement and success (Blazar & Kraft, 2017; Nye et al., 2004; Oppen, 2019). Highly effective teachers are vitally important to school quality and student daily experience (Hughes, 2012).

In contrast, other scholars suggest that increased market reforms may lead to greater instability and produce higher rates of teacher turnover – leading to a loss of institutional knowledge and reducing school effectiveness (Jabbar, 2018). In this case, an attempt to reduce shortages and close employment gaps through flexible contracting could exacerbate these issues even more. Traditionally, a central draw of public sector employment, particularly in the case of teachers, is job security and stability – such as teacher tenure practices – but new contract schemes could reduce or eliminate this (Camphuijsen & Stolp, 2022; McGrath-Champ et al., 2023). Recent research on temporary contracts in the education sector has shown that instead of improving outcomes, they result in an increase in worker insecurity across both temporary and traditionally employed workers (Marent et al., 2020; McGrath-Champ et al., 2023).

8.2.3 Teacher staffing challenges and labor markets in the U.S.

Either way, in the United States, teacher contracting norms are evolving. Traditionally, public school teacher contracts are permanent contracts that can lead to protected employment via tenure after an initial probationary period for novice teachers (Goldhaber & Walch, 2016). Depending on jurisdiction, parts or all of this contract may be negotiated and governed by a teacher's union on behalf of teachers (Strunk & Grissom, 2010). However, new workforce expectations (Carver-Thomas et al., 2022; Jordan & DiMarco, 2022; Mitchell, 2022), the changing labor demands of younger generations (Barhate & Dirani, 2021;

HR Path, 2022; Ng et al., 2010), and shifts in the school choice and competitive landscapes for teachers (Horsford, 2019; Richmond, 2022) are changing the standard for teacher contracts. Schools, school districts, and state education leaders are adapting policies and practices toward deregulation in favor of increased flexibility. These changes are impacting teachers and schools and make this a pressing area for inquiry. Recent news reports show that school systems in the United States may be turning to alternative contracts to fill gaps for specialized, hard-to-staff teaching positions, or to create a more flexible and responsive workforce (Lieberman, 2022; Shanahan, 2024).

While overall teacher shortages in the United States are difficult to quantify due to reporting discrepancies among school districts and states (Edwards et al., 2024; Nguyen, 2024), staffing challenges in school have been documented across the country for decades (Garcia & Weiss, 2019b; Malatras et al., 2017). In one ongoing project to better document shortages on the national level, a team of researchers has aggregated state level data to estimate a yearly count of more than 50,000 teacher vacancies nationwide, with another 200,000 or more posts occupied by underqualified candidates (Nguyen et al., 2024). The National Center of Education Statistics (NCES) reported as part of their 2024 School Pulse Panel, that 82% of districts in the United States had two or more teacher vacancies going into the 2024-25 school year, while 64% shared that they faced staffing difficulties due to a shortage of qualified teacher applicants (School Pulse Panel 2024-25, 2024). While patterns vary by locality, these challenges manifest particularly in hard-to-staff subjects and areas of need, such as in special education classrooms (Peyton et al., 2021), advanced math and science courses (Sutcher et al., 2019), and schools in high poverty areas (Garcia & Weiss, 2019a). Schools with fluctuating enrollment needs, such as rural or urban school settings, also may face increased challenges in maintaining a stable and teaching workforce (Goldhaber et al., 2020; Jacob, 2007). States and districts spend significant time and resources seeking to fill gaps in teacher staffing through recruitment and retention efforts and policy changes at the state and district levels (Espinoza et al., 2018; Goldring & Cox, 2026).

8.2.3.1 Teacher Tenure and Permanent Long-Term Contracts

In an effort to improve teacher retention and reduce turnover, many states have longstanding laws that grant employment protection to teachers in the form of tenure (Thiel, 1939). Tenure rules offer teachers protection in the form of a “permanent” contract after a set probationary period at the start of their career – most often two or three years (Kahlenberg, 2016). Across the U.S., tenure laws for teachers vary across states. During this probationary period, teachers may be employed on a temporary one year contract and have the expectation of achiev-

ing tenure after fulfilling certain requirements during the set number of years (Kahlenberg, 2015). However, like other teacher labor market regulations, these are set at the state level, and while tenure laws have typically granted teachers protection based on years of employment, some states now also incorporate performance measures, such as evaluation scores, into their tenure-granting processes (Thomsen, 2014). In recent years, many states have moved to weaken rules to allow more leeway for both terminating contracted teachers and for the use of temporary contracts in the hiring new teachers. Additionally, most states do not allow the transfer of tenure from another state, and some do not transfer tenure across districts within a state. Several states no longer offer any tenure for newly hired teachers (National Education Association, 2023).

8.2.3.2 *Charter Schools*

Teacher labor markets are further complicated by the presence of charter schools. In the United States, charter schools are public schools that receive a special license to operate from either a state or district governing body; their funding is part of the public school system and parents do not pay tuition. Since the first charter school laws were passed in the early 1990s, they have expanded and now enroll about 7% of public school students nationwide – and considerably higher percentages in some states and cities (National Center for Education Statistics, 2022). Almost all states now have laws permitting charter schools under at least some circumstances; these schools operate under different rules than traditional public schools (TPS) and are, at least in principle, freed from restrictions to innovate and adapt. These schools are often permitted to make contracting, hiring, and staffing decisions outside of the regulations that govern TPS (Wilkins, 2020). Importantly, charter school teachers typically do not have access to the same tenure, permanent contracting agreements as TPS teachers. As a result, charter school teachers tend to have higher rates of turnover than their peers in traditional schools and are less likely to be part of a union or grouped under collective bargaining agreements (Barrett et al., 2022). Charter schools are more likely to employ teachers on temporary contracts.

8.2.3.3 *Private Schools*

A complex system of private education exists separate from the public education system in the United States. Private schools are independent schools and include a broad spectrum of school types and levels and encompass both religious and non-religious institutions. These schools can vary widely in structure and organization and are not supported by public funds. Parents pay tuition for private schools. As of 2021, approximately 9% of students attended private education (National Center for Education Statistics, 2024). Private schools are

not subject to the same oversight or regulations as public schools (either TPS or charters); this includes teacher qualifications. While many private school teachers have advanced degrees and state licensure, these standards, along with regulations such as tenure, contract duration, and other contract terms, even licensure, are set by the individual school itself and not by a state or district board of education (National Center for Education Statistics, 2023). Private schools are also free from many state and federal accountability policies.

8.2.4 *Contract Types and Career Perceptions*

There is limited research on the relationships between contract type (permanent or alternative contracts) and career perceptions, particularly how contract type relates to teacher job satisfaction, sense of efficacy, and future career planning (Hughes, 2012; Perrachione et al., 2008; Skaalvik & Skaalvik, 2017). Teacher self-efficacy and job satisfaction are related to teacher retention (Perrachione et al., 2008; Skaalvik & Skaalvik, 2017) and contribute to overall workplace effectiveness (Bandura, 1997; Knox & Anfara Jr., 2013; Shahzad & Naureen, 2017). If the use of alternative contracts reduces self-efficacy and job satisfaction among the teacher workforce, this could have consequences for teacher turnover. Prior research suggests strong relationships between teacher job satisfaction and teacher turnover (Madigan & Kim, 2021; Perrachione et al., 2008). In their meta-analysis of research on the relationship between job satisfaction and intention to quit, Madigan and Kim (2021) found that job satisfaction was significantly negatively associated with teachers' intention to quit, meaning satisfied teachers are more likely to plan to stay in their position. Despite wide variation across studies, their analysis found no evidence that demographic, contextual, or other factors acted to moderate the relationship between teacher job satisfaction and intention to remain in their role.

8.3 Research Questions

The chapter first examines the prevalence of alternative, non-permanent, temporary, and short-term teacher contracts, and then explores the relationship of teacher contract type to teacher job satisfaction, self-efficacy for high quality teaching, and future career plans. In this chapter, we specifically ask:

1. What is the distribution of teacher contract types (both permanent and alternatives (i.e., temporary contracts) in U.S. schools?

2. What is the relationship between teacher contract types and teacher, school, and community characteristics?
3. What is the relationship between teacher contract type and teacher self-efficacy for high quality teaching, job satisfaction, and career plans?

To fully explore these questions and examine teacher contracting patterns, we analyzed data from the Teaching and Learning International Survey (TALIS) 2018 from U.S. teachers, with supporting data drawn from the Common Core of Data (CCD) from the U.S. National Center for Education Statistics (NCES). From the TALIS survey, described in more depth later in this chapter, we study nationally representative data on teachers in the United States.

8.4 Methodology

Our framework, shown in Figure 8.1, outlines our approach to studying the relationships among contract types, and teacher and school-level characteristics, teacher self-efficacy, job satisfaction and career plans. We examine three contract types: temporary one-year contracts, temporary extended contracts, and traditional, permanent teacher contracts¹. We analyze the relationship between teacher contract type (temporary one year, temporary extended, or permanent) and teacher self-efficacy, job satisfaction, and career plans.

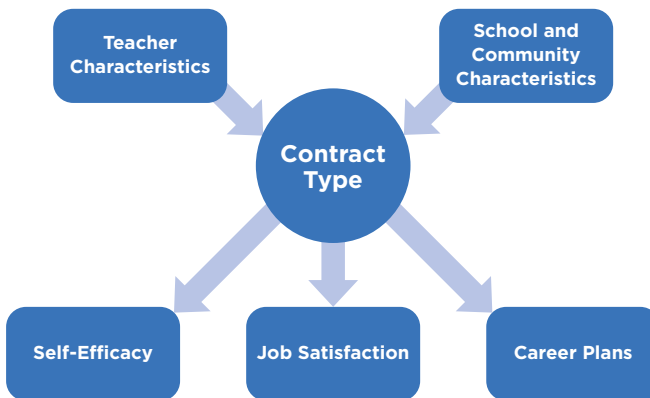


Figure 8.1 Conceptual Framework

¹ These contract types reflect the categories as identified in the TALIS (2018) Survey.

Drawing on data from the Teaching and Learning International Survey (TALIS) 2018 teacher questionnaire in the United States (OECD, 2019), this chapter investigates the relationship between teacher contract type, comparing permanent regular contracts and non-permanent, shorter-term contracts and teacher's career perceptions as indicated by their self-efficacy, job satisfaction, and future career plans. The data are particularly suited for this study because it is nationally representative of U.S. teachers and collects data directly from teachers about their plans for the teaching profession and experience in the classroom working with students. We explore the characteristics (such as gender, years of experience) of teachers on temporary term contracts, the characteristics of schools and communities that use these contract types, and the relationship between teacher contract type and teacher self-efficacy, job satisfaction, and career plans.

The TALIS 2018 is the third data collection cycle of the Teaching and Learning International Survey, which is coordinated by the Organization for Economic Cooperation and Development (OECD). The survey consists of teacher and principal surveys from an international cohort of teachers and principals in 49 participating educational systems. In the United States, the survey is conducted by the National Center for Education Statistics within the U.S. Department of Education (TALIS 2018 U.S. Web Report (NCES 2019-132 and NCES 2020-069), 2020). The teachers and leaders surveyed work with secondary students in the 7th – 9th grades. These teachers are sampled from both U.S. middle schools (6, 7th, and 8th grade campuses) and high schools (9th – 12th grade campuses). We use data from the United States administration of TALIS. The U.S. data contain survey information from 2,560² teachers from 164 schools nationwide. Eligible schools were sampled from two sampling frames; public schools, including both traditional public schools (TPS) and charter schools, were sampled from the Common Core of Data and private schools from the Private School Universe Survey (PSS).

This paper relies on data from both the TALIS datasets and datasets from the 2018 NCES Common Core of Data. From the TALIS teacher dataset, we use measures related to teacher career perceptions and individual teacher-level characteristics. The TALIS principal dataset provides further school-level and community level measures. We use two datasets from the 2018 NCES Common Core of Data (CCD), the school level directory and CCD school characteristics

2 All unweighted sample sizes reported to the nearest 10.

files, for more nuanced information about public school type – traditional public school (TPS) or charter. Our final analytic sample contains 2,290 teachers from 150 public schools (including both TPS and charter schools) and 270 teachers from 20 private schools in the United States.

8.4.1.1 Measures³

To study patterns associated with teacher contracting, we develop a series of TALIS 2018 measures from both the teacher and principal surveys to explore teacher job satisfaction, self-efficacy, and career plans as well as key individual teacher and school characteristics and teacher contract type.

Teacher Contract type. The TALIS 2018 teacher survey asks teachers to identify their contract type in one of three categories; (1) permanent employment (an ongoing contract with no fixed end-point before the age of retirement); and two categories of alternative contracting: (2) temporary contract for a period of more than 1 school year; and (3) a temporary contract for a period of 1 school year or less. We use this variable both in its categorical form with three groups the traditional “permanent,” and alternative contracts, “temporary extended” and “temporary one year” and as a dichotomous, grouping the two alternative contracts into one category, “temporary contract.”

8.4.1.2 School and Community Characteristics Measures

School type. This variable differentiates between a teacher’s employment at a private school or public school (which includes both TPS and charter schools). The TALIS 2018 principal survey includes a question identifying the school as a public or private school. This survey asks, “Is this school publicly or privately managed?” and offers the options “Publicly managed: This is a school managed by a public education authority, government agency, or governing board appointed by government or elected by public franchise.” or “Privately managed: This is a school managed by a non-government organization (e.g., a religious institution, trade union, business or other private institution).”

Charter Status. This variable is an indicator of whether the school is a traditional public school (TPS) or a public charter school. The measure for school type was drawn from a charter indicator variable in the 2018 NCES CCD Directory file. The 150 public schools in the sample are further distinguished as either a charter school or a TPS by this indicator.

School size. School size is measured by total student enrollment as reported by principals on the principal survey.

3 For all measures we use teacher level survey weights provided by the TALIS data set in all calculations and apply Balanced Repeated Replication (BRR) weights for variance estimates.

School locale-community type. Community type is a measure of urbanicity, and community size reported by principals on the principal survey. The question reads, “Which best describes the community in which your school is located?” with the options, “A village, hamlet, or rural area (up to 3,000 people),” “Small town (3,001 to 15,000 people),” “Town (15,001 to 100,000 people),” “City (100,001 to 1,000,000 people),” “Large city (more than 1,000,000 people).” Almost 40% of the sample identified “Town (15,001 to 100,000 people)” as their community type, we use this as our unit of comparison for analyses.

8.4.1.3 Teacher Measures

Demographic characteristics. Teachers report personal demographic information as part of the teacher survey. Teachers report information identifying gender (male or female), age group, and years of experience. Teacher age group is reported as a continuous measure in the restricted use add on file and as a categorical measure in the public data set with the following levels: Under 25, 25-29, 30-39, 40-49, 50-59, 60 and above. We use both the categorical measure – in our descriptive data – and the continuous measure in our regression analysis.

Teacher self-efficacy for high quality teaching. The scale measure for teacher self-efficacy (Cronbach’s $\alpha = 0.911$) is constructed from a series of 12 related items on a four-point Likert scale (ranging from “not at all” to “a lot”), such as “In your teaching, to what extent can you do the following? (1) help students think critically (2) provide an alternative explanation (e.g., when students are confused)” (see Appendix Table 1 for the full range of self-efficacy questions).

Job Satisfaction. The measure for job satisfaction is a composite scale score drawn from two sub-scales on satisfaction, teacher satisfaction with their school, and satisfaction with the teaching profession as a whole. Teachers answered on a four-point Likert scale (ranging from “strongly agree” to “strongly disagree”) questions such as, “I would like to change to another school if possible” and “I think that the teaching profession is valued in society” (see Appendix Table 2 for the full range of job satisfaction questions).

Career Plans. The measure of teacher career plans is from write-in answers to the question “For how many more years do you want to continue to work as a teacher? Please write in a number.”

8.5 Methods

To address the first research question, we explore the distribution of teacher contract types in the United States using descriptive statistics.

For RQ1 only, we include the distribution for both private school teachers and for traditional public and charter school teachers. This sample provides a more complete view of the distribution of teacher contract variation across the education sector in the U.S. and allows for comparison between school types and sectors.

In our analysis for research question two, exploring the relationship between teacher contract types and teacher characteristics, and between teacher contract types and school and community characteristics, we limit our sample to teachers from schools identified as publicly managed, including both traditional public schools (TPS) and charter schools. By doing so, we isolate the relationship between teacher contract type and our variables of interest within the context of publicly funded education (public schools) given the shift toward deregulation and flexibility in the public teacher labor market. In this analysis, we analyze the differences between the traditional versus alternative contract teacher workforce within the public school context, where this variation is most meaningful given the norm of permanent long-term contracts. Private school teachers do not have a norm of tenure or permanent contracts.

We merge the school level data, including school type and community characteristics, with the teacher-level survey data. We then subset the dataset to only include teachers from public schools. This allows us to focus our remaining analyses on public education to better address our research focus of contracting patterns in publicly funded employment. Using data from the cohort of public school teachers, we first examine the distribution of contract types among teachers of different gender, age groups, and experience levels. We then use a linear probability model to predict teacher contract as a dichotomous variable of either permanent or temporary contract type. “Temporary contract” includes teachers employed on both one-year fixed-term and longer than one-year fixed-term contracts. Equation (1) shows the model.

$$ContractType_i = \beta_0 + \beta_1 ChSch_s + \beta_2 SchSize_s + \beta_3 ComType_s + (\chi_i)\beta + \epsilon_i \quad (1)$$

In this equation, we include school-level characteristics, including, an indicator of charter status, $\beta_1 ChSch_s$ school size, $\beta_2 SchSize_s$ community size, $\beta_3 ComType_s$. We also include a vector χ_i of teacher-level characteristics that includes age, teacher gender, and years of experience.

For our third research question, studying the relationship between teacher contract type and teacher self-efficacy, job satisfaction, and career plans, we examine teacher career trajectories – including teacher plans to leave the profession and teacher experience among different contract types. We use OLS regression to estimate the relationship between contract type and teacher self-efficacy, job satisfaction, and career plans. We predict these outcomes using contract type while controlling for first teacher characteristics, then school and community characteristics, finally both.

$$SelfEfficacy_i = \beta_0 + \beta_1 ContractType_i + (\chi_i)\beta + (V_s\beta) + \epsilon_i \quad (2)$$

Equation (2) shows the generic model with the first outcome of interest $SelfEfficacy_i$ dependent on the categorical variable for $\beta_1 ContractType_i$. The model includes vectors for both χ_i individual and school-level V_s characteristics. Individual teacher characteristics χ_i include teacher age, experience, and gender. School-level characteristics V_s include school size, status as a charter school, and community type. In this analysis, we use the disaggregated categorical measure of teacher contract type, teachers may be identified as “permanent,” “temporary extended,” or “temporary one year.” This allows for a more nuanced understanding of the impact of contract type on key outcomes. We use self-efficacy, job satisfaction, and career plans as important measures for teacher career perceptions, based on existing research that demonstrates these are connected to teacher effectiveness and student outcomes.

We then explore a further specified model that interacts contract type with key teacher characteristics to determine differential relationships of contract type on individuals of different ages and experience levels. Shown in equation (3), we interact teacher age, Age_i , and teacher experience, Exp_i , with contract type, $ContractType_i$. In addition to gaining a more nuanced understanding of the relationship between contract type and self-efficacy, job satisfaction, and career plans, the inclusion of interaction terms reflects the reality that teachers from different career or life stages may be impacted differently by undertaking temporary contract employment.

$$SelfEfficacy_i = \beta_0 + \beta_1 ContractType_i + \beta_2 Age_i + \beta_3 Exp_i + \beta_4 ContractType_i \times Age_i + \beta_5 ContractType_i \times Exp_i + (V_s\beta) + \epsilon_i \quad (3)$$

8.6 Results

8.6.1 Research Question 1: What is the distribution of teacher contracts in the U.S.?

Our initial analysis focuses on the overall distribution of teacher contract types throughout the nationally representative sample of surveyed teachers. According to this sample, 38% of all teachers in the United States, in both public (traditional and charter) and private schools, are employed on temporary rather than permanent contracts. This includes both “temporary extended” contracts, which include any non-permanent contract with a duration for more than one school year and “temporary one-year” contracts (distribution shown in Figure 8.2). About 12% of teachers are employed on temporary extended contracts and 26% are employed on temporary one-year contracts.

We initially hypothesized that private school teachers would be more likely to be employed on temporary extended contracts and not more likely to be employed on a temporary one-year contracts than public school teachers. Due to the absence of teachers’ union negotiating power and state legislative oversight, and because of the independent nature of private schools, we anticipated that the private schools would contain fewer teachers with permanent contracts. Private school teachers are significantly more likely to be employed on temporary one-year contracts than their public school counterparts, but not more likely to be employed on a temporary extended contract. In sum, nationally, regardless of sector, most teachers in public and private schools are employed on a permanent teaching contract. The most prevalent variation away from this norm is a temporary teacher contract of one year in duration.

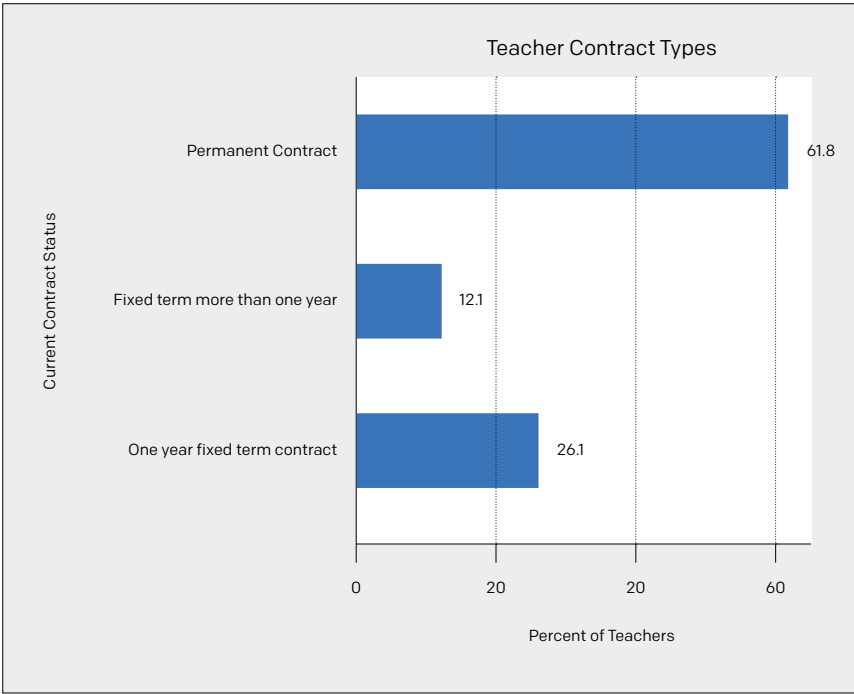


Figure 8.2 Contract Types in Schools in the United States
SOURCE: Organization for Economic Cooperation and Development (OECD), Teaching and Learning International Survey (TALIS), 2018.

When we narrow our analysis to teachers in the public sector, we find a smaller proportion – about 36% of teachers – are employed on temporary contracts (extended or one-year contracts), shown in Figure 8.3. Specifically, 13% of public school teachers reported temporary extended contracts and 23% reported temporary one-year contracts. We also find further variation in contracting differs within the public sector between traditional public schools and charter schools. In charter schools, more than half of teachers (59%) are employed on a temporary contract, 38% on a temporary one-year contract, and 20% on a temporary extended contract – significantly more than either TPS or private schools. Traditional public schools (TPS) employ only 35% of their teacher workforce on a temporary contract, 22% on a one-year contract and 13% on a temporary extended contract – a much larger proportion, 65% of their teacher workforce was employed on permanent contracts. This finding is supported by previous research and discourse as charter schools in the United States are commonly associated with contract variation and a departure from traditional employment schemes.

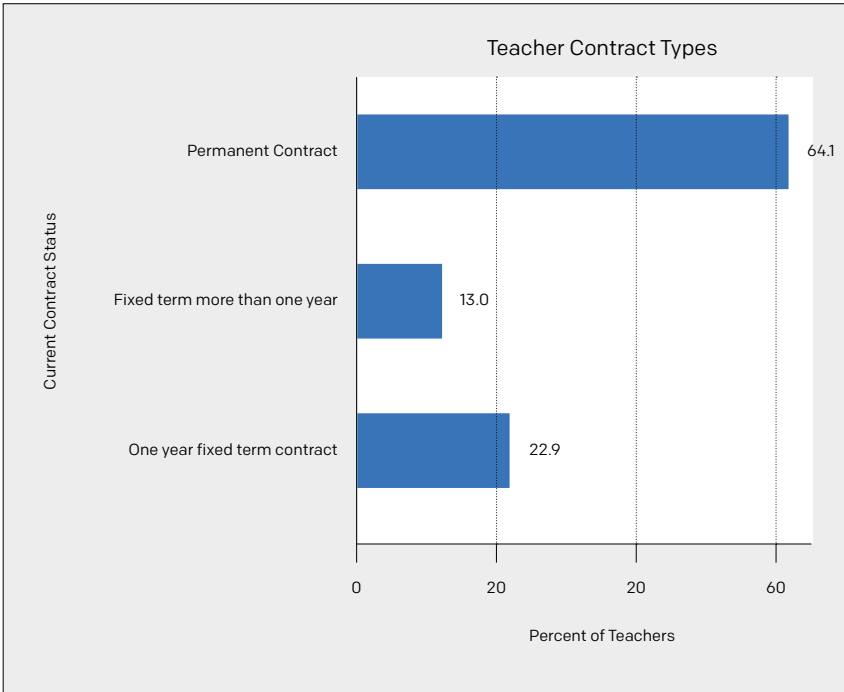


Figure 8.3 Contract Types in Public Schools in the United States

SOURCE: Organization for Economic Cooperation and Development (OECD), Teaching and Learning International Survey (TALIS), 2018.

8.6.2 Research Question 2: What is the relationship between teacher contract types and teacher, school, and community characteristics?

We would expect that teachers with more years of experience would be more likely to hold permanent contracts, especially considering state teacher tenure laws. As discussed earlier in this chapter, the most common state requirement for holding tenure and receiving a permanent teacher contract is three years of successful classroom teaching in a public school. However, these requirements vary by state and may be accompanied by additional stipulations, such as evaluation scores. Additionally, most states do not allow the transfer of tenure from another state, and some do not transfer tenure across districts within state, and several states have eliminated the practice of teacher tenure. Because of these circumstances, there may still be significant variation in contract type among experienced teachers. Thus, we hypothesize, that novice teachers in TPS settings, those with fewer than three years of experience, would be more likely to be on temporary contracts as part of their progression toward tenure. These

teachers would then have the expectation of moving to a permanent contract in later years pending fulfillment of tenure requirements.

The data indicate that teacher contract type in the public school sector, across both public school types, charter and traditional public schools (TPS), varies by the distribution of teaching experience. Teachers on temporary contracts, both one year or extended, are more likely to be novice (3 years of experience or less) or early career (5 years of experience or less) than teachers on permanent contracts, as shown in Figure 8.4. The distribution of teachers on a temporary contract is more heavily weighted toward less than 10 years of teaching experience than permanent teachers.

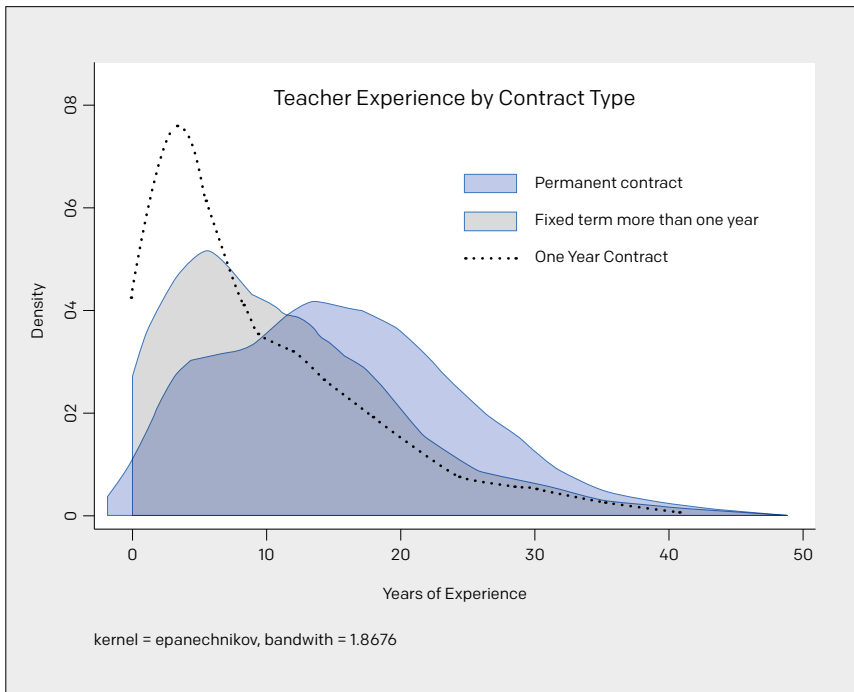


Figure 8.4 Distribution of Teacher Experience Level by Contract Type

SOURCE: Organization for Economic Cooperation and Development (OECD), Teaching and Learning International Survey (TALIS), 2018.

We found that while experience is partially correlated with teacher's age, teachers on temporary contracts are also, on average, younger than their counterparts employed on permanent teacher contracts, as seen in Figure 8.5. As shown in Table 8.1, permanent contract teachers are less likely to be under 40 (36%) than those on one-year contracts (57%) or longer temporary contracts (52%). Teachers aged sixty or above are significantly more likely to be employed on a permanent teaching contract than a temporary contract of any length.

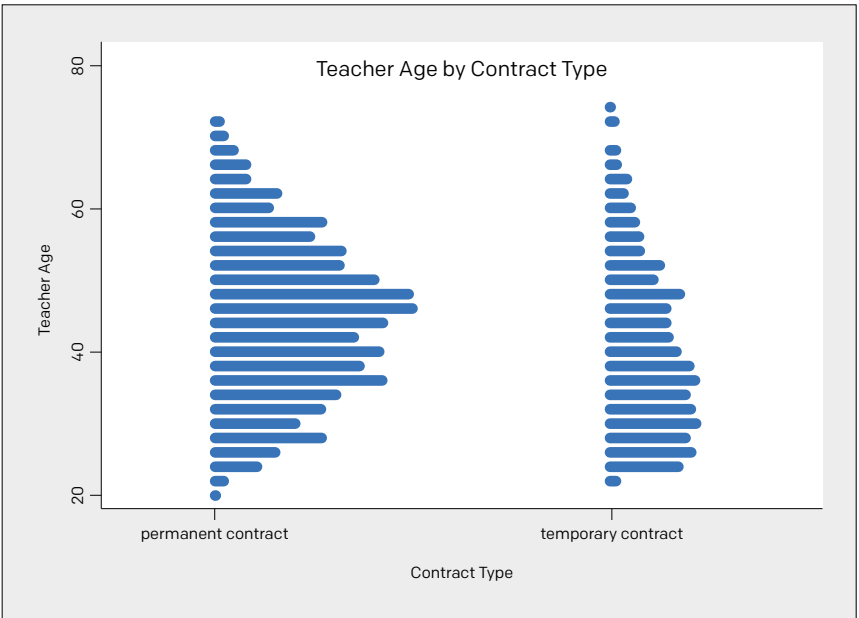


Figure 8.5 Teacher Age by Contract Type
 SOURCE: Organization for Economic Cooperation and Development (OECD), Teaching and Learning International Survey (TALIS), 2018.

Table 8.1 Teacher Age Groups by Contract Type

Contract Type	Teacher Age Groups					
	Under 25	25-29	30-39	40-49	50-59	60 and above
Permanent contract	2.1%	8.2%	25.4%	34.7%	22.1%	7.6%
Temporary extended	5.2%	15.6%	31.5%	26.7%	13.7%	7.4%
Temporary one year	6.6%	17.0%	32.9%	23.1%	15.8%	4.7%
Total	3.5%	11.0%	27.8%	31.2%	19.8%	6.9%

SOURCE: Organization for Economic Cooperation and Development (OECD), Teaching and Learning International Survey (TALIS), 2018.

Next, we analyze the extent to which there is a relationship between contract type and teacher, community, and school characteristics, including the type of public school – traditional public school (TPS) or charter school (see Table 8.2). The data suggest that age, gender, community size, and employment at a charter school are associated with the likelihood of a teacher working on a temporary contract (one year or less, or more than one year). When considering teacher characteristics related to employment on a temporary contract, age and gender are significant predictors of contract type⁴. Teacher age is significantly and negatively associated with employment on a temporary contract, indicating that younger teachers are more likely to be employed on temporary contracts. This may indicate that temporary contracting provides flexibility of employment that is more attractive to younger workers or that younger teachers are simply involuntarily employed on temporary contracts because permanent contracts are not offered to them. Similarly, older teachers are deterred by the lack of stability associated with employment on a temporary contract. In the U.S. context, it is important to note that younger teachers are also more likely to have entered the teaching workforce after the removal or adjustment of state tenure regulations that make it more challenging for newer teachers to achieve tenure (National Education Association, 2023; Strunk et al., 2022). This is also consistent with younger teachers that have not yet progressed to tenure or involuntarily work on temporary contracts because there are no longer-term contractual arrangements available to them, thus pushing young teachers into precarious employment situations.

We also find that male identifying teachers are less likely to be employed on a temporary contract. This is in contrast to recent studies in other national contexts that found male teachers more likely to be employed on temporary and alternative contracts (Camphuijsen & Stolp, 2022). However, research in other sectors has shown that male workers employed on temporary contracts are more likely to transition into permanent employment – indicating they may be less likely to remain “stuck” in a temporary or short-term contract if undesired (Latner & Saks, 2022).

The largest portion of teachers in our sample, about 40%, work in mid-size “towns” with populations between 15,001 and 100,000 people. When compared to this group, teachers in smaller communities, including both rural areas and towns smaller than 15,000 people, are more likely to hold temporary employ-

4 Experience is only significant in model 2, which includes only teacher characteristics. In this model, more experienced teachers are less likely to be employed on a temporary contract, but in models that included school or community characteristics, experience is no longer a significant indicator of contract type. This may indicate that any variation found in model 2 was more accurately attributed to differences in the type of school.

ment contracts. Teachers working in large cities (population over 1,000,000) are less likely to work on a temporary contract compared to mid-size towns. There is not a significant difference between towns with populations between 15,001 and 100,000 and cities with populations between 100,001 and 1,000,000. As presented in Table 8.2 (Model 4, the full model), compared to large cities, all other communities are more likely to employ teachers on a temporary contract. The higher likelihood of smaller communities to employ teachers on temporary contracts holds even when controlling for teacher gender, age, or experience. This may reflect an increased need in smaller communities to employ teachers on temporary contracts to adjust to fluctuation in employment or it may reflect a response to labor market uncertainties faced by these smaller communities.

The higher likelihood of teachers holding temporary contracts in small communities and rural areas may reflect the difficulties associated with staffing in these labor markets. Teacher labor markets are local, and teachers tend to work closer to where they obtained their university training, and smaller communities may have a smaller pool of prospective teachers for longer-term contracts, leading them to rely more on temporary contracts (Goldhaber et al., 2020; Ingersoll & Tran, 2023). Additionally, rural communities are more likely to experience fluctuating student enrollment (Lieberman, 2024). This can lead to uncertainty and instability in teacher staffing which may push districts to alternative teacher employment plans, such as temporary contracts (Clem, 2023; Traxler, 2025).

Table 8.2 Predicting the Likelihood of a Public School Teacher Employment on a Temporary Contract (one year or less, or extended)

	Model 1	Model 2	Model 3	Model 4
Age	-0.00752*** (0.000586)	-0.00758*** (0.000658)	-0.00755*** (0.000584)	-0.00737*** (0.000577)
Years of experience	0.00289 (0.00209)	0.00516* (0.00229)	0.00369 (0.00205)	0.00379 (0.00209)
Male	-0.0412** (0.0148)	-0.0368* (0.0151)	-0.0405** (0.0149)	-0.0434** (0.0145)
Rural area – pop. up to 3,000	0.302*** (0.0343)		0.252*** (0.0495)	0.277*** (0.0477)
Small town – pop. 3,001 to 15,000	0.296*** (0.0416)		0.258*** (0.0454)	0.273*** (0.0433)
Town – pop. 15,001 to 100,000	0.0846*** (0.0246)		0.0788** (0.0256)	0.0981*** (0.0212)
City – pop. 100,001 to 1,000,000	0.178*** (0.0295)		0.171*** (0.0373)	0.171*** (0.0344)
School size (student enrollment)		-0.000101** (0.0000335)	-0.0000462 (0.0000291)	-0.0000395 (0.0000294)
Charter				0.178*** (0.0446)
Observations	2240*	2240*	2240*	2240*

*Observations rounded to the nearest 10

SOURCE: Organization for Economic Cooperation and Development (OECD), Teaching and Learning International Survey (TALIS), 2018; and U.S. Department of Education, National Center for Education Statistics, Common Core of Data (CCD), “Public Elementary/Secondary School Universe Survey,” SY 2017-18.

As might be expected, employment in a charter school is significantly associated with employment on a temporary contract. This sector of public schooling in the United States has become associated with variation in contracting and flexibility of policy implementation. School size is only significantly related to employment on a temporary contract when community type is excluded, (see Table 8.2 Model 2).

8.6.3 Research Question 3: What is the relationship between teacher contract type and teacher self-efficacy, job satisfaction, and career plans?

In the next analysis, we employ a categorical measure of contract type to explore variation in the relationship between contract type and measures of teacher self-efficacy, job satisfaction, and career plans (see Table 3). We compare between permanent contracts, and temporary one-year contracts, and temporary extended contracts more than one-year, to examine the relationship of contract type with our key career perceptions while controlling for other teacher-level characteristics. We also explore the relationship of contract type with efficacy, job satisfaction and career plans while also accounting for other factors involving teacher, school, and community characteristics (shown in Table 8.3, Models 1, 3, and 5). We then explore the idea that contract type may have a differential impact depending on the age or experience level of the teacher by adding interactions of these key measures to our models – shown in Table 8.3, Models 2, 4, and 6.

Our analyses here include all teachers in the public school sector, including both TPS and charter schools. As shown in Figure 8.6, we find that, when controlling for teacher characteristics (age, experience, and gender) and school and community characteristics (school size, charter status, and community type), teacher contract type is significantly related to both teacher self-efficacy and job satisfaction, as seen in Figure 8.6, but not to career plans.

Table 8.3 Relationship of Contract Type on Career Outcomes in Public School Teachers

	Model 1 – Self- efficacy	Model 2 – Self- efficacy	Model 3 – Job satisfaction	Model 4 – Job satisfaction	Model 5 – Career Plans (years)	Model 6 – Career Plans (years)
Temporary extended contract	0.216* (0.0974)	-1.079** (0.358)	0.666*** (0.0902)	0.845 (0.549)	-0.842 (0.588)	2.858 (1.878)
One year or less contract	-0.435*** (0.0903)	-0.785 (0.417)	0.0502 (0.0780)	-1.745* (0.684)	0.162 (0.395)	-1.254 (2.415)
Years of experience	0.0188** (0.00652)	0.0170* (0.00755)	-0.00225 (0.00576)	-0.00643 (0.00668)	-0.176*** (0.0208)	-0.187*** (0.0250)
Age	-0.00966* (0.00443)	-0.0159** (0.00550)	0.0240*** (0.00587)	0.0140* (0.00679)	-0.413*** (0.0232)	-0.395*** (0.0298)
Male	-0.440*** (0.0758)	-0.451*** (0.0754)	0.0508 (0.107)	0.0376 (0.0964)	1.123** (0.409)	1.114** (0.384)
Temp extended contract # Years of experience		0.0224 (0.0125)		-0.0241 (0.0144)		0.161** (0.0561)
One year contract # Years of experience		0.00602 (0.0115)		0.0219 (0.0149)		-0.0999* (0.0490)
Temp extended contract # Age		0.0250** (0.00857)		0.000626 (0.0140)		-0.128** (0.0429)
One-year contract # Age		0.00621 (0.0116)		0.0375* (0.0156)		0.0638 (0.0639)
Charter	0.517*** (0.109)	0.524*** (0.108)	0.170 (0.122)	0.138 (0.123)	1.138 (0.700)	0.970 (0.685)
Vector of school characteristics	Yes	Yes	Yes	Yes	Yes	Yes
Observations	2160*	2160*	2130*	2130*	2120*	2120*

*Observations rounded to the nearest 10

SOURCE: Organization for Economic Cooperation and Development (OECD), Teaching and Learning International Survey (TALIS), 2018; and U.S. Department of Education, National Center for Education Statistics, Common Core of Data (CCD), “Public Elementary/Secondary School Universe Survey,” SY 2017-18.

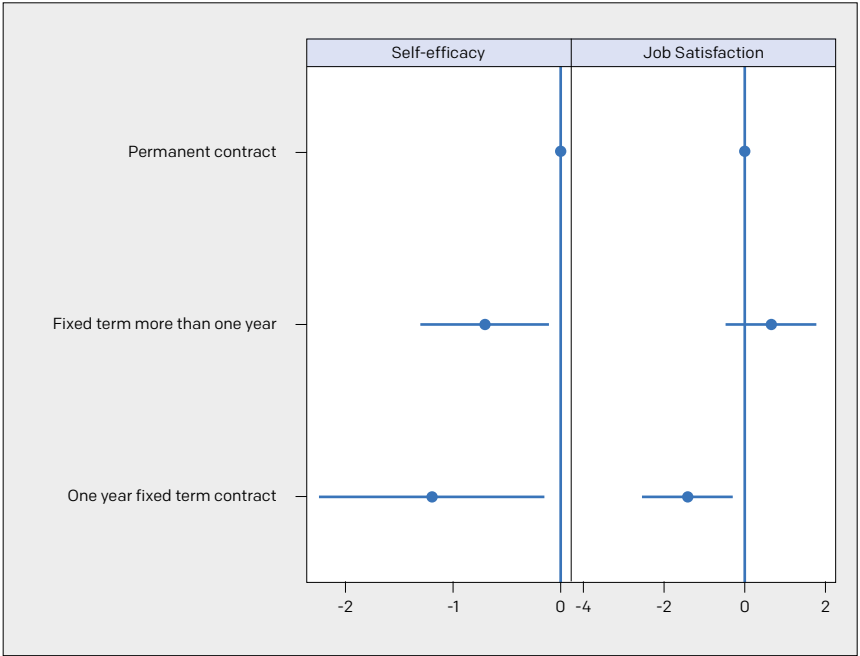


Figure 8.6 Contract type on Self-efficacy and Job Satisfaction

Note: Controlling for teacher age, experience, gender, community type, school size, and charter employment.

SOURCE: Organization for Economic Cooperation and Development (OECD), Teaching and Learning International Survey (TALIS), 2018; and U.S. Department of Education, National Center for Education Statistics, Common Core of Data (CCD), “Public Elementary/Secondary School Universe Survey,” SY 2017-18.

Contract type is significantly related to teacher-reported self-efficacy (Table 8.3, Model 1). When accounting for both teacher and school characteristics, we find that teachers on temporary extended contracts report higher self-efficacy and teachers on temporary one-year contracts report lower self-efficacy compared to teachers on permanent contracts. However, as we extend our analysis to account for differing relationship of contract type with self-efficacy across teacher characteristics, this relationship changes (see full model Table 8.3, Model 2). Employment on a one-year contract is no longer significantly related to self-efficacy, and we find that teachers on temporary extended contracts report different levels of self-efficacy depending on teacher age and experience. That is, the positive relationship of employment on a temporary extended contract, compared to permanent contracts, with self-efficacy was more significant for older teachers than younger teachers.

This may indicate that older and more experienced teachers are less likely to have negative perceptions on a temporary employment arrangement, or they have entered temporary contract arrangements toward the end of a career and therefore do not look for tenure status to determine self-efficacy. Several states also have introduced “return to work” initiatives to encourage newly retired teachers to temporarily continue working to offset shortages (Jarrold-Grapes & Mahler, 2024). These programs draw more experienced teachers who may have already qualified for tenure and retirement benefits but have chosen to enter a new temporary contract before fully retiring. Younger and less experienced teachers may be more likely to look to their current contract status as an indicator of their efficacy as teachers.

We next turn to job satisfaction. As highlighted in previous research, job satisfaction is related both to teacher effectiveness and to the likelihood to remain in teaching (Knox & Anfara Jr., 2013; Madigan & Kim, 2021). In our simple model (see Table 8.3, Model 3), employment on a temporary extended contract is positively associated with overall job satisfaction when compared with permanent-contract teachers, but employment on a one-year temporary contract is not significant. That is teachers on extended temporary contracts are more likely to report stronger job satisfaction compared to teachers on permanent contracts. This may be related to other factors that encourage teachers to leave and seek employment outside of traditional public schools settings, such as burnout in a high-stress position (Madigan & Kim, 2021). We also find that age is significantly related to job satisfaction in model 3 – indicating that older teachers report higher job satisfaction.

When we include interactions of contract type with individual teacher characteristics of age and years of experience, the relationship of temporary extended contracts to job satisfaction is no longer significant (see Table 8.3, Model 4). However, employment on a one-year contract is negatively associated with satisfaction – a relationship that is weaker with older teachers. This indicates that younger and less experienced teachers on one-year contracts reported lower job satisfaction when compared to those on permanent contracts, but the relationship is not as strong for older and more experienced teachers on one-year contracts. This finding may indicate that older teachers are less likely to be dissatisfied with a temporary contract arrangement. One possible explanation is that older teachers either chose the contract arrangement as an employment preference closer to the end of their career or perhaps have switched careers or retired elsewhere, and are less concerned with holding a tenured, permanent contract. There is no significant relationship between contract type and career plans when accounting for individual teacher characteristics.

8.7 Conclusion

In this chapter, we explore the prevalence of alternative, temporary teacher contracts and the relationship of contract types to teacher and school characteristics, and the relationship of contract type to career perceptions, job satisfaction and self-efficacy and future career plans. We find that teachers employed on temporary contracts are more likely to work outside of public education in private schools or, if within public education, in charter schools rather than in traditional public schools. Temporary contracted teachers are less likely to work in schools in large cities and are more likely to be younger, and early career teachers. In all public schools, both TPS and charters, teachers on temporary contracts differ from their peers employed on traditional permanent contracts. There are significant differences in terms of age, experience, job satisfaction, and self-efficacy.

Teachers on temporary contracts, one year or less or longer, tend to be younger and less experienced than teachers on permanent contracts. In the United States context, this is partially explained by procedures around tenure in traditional public schools. However, the trends extend beyond novice teaching years where teachers are more likely to be on temporary contract during their probationary period. Notably, teachers on one-year contracts report lower self-efficacy and job satisfaction. This could also be tied to uncertainty teachers face until reaching the job stability associated with tenure. These relationships are related to teacher age and experience. Younger teachers on a one-year contract reported lower job satisfaction than older teachers on one-year contracts. We also find that older teachers on temporary extended contracts report different levels of self-efficacy. Interestingly, no differences emerged regarding the future career plans of teachers on permanent versus temporary contract types; age and experience are significantly associated with career plans – which might be expected as older and more experienced teachers near retirement age.

These results cannot speak to the reasons behind these differences. The cohort of teachers employed in public schools on temporary contracts differs in key areas from their peers employed on permanent contracts. The post-pandemic workforce is leading to broad shifts in workplace expectations, including new and different expectations and labor demands of the newest workers in Generation Z. In addition to contract variation, there are reports of increased privatization in public schools and the outsourcing of key school services. The continued incorporation of market logics into public education and the potential impacts on the public workforce and student learning make this a pressing area for study. Long-standing public school staffing practices, such as a tenured teacher workforce employed on permanent contracts are being re-evaluated

and reimagined, especially as states continue to deregulate many of the policies governing teacher employment and hiring. Workplace priorities are shifting in favor of increased flexibility and improved employment options. Staffing agencies and temporary teaching roles may better fit these norms and appeal to a new group of potential teachers. If these new policies and practices help draw more personnel into teaching they could be a partial solution to addressing gaps in the teaching workforce and filling hard-to-staff positions (Hess, 2021; Kelly, 2021). The increase in the number of alternatively contracted – fixed-term and temporary – teachers may be expected to continue as school systems around the world address teacher staffing challenges alongside an ongoing decline in enrollment in traditional teacher preparation programs (Garcia & Weiss, 2019b; King & James, 2022; Van Overschelde & Wiggins, 2020). In contrast, temporary contracts may be the only employment option offered to some teachers, either because of uncertainties, such as declining student enrollment or because of changing economic conditions where governing bodies do want to commit to pay teachers longer term, which often includes related payments such as pensions.

While exploratory, the findings in this paper identify additional topics for further research and highlight key areas of concern and attention for policy-makers and school district leaders when considering their use of alternative contract types. Further conceptual and empirical emphasis on contracting is an important next step in understanding the phenomena. Ongoing research might consider the policy implications and emerging questions around equity and teacher community, and careers as market logics shape teacher employment arrangements through alternative contracts.

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Appendix Table 8.1 Self-Efficacy Composite Scale Items

T3SELF: Teacher self-efficacy, composite
T3SECLS: Self-efficacy in classroom management (subscale)
TT3G34: In your teaching, to what extent can you do the following?
Response options: "Not at all" (1), "To some extent" (2), "Quite a bit" (3), "A lot" (4).
TT2G34D Control disruptive behaviour in the classroom
TT2G34F Make my expectations about student behaviour clear
TT2G34H Get students to follow classroom rules
TT2G34I Calm a student who is disruptive or noisy
T3SEINS: Self-efficacy in instruction (subscale)
TT3G34: In your teaching, to what extent can you do the following?
Response options: "Not at all" (1), "To some extent" (2), "Quite a bit" (3), "A lot" (4).
TT2G34C Craft good questions for students
TT2G34J Use a variety of assessment strategies
TT2G34K Provide an alternative explanation, for example when students are confused
TT2G34L Vary instructional strategies in my classroom
T3SEENG: Self-efficacy in student engagement (subscale)
TT3G34: In your teaching, to what extent can you do the following?
Response options: "Not at all" (1), "To some extent" (2), "Quite a bit" (3), "A lot" (4).
TT2G34A Get students to believe they can do well in school work
TT2G34B Help students value learning
TT2G34E Motivate students who show low interest in school work
TT2G34G Help students think critically

Source: OECD, TALIS 2018 database.

Appendix Table 8.2 Job Satisfaction Composite Scale Items

T3JOBSA: Job satisfaction composite
T3JSENV: Job satisfaction with work environment (subscale)
TT3G53: We would like to know how you generally feel about your job. How strongly do you agree or disagree with the following statements?
Response options: “Strongly disagree” (1) “Disagree” (2) “Agree” (3) “Strongly agree” (4).
TT3G53C* I would like to change to another school if that were possible
TT3G53E I enjoy working at this school
TT3G53G I would recommend this school as a good place to work
TT3G53J All in all I am satisfied with my job
T3JSPRO: Job satisfaction with profession (subscale)
TT3G53: We would like to know how you generally feel about your job. How strongly do you agree or disagree with the following statements?
Response options: “Strongly disagree” (1) “Disagree” (2) “Agree” (3) “Strongly agree” (4).
TT3G53A The advantages of being a teacher clearly outweigh the disadvantages
TT3G53B If I could decide again I would still choose to work as a teacher.
TT3G53D* I regret that I decided to become a teacher
TT3G53F* I wonder whether it would have been better to choose another profession
T3SATAT: Satisfaction with target class autonomy
TT3G40: How strongly do you agree or disagree that you have control over the following areas of your planning and teaching in this <target class>?
Response options: “Strongly disagree” (1) “Disagree” (2) “Agree” (3) “Strongly agree” (4).
TT3G40A Determining course content
TT3G40B Selecting teaching methods
TT3G40C Assessing students’ learning
TT3G40D Disciplining students
TT3G40E Determining the amount of homework to be assigned

Source: OECD, TALIS 2018 database.

9 Education as a Matter of Public Concern: The Idea of Education as a Public Good Revis(it)ed in Light of Increasing Public-Private Entanglement

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“Het onderwijs is een voorwerp van de aanhoudende zorg der regering.”¹

Grondwet voor het Koninkrijk der Nederlanden van 24 augustus 1815, art. 23.1

Abstract

In the decades following World War II, as the welfare state expanded across Western nations, education was increasingly viewed as a public good. In light of recent “entanglements” of public and private dimensions in education I argue that it is more helpful to conceive of education as a matter of public concern. I clarify the main reasons why education is a matter of public concern and assess (in the abstract) which kinds of privatization, public-private entanglement, and/or blurring of the public-private distinction in the educational realm are problematic in light of those reasons and which are not, as well as which kinds of publicness are problematic (in other words, on which points, if any, privateness is preferable over publicness). Finally, I discuss the implications of recent developments in the public-private dimension of education for

¹ “Education is a subject of continuing governmental concern.” This is the opening line of Article 23.1 of the Dutch Constitution (Constitution of the Kingdom of the Netherlands of August 24, 1815). Note that “zorg” can also be translated as “care,” and in this case is probably meant to carry both connotations.

the idea of education as a matter of public concern. Thinking of education as a matter of public concern allows us to consider all the public values that the idea of education as a public good drew attention to – justice, individual and collective well-being, and the public interest in maintaining a certain kind of society – while taking a more nuanced and context-sensitive position that does not insist on an absolute, centralized state provision of education.

9.1 Introduction

Some time after I graduated, the Dutch secondary school I attended became part of a larger group of schools under one administration, called Scala. Several years later, a large billboard was erected at the edge of the school grounds, informing all passing car drivers and cyclists: “Scala zet je op voorsprong,” which translates as “Scala gives you a headstart” or “Scala gives you an advantage” – a slogan I have always found odd and somewhat unsettling. Apparently, this school organization does not care about education *as such*, as something that is intrinsically and instrumentally valuable for *all* individuals and for society at large, but only about helping *its own students* succeed. To me, this seems odd because I always assumed educational institutions to be committed to the good of *education*, not just to the career success of its own students; and I find it unsettling for the same reason and because the management of this school organization apparently has no qualms about pitting the future citizens of Dutch society against each other in a race for the goods that participation in society has to offer. Instead of solidarity, it posits competition; instead of common fate, individual success. Clearly, this is an example of the privatization of education, a process that has taken place in many parts of the world over the last decades – “privatization” in the sense of a shift in the degree of “publicness” of education towards the “private” end of the spectrum. The Scala school organization employed this marketing slogan in an attempt to position itself favorably in the educational market, to persuade parents to enroll their children in one of its schools, implicitly telling them: we are not here to serve the public good, but to serve *you*, and *your* children.

But this is just one example of the shift along the privateness-publicness dimension in education – there are many other examples, and it is not evident up front that all of them are problematic, or even how to assess this. As the editors of this volume explained in the introduction, in recent years the “private” and the “public” have become entangled to such an extent that it is no longer helpful to think in terms of separate private and public sectors (see also Waslander, 2021). Rather, in education as in many other domains, we see hybrid

constellations with varying degrees of “publicness” and “privateness” along different dimensions.² It is important to (be able to) evaluate such developments, but in order not to stack the deck against “incursions” of privateness in education, we must avoid assuming that education is and needs to be “public” in all respects (i.e., part of what used to be called the “public sector”). As I will argue, it is more helpful to think of education as a *matter of public concern* than as a “public good.” By reflecting on the reasons why education is, and should be seen as, a matter of public concern, we gain clarity on the criteria by which we can evaluate the “privateness” and “publicness” of educational institutions, as well as, of course, hybridity in education.

My overall aim, then, is to develop an evaluative framework for distinguishing desirable from undesirable forms of privateness, publicness and private-public entanglement, and to apply this framework to some examples from the educational sphere. More specifically, my objectives in this chapter are: firstly, to propose that, for the purpose of safeguarding the publicness of education, it is better to think of education as a matter of public concern than as a public good (section 2); secondly, to clarify the main reasons why education is a matter of public concern (section 3); thirdly, to assess (in the abstract) which kinds of privatization, public-private entanglement, and/or blurring of the public-private distinction in the educational realm are problematic in light of those reasons and which are not, as well as to assess which kinds of publicness are problematic (in other words, on which points, if any, privateness is preferable over publicness) (section 4); and finally, to discuss the implications of recent developments in the public-private dimension of education for the idea of education as a matter of public concern (section 5).

9.1.1 *From Education as a Public Good to Education as a Matter of Public Concern*

In the context of the growth of the welfare state after World War II it became common to think of education as a public good, a concept borrowed from economic theory (Daviet, 2016: 2; Locatelli, 2018: 2). However, the application of this concept to education has been problematic from the outset. According to the standard economic distinction between public goods and private goods, public goods are goods with two characteristics: they are “non-rivalrous” and “non-excludable” (Samuelson 1954; Musgrave 1959; see Reiss 2021). If a good

2 At the same time, though, it is worth noting that many education systems have always shown a degree of public-private hybridity – in the Dutch case a quite significant degree (De Vijlder, 1996; Onderwijsraad, 2021).

is non-rivalrous, an individual's consumption of the good does not diminish others' ability to consume it. In other words, consumption does not reduce the amount available to others. Non-excludability means that others cannot be prevented from consuming a good. For example, my enjoyment of the music of a street band performing in a public square does not diminish the ability of others to enjoy it at the same time. The "amount" of music is not depleted by my consumption. Since this is a public space, anyone is free to enjoy this music.³ The service a lighthouse provides is another example: even if it were financed privately by a particular shipping company, once operational it would provide its service to all passing ships. The central idea this distinction is meant to serve is that the distribution of goods should in principle be left to the market and that governments should only step in where the market fails. This intervention should happen when goods are non-rivalrous and non-excludable, because in these cases people (at least according to the model of *Homo economicus*) tend to act as free riders: they benefit from a public good or service without contributing to the cost of providing it.

Now, if we look at education as a good people desire, it is clear that this does not meet the criterion of non-excludability: it is indeed possible to exclude people from education, i.e., to limit access to it. Also, some types of education are rivalrous because of the limited number of places available. Furthermore, if we look at the *benefits* education offers, it is also clear that many of these are private (Anomaly, 2018: 106; Higgins, 2018: 805). In short, education is *not* a public good in the classical economic sense.

Then why do people insist that education *is* a public good? One reason is that, from an economic perspective, education can be considered a public good because its benefits extend far beyond the individual recipient to society as a whole. Insofar as better quality education benefits the economy as well as the quality of democratic institutions and policy, for instance, *everyone* benefits not just from their own, but also from other people's education (Anomaly, 2018: 106). As Higgins writes succinctly: "[T]he effects of education radiate beyond the individual student" (2018: 804). This is something that individuals probably fail to take into account sufficiently, so from this point of view market

3 Yet this example also shows how difficult it is to find examples of *completely* non-rivalrous and non-excludable goods; the amount of space available in the square is limited, after all, so it is conceivable that enjoyment of the music – or at least having the opportunity to enjoy the music – could become a rivalrous and excludable good. Economists and others have therefore refined and expanded their categorizations to include, apart from pure public goods, that are both non-rivalrous and non-excludable, also impure public and private goods, constituted by some mixture of the two characteristics (Cornes & Sandler, 1986). They have further distinguished, for instance, between partial and full public goods, and local, national and global public goods (Reiss 2021).

failure can still be offered as a justification for government intervention (Daviet, 2016: 4). A second reason is that, from an ethical perspective, there is much to be said for the idea that the state ought to provide quality education for all, since this is a human right (Locatelli, 2018), or to ensure equity. Private provision of education would fail to satisfy an *ethical* demand of non-excludability (Daviet, 2016: 3).

But there are arguably better ways to take these considerations into account than to insist that education is, after all, a public good. For not only is education not a public good in the classical economic sense, the economic perspective from which the distinction between public and private goods derives is also – as we have seen – too narrow to incorporate important ethical and political considerations. Furthermore, the reality of education systems is (increasingly) such that it cannot be shoehorned into the concept of a public good. Education has many aspects, some of which are more like public goods than others; and in the educational sphere the public and the private are entangled in many ways.

Some suggest that a better way to accommodate the publicness of education is to label education as a *different* kind of good, such as a *common good* (Daviet, 2016; Locatelli, 2018). “Common goods are those that contribute to the general interest, enabling society as a whole to be reinforced and to function better, as well as individuals to live better” (Daviet, 2016: 8). However, framing education solely as a “common good” creates an incomplete picture, excluding other essential dimensions, triggering a repetitive debate. As in the case of the idea of education as a public good, there are things to be said for it as well as against it. For instance, viewing education merely as a common good masks the harsh reality that education benefits some significantly more than others. It also assumes rather too uncritically that education is by definition a *good*, whereas there is a strong argument to be made that education has contributed greatly to collective problems such as our current ecological crisis (Orr, 2004).

A more promising way forward, therefore, seems to be to observe that education is a matter of public *concern*, and to concentrate our attention on the various reasons why this is so, as a matter of fact, and why it is rightly so. By “public” concern I mean *both* governmental concern and that of the public at large or “society.” I view governments as emergent agents, as expressions of the ways in which collectives have organized themselves in order to achieve a form of collective agency – which, on some level, is true even for non-democracies. And I conceive of societal concern (as expressed, for instance, in “public” debate) as co-determining the nature and intensity of governmental concern

— and this particularly in democracies.⁴ Attention to the reasons why education is a matter of public concern can help us decide whether, where, when, and to what extent public concern should lead to particular forms of publicness in education.

In other words, what I am saying is that critics of privatization in education often defended the view that education is a public good, but due to conceptual problems and its one-sidedness, this is an untenable position. So for those interested in safeguarding the publicness of education — now bear with me while I use a martial metaphor — a tactical retreat is advisable to a much better defensible position, i.e., the view that education is a matter of public concern. From that position — picture being on higher ground without taking the moral high ground — we can then survey how much of the terrain we gave up can be regained — or rather, how much of that terrain we can legitimately lay claim to.

9.2 Reasons Why Education is a Matter of Public Concern

Why is education rightly a matter of public concern? A helpful way to track down positive considerations is by analyzing their negatives, so in this case our starting point would be imagining education as *not* being a public concern. I will first consider what undesirable situations might emerge if education were in fact not an object of *governmental* concern, but rather left to private persuasion and initiative entirely.

9.2.1 What if Education Were Not an Object of Governmental Concern?

One thing we might see is varying levels of parental investment in education: some parents might be highly invested while others might face substantial barriers that prevent or hinder their involvement, or simply care less. As a result, some children would go without formal education, and perhaps receive very little education at all beyond vocational training or the “school of life.” The quality of education would probably also vary immensely. This, in turn, would strongly affect children’s chances in life: their chances of success in various fields, of attaining a certain level of welfare and social recognition, and generally their chance to become “happy.” In short, without public interfer-

4 My proposal to view education as a matter of public concern is therefore different from Samuelson’s (1972: 52) observation, cited in Anomaly (2018: 108), that “the existence of nonexcludable externalities gives us, at best, a *prima facie* case ... for social concern and scrutiny of the outcome,’ not an automatic case for government action.” The difference comes out in Samuelson’s use of the word “social,” which seems explicitly intended to distinguish it from governmental concern.

ence education could well become a highly unequally distributed good.⁵ As Brighouse, Ladd, Loeb and Swift (2018: 1) argue: “Decisions about education influence (...) [people’s] capacities to live flourishing lives, and how those capacities are distributed across the population.”

There are two reasons wrapped into one in the above: 1) most parents and caregivers want their children to flourish, and 2) most if not all people care about justice. What makes them reasons why education is a matter of public concern may differ, though, depending on how they are interpreted and what one means by “public.” Charles Taylor (1995) coined the term “convergent goods” for what economists define as “public goods,” because “they are still essentially private goods, objects of separate private valuations that happen to converge” (Higgins, 2018: 804). So there are non-convergent private goods (where different people privately value different things) and convergent private goods (where different people privately value the same things). But there is also a fundamentally different category of goods, which Taylor calls “common goods.”⁶ In this case the valuing is not private but shared and mutual – as with friends’ interest in their friendship. Friends are not people who have come together because they found out they both have a general interest in friendship and decided they would both benefit if they pursued this interest together. The “good,” in the case of friendship, lies in the commonality, in the shared experience, in *this particular* relationship. Walter Feinberg employs a similar distinction between “individual values held individually” and “shared values held individually” on the one hand, and “common values” on the other, but observes that “common values” can be held in two different ways: unreflectively and reflectively. He reserves the term “public values” for “that subset of common values that we are able to lift into the foreground and subject to critical reflection” (Higgins, 2018: 805).

Now, what kind of reasons are the two we identified so far? As said, that depends on their interpretation. To see how Brighouse, Ladd, Loeb and Swift interpret them, let us take a look at the context in which the previous quote occurs:

5 Clearly, education *is* a highly unequally distributed good already, but this would probably be even more so, just as it was before the advent of mass (compulsory) education. A second point worth qualifying is the signification of education as a good: this is a rather complex matter, because one could point out many reasons why common formal education acts both as a “bad” and as a “good” for those on the receiving end, and yet at the same time it could still be a “good” in the sense that without it (i.e., without certain diplomas) many doors in life would remain closed.

6 N.B. Taylor uses this term in a different sense than Daviet, cited above.

Societies have to make decisions about what children should learn, how to teach them, how to divide teaching between family and school, and how many resources to allocate to the education of different children. Education is the process that transforms newborn infants into adults with characters and temperaments, with skills and abilities, with beliefs and attitudes. Decisions about education influence the character of the whole of society. They shape the way people become individuals, their capacities to live flourishing lives, and how those capacities are distributed across the population.

Policy makers at top levels of government, teachers in individual classrooms, and parents all know that their decisions matter. Because these decisions affect such fundamental concerns – how well people’s lives go and whose lives go better than others – they are morally significant. Aware of that significance, most education decision makers want to make morally responsible decisions. (Brighouse, Ladd, Loeb & Swift, 2018: 1)

“Decisions about education influence the character of the whole of society” – at first sight that sentence may seem to suggest a perspective close to that adopted by economists who write about education as a public good, because the point seems to be that (even) *private* decisions have *public* consequences.⁷ How parents raise their children is therefore not just their business and their children’s concern, but *everyone’s* business. Similarly, any decision about a child’s formal education is, at least to some extent, everyone’s concern. In economic terms: childrearing and education can have both negative and positive externalities that are non-rivalrous and non-excludable, making them matters of public concern. In fact, the notion that government intervention in education – through funding or direct provision – is necessary is often supported by this economic argument: “without public subsidies or mandatory school attendance, some parents will fail to adequately educate their children” and “without government intervention, people will ignore the positive effects their education has on others, so they will consume less education than is socially optimal” (Anomaly, 2018: 105).

7 This interpretation is supported by the occurrence of other sentences in which they look at education primarily in terms of private goods (as Higgins [2018] also noted about many defenders of public education), or education’s spillover effects: “To spend resources on education is to invest in children’s future flourishing by producing educational goods.” (Brighouse, Ladd, Loeb & Swift, 2018: 41; my emphasis) and: “Cognitive skills and socio-emotional capacities are educational goods because they generate value in the current period for those who are being educated and contribute to their future income and health and hence to their overall well-being. They also benefit others, whose lives go better through the actions of those being educated.” (Ibid.: 21; my emphasis.)

Yet it is possible to see implicit in the statement quoted above something more than this narrow or meager interpretation of “public” concern, more than a convergence of private valuations. The authors note that decisions about education influence the *character of the whole of society* and that they shape *the way people become individuals*. This calls to mind the work of educational philosopher Gert Biesta and other authors inspired by Hannah Arendt’s political and educational philosophy. The public-private distinction figured strongly in Arendt’s analysis of modern (mass) society (Arendt, 1998, 2006). She emphasizes the importance of the public sphere as a space where human beings can come together despite and even, in a sense, thanks to their differences – their “plurality,” their different perspectives on the world – in order to deliberate together about public affairs. But she also highlights the importance of preserving and protecting a private sphere, away from “the glare of the public” (Arendt, 1998: 52; cited in Higgins, 2018: 809) – particularly for children, “who by nature require the security of concealment in order to mature undisturbed” (Arendt, 2006a: 185). Arendt observes with concern that in modern (consumer) society the private and the public sphere lose their distinctiveness; instead, we see the rise of “the social,” in which the private, which she identifies as the sphere of consumption and the fulfilment of needs and desires, becomes public – in fact, threatens to make up the *whole* of the public. Arendt writes:

What makes mass society so difficult to bear is not the number of people involved, or at least not primarily, but the fact that the world between them has lost its power to gather them together, to relate and separate them. The weirdness of this situation resembles a spiritualistic séance where a number of people gathered around a table might suddenly, through some magic trick, see the table vanish from their midst, so that two persons sitting opposite each other were no longer separated but also would be entirely unrelated to each other by anything tangible. (Arendt, 1998: 52–53, also cited in Higgins, 2018: 810).

Paradoxically, people are now all together in their animal sameness as consumers pursuing their private interests, but they have lost what they had in common: each pursuing one’s own interests does not equal plurality, nor does sameness equal commonality. (“Scala gives you a head start...”)

The educational implication, as Higgins (*idem*) sees it, is that “[t]he schools struggle (...) to embody public goods, but it is not clear that they fare any better in helping students individuate, a process that requires articulation between public and private spheres and a rhythm between public provocations to self-enactment and private spaces of regroupment.” We see here, too, a concern

both with the “character of the whole of society” and how education “shapes the way people become individuals.” With regard to the former, Biesta (2012: 693) speaks of “a concern for the public quality of human togetherness and thus for the possibility of actors and events to become public,” and for the latter he coined the term “subjectification” as a third dimension, apart from qualification and socialization, that any conception of good education ought to take into account (see, for instance, Biesta, 2010).

Education influences the quality of “human togetherness” through the way it shapes children’s ability and courage to “act,” to take responsibility for how they use their freedom, as well as, for instance, through how schools themselves operate in the public sphere (recall the example at the beginning of this chapter). They also do so “simply” by sharing the world with children, placing it “on the table,” making the world a “common good,” so that the new generation is given the chance to make it its own and change it (Masschelein and Simons, 2012: 105). Whether or not Brighouse, Ladd, Loeb and Swift intended it, we may see the fact that education plays this role (though perhaps not always very well) as an important reason why education is – or should be – a matter of public concern in a more substantial sense than that of the convergence of private valuations.

9.2.2 What If Education Were Not Subject to Public Scrutiny and Debate?

Now try to imagine a situation where education is public (state funded and provided) but *not* something “the public” is concerned with – i.e. *not subject to public scrutiny or debate*. One reason why this would be problematic is (again) because the education children receive directly influences their life chances, meaning that parents *ought to* care about the quality of education. Such a worry might be alleviated to a certain extent by the fact that the State has an interest in the quality of education as well; but it would be naïve to suppose that the interests of children and parents on the one hand and the interest of the State on the other coincide perfectly. A related concern would be that the government would not be held to account for its policies regarding the education of disadvantaged groups, children with special educational needs, or other groups that deserve specific attention.

A different reason why a complete lack of public scrutiny would be problematic is that the State would then in fact have *carte blanche* to determine the *contents* of education. And what I wish to highlight here is not the same as a concern with the “quality” of education in terms of its efficiency in getting children to read, write, do sums, et cetera, but more broadly with what education teaches children about the world and how it shapes their outlook on

life.⁸ Presumably all parents care about “truth” and “truthfulness,” and this is both a shared value and a bone of contention – it is where society reveals its “plurality” in Arendt’s sense. Think, for example, of controversies over the teaching of sex education, climate change, and creationism vs. evolutionary theory. I would argue that people’s concern – on *both* sides of each divide – is really for what used to be called children’s souls. The devoutly religious may be concerned for children’s salvation, for the fate of their eternal souls, but more liberal believers and the secular surely also cannot bear the thought of their child coming to believe in myths long debunked, in their view, by reason and science. Speaking as a father, I would find it extremely painful, for instance, if my child were to come to literally believe that the world was created by God in seven days or that homosexuality is a sin because it is not what God or nature intended; and I am certain that other parents feel the same way about certain particular views (possibly the contrary ones). Obviously, this goes far beyond a concern with the qualification function of education and its implications on the job market. What this suggests is that the concern with the (truly) *educational* in education comes into view most clearly when we ask why a total lack of public scrutiny would be problematic.

It is worth noting that people’s concern for truth implies a difficulty in the application, in this context, of the notion of a common *good*, and a reason to favor that of a common or public *concern*: the “truth” that people are all interested in is not so much a common good in the same way that a friendship is, but is rather like the table in Arendt’s metaphor: it brings people together over a common concern on which they differ. And actually, if this is true for people’s concern for education’s “truthfulness,” it must certainly also be true for the shared “project” of democracy – an undertaking that, except in its inception, was rarely deliberately undertaken as a project by anyone, but still requires citizens to engage and manage their shared existence collectively despite diverse backgrounds, opinions, and interests.

A final point to make before the conclusion of this section: one reason why, in most if not all countries, education is in fact a matter of public concern, in the sense that the public at large cares about it, is that it is at least partly publicly funded. The fact that people pay for education through taxes fosters a shared sense of ownership and accountability. Now, if public concern in the sense of civic concern and engagement with education is seen as valuable (e.g., for reduc-

8 The difficulty with the term “quality” (in the sense of how good something is, not that of a trait or characteristic) is that it can mean almost anything, depending on the criterion in use; a common use in this context refers to the effectiveness and efficiency of education in its qualification function, but someone could also deplore the quality of an education focused solely on acquiring credentials, even if it is highly efficient at producing those credentials. See Biesta (2022: 14–16).

ing cultural bias in education or maintaining educational quality through a watchdog role), this in itself provides a reason for making education a concern of the government, and for public funding and/or provision of education.

To sum up: as members of a society we find ourselves, at least in some sense, in the same boat: individual actions, however small, can significantly impact others and the collective, sometimes even on a global scale. Particularly, how others educate their children – or fail to do so – or how they would educate or fail to educate their children in the absence of state-provided education – directly impacts the broader community. This gives us as private individuals and citizens a number of reasons to care about how children in our society are educated: reasons to do with what we hope for our own children; reasons to do with what we hope for all children and what we believe all children deserve, including reasons of justice; and reasons to do with what we hope for our society, both because of what this means for ourselves and for moral reasons. Governments, in turn, (need to) care about education simply because citizens care about it, because of its crucial importance for social stability and societal continuity, and because of its potential effect on the quality of “human togetherness” (e.g., the “health” of democracy). In almost all countries, the State provides the overwhelming majority of compulsory education. From this perspective, people have a vested interest in education both for general societal reasons (as mentioned above) and for personal reasons, specifically because their own children are directly impacted as recipients of the educational system. This latter fact makes education a matter of public concern, firstly, in the sense of convergent private goods (presumably all parents want their children to have a “good” education defined as one that efficiently fosters essential knowledge, skills, and understanding), and secondly, in the stronger sense of a common concern (in so far as a democracy, or any society for that matter, is a common “project” rather than a given structure).

9.3 Evaluating Privatization, Public-Private Entanglement, and Publicness

We have discussed a range of reasons, different in nature, why education is and ought to be a matter of public concern. These reasons in turn point to values that are at stake. For example, we have seen that one reason why education is and ought to be a matter of public (here at least also in the sense of governmental) concern is that if it were not, some children might receive very little or very poor quality education. This is a reason why education is and ought to be a matter of public concern, because we have

reason to care about the accessibility of education. There are two main reasons to care about the accessibility of education: firstly, unequal access (unrelated to educational potential or achievement) is unjust, and access to education is important for people's (future) well-being or flourishing. In this way it is possible to articulate the values underlying the reasons why education is and ought to be a matter of public concern. Space does not permit me to show the reasoning for each of the reasons identified in section 3, but the terms used should enable the reader to link the values named below to the reasons identified above without too much difficulty. Articulating the values underlying the reasons is important, because this will enable us to formulate criteria by which we can assess the desirability of privateness and publicness in education. We can distinguish between proximal and ultimate values:

- i. The first proximal value at stake is the *accessibility* of education. The ultimate values at stake here – the reasons why accessibility matters – are justice and human flourishing. As a matter of justice all citizens, young and old alike, have an equal right to good education, and the reason why access to education matters to people, ultimately, is that it is supposed to improve people's lives – in that it increases people's chances of flourishing in life, where flourishing is understood as a hybrid of subjective well-being and objective goods, including moral virtue.⁹
- ii. A second proximal value, or couple of values, is constituted by the functions of *qualification* and *allocation* that educational systems perform. The ultimate values served by these are human flourishing, here with an emphasis on the aspect of well-being, and societal stability and continuity.
- iii. A third proximal value is constituted by the educational functions of *socialization* and *subjectification*.¹⁰ This derives from the ultimate value of human

9 A lot more could be said about this. E.g., I have argued elsewhere that we ought to go beyond *human* flourishing as the ultimate aim or justification of education (Schinkel, 2025); and at the same time it is far from certain that education always increases people's chances of flourishing; for some kids, ten or twelve years of compulsory schooling may be hell and (therefore) prepare them for a much worse life than they might otherwise have had (Goodman, 1972). That said, this concern for flourishing is precisely one of the reasons why education is a matter of public concern and why education's contribution to flourishing is an important criterion by which to assess educational arrangements. For the hybrid conception of flourishing, see, for instance, De Ruyter (2004) and De Ruyter et al. (2022).

10 Biesta (e.g. 2010) chooses to distinguish subjectification sharply from socialization, which he lumps together with qualification as functions that adapt children to society, "inserting" them into the existing order, whereas subjectification does the opposite, making them stand out from that order, individuating them as responsible agents. Responsible agency and individual initiative in any domain requires "literacy" in that domain, however; it presupposes induction in the respective mode of thinking (Peters 1970); and at the same time, though one cannot entirely "produce" a "subject" of the type Biesta is looking for through socialization, socialization can prepare for it, enabling children to make the leap, as it were. So I choose to place socialization and subjectification together.

flourishing, here with an emphasis on the aspect of virtue, as well as two societal values: the “quality of human togetherness” (including the value of democracy), and preservation of the conditions for societal renewal.

- iv. The fourth and final value is the *intrinsic value of education*, or the “educational” quality of education; this can either be seen as ultimate in itself (in which case it makes no sense to distinguish a proximal value) or as a proximal value with again human flourishing as the ultimate value, with an emphasis on truth and beauty – to complete the classical triad.¹¹

The proximal values articulated here lend themselves to the formulation of assessment criteria: *(re)arrangements of publicness and privateness in educational systems should be such that they do not detract from, and preferable promote:*

- 1) the accessibility of education;
- 2) the educational system’s ability to perform its qualification and allocation functions;
- 3) the educational system’s ability to perform its socialization and subjectification functions;
- 4) the intrinsic value or the educational quality of the education that occurs in it.

Some arrangements or changes in arrangements of publicness and privateness in education may promote one proximal value while detracting from another. When such value conflicts occur it is important to reflect on them in terms of their combined effect on or implications for the ultimate values they are supposed to serve. Naturally, no method exists for arriving at the “right” answer; criteria of this nature cannot be “applied” to cases the way one can apply a hammer to hit a nail. Their employment is rather a matter of reasoned reflection, meaning that people may always (reasonably) disagree; and people are most likely to disagree about the interpretation and weighing of the *ultimate* values. All this is, again, a reason why education is and ought to be a matter of public concern, including public debate.

To suggest how this framework may help us evaluate the desirability of particular public-private arrangements I will offer two examples before turning, in the next section, to current developments in public-private entanglement. The first is an example of commercial influence in schools that I use to illus-

¹¹ It could be argued that this overlaps with the third value (pair), in particular with subjectification, in so far as the latter could be seen as a special moral-political form of the awareness, understanding and responsabilization that characterize experiences people would describe as truly educational, but the intrinsic value of education is certainly not exhausted by subjectification.

trate the application of the fourth criterion. Brighouse (2005) describes and evaluates the notorious US case of Channel One. These are the facts of the case:

Channel One provides schools with television and video equipment on the condition that the schools agree to have their students watch 12 to 13 minutes of Channel One programming a day. The schools get free access to something they would otherwise have to pay for, and this frees up resources for other uses such as hiring an extra teacher or paying for other facilities. Channel One makes a profit because its programming is sponsored with advertisements, which the children get to—or, to put it more accurately, *have to*—watch. (Brighouse, 2005: 529)

If public funding was previously the default, this is an example of relative privatization. At any rate it is a by now long-established form of public-private entanglement, where schools are largely publicly but to some extent also privately funded.

Brighouse objects to this arrangement primarily on the basis of what he calls the “anti-commercial” principle, which is itself derived from “a deeper principle that the ethos of schools should be discontinuous with the mainstream culture” (Brighouse, 2005: 530–531); and this, in turn, is ultimately founded on the value of autonomy and the idea that education should foster children’s autonomy. While I think that Brighouse’s argument is partly on the right track, it seems to me that a less laborious defense of anti-commercialism is possible, one that relies less on contestable empirical assumptions about education’s effects on children’s autonomy. The fact that schools influence the kind of people children become by acting as agents of socialization and subjectification, and that their primary concern should be that as much as possible of what happens there is ‘educational’ in a substantive sense, means that schools need to be a certain kind of place – a place devoted to children’s education – and also that they need to *signal* that they are that kind of place. The latter is part of socialization: schools should signal that education matters; that the world is interesting, fascinating, worth knowing and understanding; and that education supports a worthwhile life. The Channel One deal, then, is fundamentally at odds with what schools are and what they are for. In the end, it is the multi-layered importance of education, if anything, that justifies compulsory schooling; nothing can justify compulsory ad-watching or trading educational time for a TV set.

Michael Sandel (1998; 2013) offers a framework that enables us to articulate this concept further. As Bryan Warnick (2017: 73) explains, “Sandel has offered two reasons why we should be wary of bringing market forces into areas of

life outside of the economic sphere, such as the area of education.” One is that financial incentives can be coercive under conditions of scarcity (Sandel offers the example of someone who needs to sell a kidney to feed his family), the other is that marketization corrupts practices and situations by changing the meaning of the good at hand in a problematic way. The point I made above can now be reformulated as such: the Channel One deal corrupts education by changing the meaning of education as a good for the worse: its worth is diminished by bartering away time for education, making it something one can exchange for a piece of equipment that in itself has no significant educational value. Furthermore, there is the aspect of “coercion” or relative unfreedom, which is linked to inequity: well-funded schools don’t need to sell educational time for technology, whereas underfunded schools may feel forced to participate in incentive programs because they cannot otherwise afford basic equipment.

Finally, it is worth noting that through this deal, a commercial, non-educational party like Channel One gains a say in the school curriculum. This clashes with concerns for the intrinsic value and educational quality of education. Teachers and other educators have a legitimate stake in education policy, curriculum development, and school decision-making – and so do children’s parents or legal guardians, the government, and society at large. Commercial companies do not have a legitimate stake in education – except with regard to reasonable concern with qualification and allocation, and the quality of vocational education.

The second example I wish to briefly discuss here concerns a kind of excessive publicness, and is an example of educational rearrangements that fail with respect to the third and fourth criterion. In 2010, the right-wing Christian-conservative and nationalist Fidesz-KDNP alliance led by Viktor Orbán won a landslide victory in the Hungarian parliamentary elections. This gave them a two-thirds majority in the National Assembly, allowing them to amend or replace the constitution. Between 2010 and 2026, when Orbán’s party lost the elections, Orbán’s government introduced a great number of educational policies intended to promote their ideological agenda. As a Hungarian researcher observes,

the process of reworking the national curriculum (2018–2020) showed an increasing preoccupation with ideological control over taught content. For instance, the works of Nazi sympathiser writers were integrated in the literature curriculum and, contrasting scientific evidence, a mythical reinterpretation of the origin of Hungarians and Hungarian language are promoted in the textbooks. (Neumann, 2023: 652)

Excessive government interference with school curricula at the cost of educational quality, with problematic effects on child socialization and subjectification (though here the latter, of course, is a matter of perspective and would require extensive argument) constitutes a form of excessive publicness. Also, there is evidence that this government's policies have limited *de facto* educational access for refugee children (AIDA/HHC/ECRE, 2023: 91). All in all, due to the clearly anti-democratic and authoritarian nature of the educational "reforms," they can be judged to constitute an excess of governmental "publicness," strongly curtailing the freedom of parents and educators to choose the education they want for their children and students (i.e., the other aspect of publicness).

Now, one could object that this is a democratically chosen government, supported by a large majority of the Hungarian electorate; so how can these policies be called anti-democratic? In reply I would say that while we should indeed be careful not to call policies anti-democratic as soon as they do not fit *our* political views, policies can nevertheless be called anti-democratic when they seek (in Arendtian terms) to diminish "plurality," the potential for political disagreement that is inherent in the human condition, and this seems to be the case here. It is not merely a matter of one take on Hungarian history being replaced by another, but of replacing proper historical interpretation, which by necessity allows for plural perspectives, by an ideological "interpretation" of Hungarian history that is meant to lie beyond falsification. So it seems fair to say that these policies diminish plurality, and as such, they also (seek to) diminish the potential for societal renewal.

To conclude this section, in which I focused on two specific examples, let me briefly address two anticipated general questions about the proposed framework. Firstly, does acceptance of this framework mandate that primary and lower secondary education must be publicly funded and government provided (e.g., as a means to ensure equal access and allay concerns about the abuse of education for ideological purposes)? If the answer is categorical that would be a weakness because it implies a lack of contextual sensitivity. However, I think the answer to this question is: in many contexts, yes, but not *a priori*, not always and everywhere. In contexts where governments are weak and public educational provision cannot meet educational demand (or people's educational needs), the demand that primary and lower secondary education must be publicly provided could be counterproductive. Certain cases of non-state provision of education in Africa and Asia, especially where education is provided by NGOs, are cases in point (Rose, 2009).

Secondly, what about values like transparency, accountability and efficiency? Should these not also be used to assess public-private arrangements

in education? My answer would be yes, of course, these are important secondary values. But transparency and accountability are entirely in service of the values identified above: it is because we are concerned that existing arrangements may not actually promote and safeguard those values – but instead, for instance, serve particular private interests – that we want arrangements to be transparent and agents to be accountable. And efficiency, too, is empty in itself (arrangements can be efficient at attaining their ends, regardless of the value of those ends); it is a value in service of other values, reminding us that the costs of any arrangement should be proportionate to the benefits *and* defensible in light of opportunity costs – resources spent on education could also have been used for other important things, after all. My main point about these values or considerations is that we must never forget that they are secondary – useful only because of how they serve other values.

9.4 Implications of Recent Public-Private Entanglement for the Idea of Education as a Matter of Public Concern

I have argued that one important implication of the current public-private entanglement in education for the idea of education as a public *good* is that it is better to replace this with thinking about education as a matter of public *concern*. We still need to ask, however, what this entanglement implies for the latter. What reality does this idea capture, and how is this changed by recent developments? For instance, do we see developments that (may) influence the extent to which education is *in fact* a matter of public concern, or the extent to which it is perceived as *rightly* a matter of public concern?

Education is a constant topic of public debate, and expectations are high and diverse – not only should education fulfil its qualification, socialization, and (for some) subjectification functions, it is also expected more specifically to promote each unique individual's development, to counter social inequality, contribute to “integration” and social cohesion, address climate change and other ecological problems, and so on. Developments such as the rise in “shadow education,” mixed public-private financing, and private practice teaching – in a context of teacher shortages, rising concerns over falling student (and teacher) literacy and numeracy, and other problems – have fueled public attention and elevated education to the top of the political agenda.

Yet not all of this makes for “publicness” in a substantive sense. Diversification in education and the involvement of a greater number of “interested” parties exert a pull towards fragmentation (as Onderwijsraad, 2019, 2021 and Waslander, 2021: 27, observe for the Netherlands). And contributions to

“public” debate can also in effect be private interventions to further private interests. There is a danger that education is merely becoming an “accumulation of private interests” (Onderwijsraad, 2021: 8). The more education is seen exclusively as an investment in individual children, to increase their chances of success or happiness, and the more it is treated as a service provided to customers (the students or their parents; see Biesta 2005), the more it risks becoming a private rather than (also) a common good. This does not mean people will no longer expect the government to fund it – in fact, the argument that education is a fundamental right drives demands for public funding – but it will eat away at the sense that others have a say in a child’s educational investment or the contents of their education. In short, the idea that education is rightly a matter of public concern above and beyond public funding cannot be taken for granted, but is at risk in various ways.

At the same time, the devil is in the details. As mentioned in the previous section, while often viewed as detrimental to the “publicness” of education, private provision of education can, in specific contexts, coexist with or even be required for equal access and the enhancement of public educational functions. This means that careful monitoring of current developments is necessary to see how they play out in national, regional and cultural contexts; after all, they may considerably alter the educational landscape, with significant consequences for individuals, communities, and societies. In other words, it means that education everywhere must remain a matter of public concern.

Early on in the chapter, I suggested that we can think of abandoning the notion of education as a public good in favor of adopting the idea of education as a matter of public concern in terms of a tactical retreat. Securing a “better defensible position” enables us to survey the terrain to see how much of it we can recover. So how much can we recover, or how much have we already regained in virtue of this move? What was valuable about the idea of education as a public good was that it drew attention to public values such as justice, (collective) well-being and the public interest in maintaining a certain kind of society. All of these are also central to the idea of education as a public concern. What we have given up, apart from an ambiguous notion, is the *absolute* idea of state-provided education. Proponents of the idea of education as a public good were (and are) right to be concerned about the consequences of privatization, but their position lacks nuance and fails to do justice to context and the complexity of actual educational arrangements. Thinking of education as a matter of public concern allows us to do just that.

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10 Dimensions and Values: Towards a Descriptive Model and a Normative Framework for Assessing Public-Private Entanglement in Education

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Abstract

Over the past decades, education systems have undergone profound changes as private actors increasingly participate in what were once predominantly public responsibilities. This has led to the emergence of hybrid educational organizations in which public and private elements are deeply intertwined. Traditional binary distinctions between “public” and “private” are therefore no longer sufficient to understand contemporary educational practices. This chapter addresses this complexity through a twofold contribution. First, it develops a multidimensional descriptive model that maps how public-private entanglement manifests across different organizational dimensions, such as funding, regulation, authority, and control. By conceptualizing organizations as possessing unique “public-private profiles”, the model provides a nuanced tool for describing the varying degrees and forms of hybridity in education. Second, the chapter introduces a normative framework to evaluate the implications of these entanglements. Rather than relying on the broad and often ambiguous notion of “public values,” the authors distinguish between four categories of values: intrinsic values (centered on human flourishing), educational values (such as qualification, socialization, subjectification, accessibility, and teacher agency), legal values, and governance values (including transparency and accountability). This framework acknowledges the unique role of schools as autonomous pedagogical spaces with a specific societal mission. By combining descriptive and normative

perspectives, the chapter offers a comprehensive approach to understanding and assessing public-private entanglement in education. It highlights the need for multidisciplinary research and informed public debate to ensure that evolving educational arrangements continue to support core educational values in diverse and changing contexts.

10.1 Introduction

Over time, privatization in the public domain expanded, defined broadly as “a process through which private organizations and individuals participate increasingly and actively in a range of ... activities and responsibilities that traditionally have been the remit of the state” (Verger et al., 2016, p. 7). This process led to the blurring of boundaries of what we call “public” or “state-based” organizations on the one hand, and “private” or “market-based” organizations on the other hand. As a result, hybrid organizations emerged, which combine both public and private characteristics (Karré, 2023).

This development is reflected in education. Especially the past decade has witnessed an unprecedented growth in private sector participation in public education (e.g., Burch 2009, 2021; Verger et al., 2016). The chapters in this edited volume show how this increase in private sector participation has impacted many different organizational dimensions in education. The primary educational process of teaching is influenced by private sector participants in various forms: by market-driven teacher contracting standards (Cox & Goldring, 2026), the quasi-market structure for teaching and learning interventions (Prokic-Breuer et al., 2026), the integration of private supplementary tutoring within public education (Douma et al., 2026), and the marketization of school improvement support (März et al., 2026). At the same time, not only the primary process of teaching is impacted, but also funding arrangements (Villalobos et al., 2026) and governance dimensions (Litor, 2026).

As highlighted in the introduction of this volume (Camphuijsen et al., 2026), and as illuminated by the different chapter contributions, these processes of hybridization in schooling lead to two challenges. First, the classical idea of “public” and “private” elements as separate entities does not provide a plausible conceptual framework anymore for understanding these increasingly complex and multifaceted developments in education. Scholars have therefore concluded that we should “trade our administrative, dichotomous public/private distinction for a substantive, qualitative scale” (Higgins & Abowitz, 2011, p. 368) to acknowledge the “hybridization” of public and private education.

Second, in the wake of this increasing public-private entanglement, the concept of “publicness” in education is thus crucially shifting (Miron, 2008) and concerns have been expressed about whether these developments imply an erosion of the “publicness of education”. These challenges were at the heart of our call for contributions to this volume.

If we want to get a grip on schools as complex hybrid organizations, our first step is to gain insight into which *dimensions* of educational institutes are impacted by processes of public-private entanglement. Furthermore, we need to address the increasing unrest over the perceived detrimental effects of privatization on the publicness of education (Burch, 2009; Miron, 2008; Säfström & Biesta, 2023). In a second step, we therefore aim to understand which *values* are impacted by processes of hybridization, to support our normative assessment of this entanglement in light of education’s public role. These steps in researching public-private entanglement require a multidisciplinary approach, combining public management theory, empirical sociological and educational research, and educational philosophy.

This concluding chapter therefore offers a twofold contribution. First, by drawing on insights from organization science and public management (Bozeman, 1987, 2007; Perry & Rainey, 1988; Karré, 2011, 2020, 2023), we develop a multidimensional model that identifies the organizational dimensions through which public-private entanglement in education manifests. Insights from the empirically informed contributions to this volume (e.g., Litor, 2026; Villalobos et al., 2026; Prokic-Breuer et al., 2026; Cox & Goldring, 2026) inform and substantiate this model.

Second, we turn to educational philosophy and pedagogical thinking (Brighouse et al., 2018; Masschelein & Simons, 2013) to develop a value framework for evaluating the implications of hybridization for the publicness of education. Taking our cue from this research tradition, we understand schools not only as any other organization in the public sector but also as having an exceptional position in society: as an autonomous pedagogical sphere with its own specific values. Informed by the philosophically based contributions by Kloeg (2026), Douma et al. (2026), and Schinkel (2026), we will argue that it is helpful to understand the values that come into play to assess public-private entanglement in schooling as *intrinsic*, *educational*, *legal*, and *governance* values.

By combining a descriptive model with a normative framework, we acknowledge the dual nature of schools in our society: as organizations displaying dimensions of the public sector *in general*, and as value-laden institutes that provide the next generation with the capacities to flourish *specifically* (Brighouse, 2018). Moreover, by adopting a multidisciplinary approach that acknowledges this duality, we contribute to existing literature on publicness

and privatization in education, which has mostly been confined to disciplinary boundaries. By means of these two models, we aim to provide researchers, policy advisors, and educational practitioners tools to map, understand, and evaluate public-private entanglement in education.

This chapter is structured as follows. In section 10.2, we will begin with a review of dimensional thinking in public management theory (10.2.1). Based on the strengths and weaknesses of different existing dimensional models, we draw up our own dimensional model (10.2.2). In section 10.3, we turn to educational philosophy and normative theories on publicness. We begin by arguing the limits of the notion of “public values” (10.3.1), and contend that a list of specific intrinsic, educational, legal, and governance values is more helpful for the normative assessment of public-private entanglement. These values are then visualized in our value framework (10.3.2), which we illustrate by applying this framework to the case of the tutoring business in the Netherlands, drawn from Douma et al. (2026) in this volume (10.3.3). In section 10.4, we indicate how these processes of public-private entanglement always play out in broader societal, historical, and ideological contexts. Finally, we provide concluding remarks on the issue of methodology in section 10.5, in which we elaborate on the previously indicated need for a multidisciplinary approach in researching hybrid educational institutes.

10.2 A Dimensional Approach to Public-Private Entanglement in Education

10.2.1 Multidimensional Models to Describe Public-Private Characteristics: Contributions from Organization Science and Public Management

The space between state and market has long been debated, notably in the literature on hybrid organizations (Billis, 2010; Karré, 2023), public-private partnerships (Skelcher, 2005; Sullivan & Skelcher, 2002), state-owned enterprises (Bernier, Florio & Bance, 2020), public entrepreneurship, and the “third sector” (Anheier, 2005). In organization science and public management, scholars have reflected on this so-called “grand dichotomy” between state and market, proposing multidimensional frameworks to better analyze organizations that combine public and private characteristics (Benn & Gaus, 1983; Bozeman, 1987, 2007; Karré, 2011, 2020, 2023; Perry & Rainey 1988). The multidimensional models that are developed to analyze organizations that combine public and private features highlight dimensions such as ownership, funding, access, agency, interest, autonomy, and value orientation, showing

that organizations cannot be neatly classified as public or private but instead exhibit unique profiles that evolve over time. Benn and Gaus (1983), for example, argue that the distinction between public and private can be made along three dimensions:

- “Access”, referring to the openness of facilities, resources, or information. This dimension can be subdivided into physical access to spaces, access to activities and interactions, access to information, and access to resources.
- “Agency”, referring to whether an individual or organization acts independently or as an agent for the community.
- “Interest”, distinguishing whether benefits or losses are communal or restricted to individuals.

These dimensions are not domain-specific but, according to Benn and Gaus (1983), possess a certain universal applicability.

Similarly, Perry and Rainey (1988) identify three dimensions along which organizations may be more or less public or private: ownership, funding, and social control. The latter refers to polyarchy (“rule of the many”) or the market as a steering mechanism.

What Perry and Rainey (1988) refer to as “social control” is closely related to Bozeman’s concept of the *publicness grid*. Bozeman’s *All organizations are public: Bridging public and private organization theory* (1987) is one of the foundational texts in the tradition of dimensional thinking about the public-private distinction (for references to this tradition in this volume, see März et al., 2026 and Moschetti et al., 2026). In his 2013 article, he summarizes this theory as follows:

The central idea behind the dimensional publicness theory is that, rather than thinking of public and private organizations as distinctly different, differentiated by their respective sectors or legal status, it is often more useful to think of all organizations as being influenced by both external political authority and external economic authority (Bozeman, 1987). Political authority is usually but not always associated with government and private authority is usually but not always rooted in markets. The dimensional publicness model holds that public and private are dimensions, not dichotomies, and that much can be learned by knowing the particular mix of political and economic authority affecting organizations. According to the dimensional publicness model, some organizations are “more public” or “more private” than others.... (Bozeman, 2013, p. 182. See also: Bozeman, 1987, pp. 84-85; Bozeman, 2007, p. 18)

The combination of these axes yields a publicness grid on which all types of organizations can be plotted. Bozeman emphasizes that these axes are not sector bound but apply to *all* organizations (1987, p. 95). He further notes that organizations may score differently on the grid depending on a specific activity, making it problematic to assign a single position to the organization as a whole (1987, p. 145). In addition to this descriptive publicness grid, Bozeman developed a public value mapping model as a tool to assess which public values are served – or not served – by organizations with specific mixes of political and economic authority (2007, pp. 144-147). Importantly, he argues that disagreement over values that should be included in the model does not undermine the model's utility; rather, the model is primarily intended to raise issues and stimulate public debate about the desirability or undesirability of particular forms of public-private entanglement. This also means that the values embedded in the model themselves may become subject of discussion.

Karré (2011, 2020, 2023) also employs a multidimensional model to characterize organizations with both public and private features. His model can be seen as a further development and refinement of the multidimensional model developed by the Netherlands Court of Audit (2005, 2006). Initially, Karré (2011) identified ten dimensions: legal form, ownership, activities, funding, market environment, value orientation, strategic orientation, relationship with public principal, managerial autonomy, and executive autonomy. In a later publication (Karré, 2023), he reduced these to six: ownership, activities, funding, value orientation, strategic orientation, and autonomy, explaining that,

the earlier ten dimensions ... (in hindsight) could not be measured by degrees but rather were either/or choices.... Furthermore, two dimensions dealing with autonomy ('managerial autonomy' and 'executive autonomy') were merged as in hindsight differentiating between the two did not seem to be practical anymore. (Karré, 2023, p. 788)

On each dimension, an organization may be more or less public or private, resulting in a specific "thumbprint" (Karré, 2023) or public-private profile:

Thumbprints taken at different moments can be used to illustrate the development of an organization to more or less hybridity or to another form of hybridity and can serve as starting points for discussions on whether and how this has influenced its performance. (Karré, 2023, p. 783)

The public-private profile may change over time, altering both opportunities and risks. Karré focuses on financial, cultural, and political opportunities

and risks. Bozeman refers to this as normative publicness (2007, p. 18; cited in Moulton, 2009):

An approach to values analysis assuming that a knowledge of the mix of political and economic authority of institutions and policies is a prerequisite of understanding the potential of institutions and policies to achieve public values and to work toward public interest ideals.

This normative approach will be explored further in section 10.3.

Although these models differ in their emphasis, they share two important features that are central for our purposes. First, each model demonstrates that public-private entanglement is multidimensional rather than binary, requiring an approach that captures variation across several organizational dimensions. Second, each model offers valuable building blocks, but none provide a comprehensive framework suitable for analyzing the specific configurations found in contemporary education systems. To arrive at such a framework, it is necessary not only to consider insights from organization science and public management, but also to examine how the educational research field itself conceptualizes public-private relationships. The next section therefore turns to educational literature, showing what this body of work has already developed, what remains under-theorized, and how it complements the multidimensional approaches discussed above.

10.2.2 Applying Dimensional Thinking to the Domain of Education

The multidimensional models described above originated primarily in organization science and public management literature and have not yet been frequently applied in the educational domain. Traditional concepts such as privatization and marketization, however, fail to adequately capture the complexity of contemporary educational practices. These notions remain overly tied to the state-market dichotomy, whereas in practice, education is characterized by layered configurations of organizations and financial flows that combine public and private features (Ball, 2009; Ball & Youdell, 2008). Ball and Youdell (2008) demonstrate, for example, that these educational practices may involve the simultaneous presence of more or less endogenous privatization (schools becoming business-like or operating as businesses), combined with more or less exogenous privatization (bringing the private sector into public schools). This entanglement arises both from deliberate policy and from bottom-up institutional developments (Burch, 2009), requiring multidimen-

sional models to describe and interpret the varying degrees of “publicness” and “privateness”.

Within the educational literature, the need for frameworks that can capture the complexity of contemporary developments is increasingly acknowledged (e.g., Hogan & Thompspon, 2020; Zancajo et al., 2025). Simultaneously, efforts are undertaken to unpack the organizational dimensions that are being impacted by processes of privatization and public-private entanglement. A notable example is the work of Gutiérrez et al. (2023), who lean on dimensional thinking in their analysis of privatization in education. In their article “Comparing degrees of ‘publicness’ and ‘privateness’ in school systems,” they propose a conceptually broad-based measurement tool that will enable the description of the public/private features of schools. Their starting point are two observations from the literature: firstly, that the term “privatization” is typically used normatively, and secondly, that the focus tends to be on processes where education becomes more private. However, they argue that an “[a]nalysis of the extent to which different systems were really “public” in the first place tends to be overlooked and, in fact, many studies focus entirely on privatization trends in state systems, disregarding the elements of a country’s education system which are private in any case” (p. 503). Gutiérrez et al. (2023) continue to identify four broad dimensions of publicness-privateness at the school level:

- (1) Delivery, or who provides and regulates the school?
- (2) Access/inclusion, or who can go to the school?
- (3) Finance, or who pays for the education provided in the school?
- (4) Decision, or who determines what happens in the school?

The delivery and finance dimensions roughly correspond with the state-market dimensions, or the “political authority and economic authority” identified by Bozeman, which are dominant in public management, organization science, and political economy research traditions. Simultaneously, Gutiérrez et al. (2023) rightfully suggest that another body of literature needs to be added to such a framework, in order to fully understand the phenomenon of privatization in schools: that of educational studies. The access/inclusion and decision domains reflect the issues that they discerned as prominent in educational literature.

Their framework results in an index that is widely applicable in many countries using public data on school-level characteristics, in order to measure the level of public-privateness of different organizational landscapes, where the dimensions of what is publicness and privateness are seen as part of a continuum. Yet, even this model remains incomplete for our purposes. While it captures several relevant dimensions, it does not incorporate others that are

essential for understanding how contemporary educational organizations operate. For that reason, the next section proposes a multidimensional model that synthesizes the most relevant insights from both bodies of literature. By combining dimensions drawn from public management with those grounded in educational research, our model aims to more accurately describe the full range of public-private entanglements found in education today. Table 10.1 summarizes the different dimensional models we discussed above.

Table 10.1 Different multidimensional models of the public-private characteristics

Authors	Dimensions
Benn and Gaus (1983)	Access, Agency, Interest
Perry & Rainey (1988)	Ownership, Funding, Social control
Bozeman (1987, 2007)	Political authority, Economic authority
Karré (2011)	Legal form, Ownership, Activities, Funding, Market environment, Value orientation, Strategic orientation, Relationship with public principal, Managerial autonomy, Executive autonomy
Karré (2023)	Ownership, Activities, Funding, Value orientation, Strategic orientation, Autonomy
Gutiérrez et al. (2023)	Delivery, Access/Inclusion, Finance, Decision

10.2.3 Towards a Comprehensive Multidimensional Model to Describe Public-Private Entanglement in Education

Against this backdrop, we now turn to the development of our own model. The goal is not to replace existing typologies, but to integrate their most useful elements into a more comprehensive framework that reflects the organizational realities of education. Educational organizations can exhibit varying degrees of publicness and privateness across multiple dimensions, including those mentioned above in different models. Moving beyond the traditional dichotomy of public versus private (where public denotes government and private signifies market or privatization) facilitates a more accurate description of educational developments and organizational practices. The models discussed above overlap, and each model has its strengths and limitations. For example, in some models, the “access” dimension is absent, while in others the “value orientation” is lacking, even though both are essential for describing the degree of an organization’s “publicness” or “privateness.” To properly describe public-private entanglement in education, we need a model that combines characteristics of the models above.

Based on these models, we identify nine distinct dimensions. These constitute a synthesis of the dimensions derived from the typologies discussed above, with certain dimensions having been consolidated or relabeled, which we explain below in Table 10.2.

Table 10.2 A multidimensional public-private framework

	Dimension	Public – Private Typology
1	<i>Openness</i>	Accessible for a broader public and/or for specific individuals (e.g., data, spaces, information)
2	<i>Funding</i>	Provided by the government and/or through private contributions
3	<i>Political authority</i>	Degree of policy influence (not being regulation or funding)
4	<i>Economic authority</i>	Degree of marketization or competition
5	<i>Regulation</i>	Regulated by government and/or self-regulation
6	<i>Interests</i>	(Revenues) serving collective interests (e.g., societal impact) and/or organizational interests (e.g., profit maximization)
7	<i>Activities</i>	Statutory tasks and/or commercial activities by the educational organization
8	<i>Personnel</i>	Staff with legally guaranteed rights and obligations and/or staff without such guarantees
9	<i>Control</i>	The degree to which a commercial party or the school itself influences the content of educational provision or support services

The dimension “ownership”, which frequently recurs in the literature, has been omitted here, as it is effectively subsumed under the dimensions of funding, regulation, control, and political authority. The dimension “openness” corresponds to the dimension “access” as defined by Benn and Gaus (1983, see above), namely the openness of facilities, resources, or information – where greater openness signifies greater publicness, while the dimension “access”, as defined by Gutiérrez et al. in terms of inclusion, is incorporated into our normative assessment framework (see section 10.3), which includes sector-specific values. “Personnel”, by contrast, constitutes a distinct dimension – one not explicitly identified in the existing multidimensional models, but which may be understood as a form of endogenous privatization (Ball and Youdell, 2008). “Control” refers to the degree in which a commercial organization or the school itself influences the content of educational provision or support services. This dimension is a merger of the “authority” dimension of Karré (2023) and the “social control” dimension of Perry and Rainy (1988).

Depending on their positioning along these dimensions, educational institutes develop specific “public-private profiles.” For each dimension, the

following applies: the higher the score, the higher the degree of publicness. These profiles facilitate a comprehensive understanding of the multifaceted nature of educational organizations and their operational contexts. Visual representations of two hypothetical public-private profiles below (Figure 10.1) illustrate the diversity and complexity inherent in these configurations.

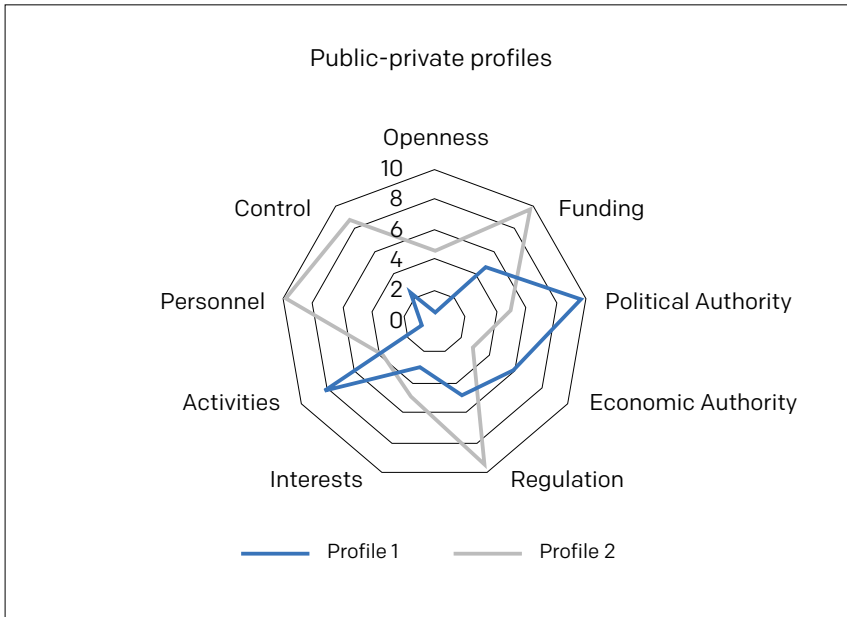


Figure 10.1 Public private profiles (example)

10.3 A Normative Approach to Public-Private Entanglement in Education

10.3.1 Publicness and Public Values

This edited volume intended to address two challenges: an analytical understanding of public-private constellations, and a normative evaluation of those constellations. After presenting our descriptive dimensional model, we now turn to the normative challenge. Scholars have expressed concerns about whether increasing private sector participation implies an erosion of the “publicness of education” (Burch, 2026; Säfström & Biesta, 2023), and of public goals and values, ranging from accountability to the community and the promotion of student autonomy (Feinberg et al., 2008), a sense of citizenship and solidarity (Giroux, 2000; Sandel, 2015), and educational justice and equal-

ity (Brighouse, 2003). The normative framework we will present below, which aims to address these concerns, fundamentally rests on two important premises. Firstly, we suggest that the notion of “public values” might unnecessarily complicate our normative assessment and therefore discern specific *types* of values, without organizing them under the notion of “publicness.” Secondly, we argue that schools should be understood as not only any other organization in the public sector, but also need to be treated as having an exceptional position in society: an autonomous sphere (Arendt, 1961; Masschelein & Simons, 2013; Walzer, 1983). The values that come into play to assess public-private entanglements in education should therefore specifically be *educational* values. The first premise is fleshed out below; we will turn to the second premise in section 10.3.2, after which we will draw up our value framework in 10.3.3.

The first premise, the complexity of the notion of “public values,” can be gathered from the many examples in this volume that challenge the assumption that public values are optimally safeguarded within publicly funded educational institutions or as part of government structures. While transparency and legitimacy are frequently regarded as core public values, some contributions demonstrate that, in certain political contexts, private actors may possess greater legitimacy according to stakeholders (e.g., see März et al., 2026). The same applies to the notion of bureaucracy (oftentimes associated with state-actors): Moschetti et al. (2026) show how bureaucracy becomes associated with neoliberal practices. Furthermore, the perceived lack of accountability in government-funded institutions once formed a stimulus for business-inspired techniques that were introduced in the public sector. In some contexts, it is currently precisely the lack of accountability of private sector partners in public education that scholars find worrisome (see for example Villalobos et al., 2026, on the role of philanthropic organizations in education). “Public values,” thus beg the question: “What makes these values *public*?” These findings are in line with the observation of Guttierrez et al. (2023) on the context-dependency of the notions of “public” and “private” in value assessments:

To take a simple example, Starr (1988) considers one concept of ‘public’ as visible (happening in public), contrasted with ‘private’ as meaning out of view. With this notion of what is public, policy technologies such as inspection and reporting of policies and results would ostensibly render schools more public. However, in many countries, these technologies have been introduced in order to facilitate the operation of school markets and would be deemed to be a feature of privatisation. (p. 502)

It is precisely this context-dependency of the notions of “public” and “private” that leads us to the conclusion that a normative assessment of publicness would gain more clarity if the broad concept of “public values” is specified into domain-specific groups of values. “Public values” are thus not automatically a result of organizations with a certain type of funding or regulation: they can be delivered by any organization, whether public or private (Moulton, 2009). We therefore propose to understand *publicness* in our model as a *descriptive* aspect in understanding the nature of organizations. The publicness of any organization is how it scores in the different dimensions we discerned – and publicness is therefore in our model not a *value judgment*, but a characterization of an organization, or a “thumbprint,” that may evolve over time.

10.3.2 A Value Framework for Assessing and Evaluating Public-Private Entanglement

With respect to our second premise, on the exceptional position of schools in our society, we take our cue from the contribution by Kloeg (2026) to this volume. He argues from the work of Hannah Arendt that education, politics and economy need to be understood as different spheres in society. We therefore conclude that a value framework to assess public-private constellations needs to take into account a set of *education-specific values* as well. As Arendt stated, school is the institute that “we interpose between the private domain of home and the world in order to make the transition from the family to the world possible at all. Attendance there is required not by the family but by the state, that is by the public world” (Arendt, 1961, pp. 188-189). Schools are, therefore, uniquely positioned in society; this is in line with what pedagogical thinkers such as Masschelein and Simons have argued (2013), but also what political philosopher Michael Walzer contended is his *Spheres of justice* (1983). We have equipped these schools with a specific task: introducing children into the public world – whilst schools are thus not *of* the public world themselves. Interestingly, we can argue from the work of Arendt and the contribution of Kloeg, that most “public schools” are public because they are organized according to a certain dimensional thumbprint (i.e., funding, regulation, etc.), and not because they are part of the public world of politics or economy. In short, a state can fund and regulate schools, but schools should not be instrumentalized for political purposes or economic gains. The goals of schooling need to be educational – and the values that come along with it as well.

Our value-framework is grounded on the idea that the fundamental or **intrinsic value of education** is human flourishing, as also argued in the contribution of Schinkel (2026) in this volume. Harry Brighouse et al. (2018) have

developed a model for decision-making in education, in which they explain this fundamental value as follows:

The fundamental value that underlies our discussion of educational goods is human flourishing. Educational goods help people's lives to go well—and what matters, ultimately, is the creation and distribution of opportunities for people to flourish. ... Rather than attempting to defend a particular view, we rely on reasonably (though not entirely) uncontroversial assumptions about some of the constituents and prerequisites of a flourishing life. (pp. 21-22)

Having established the intrinsic value of education as flourishing, we can now establish a threefold set of **educational values** that are geared towards creating opportunities for human flourishing. This means that students should be equipped with the capacity to find a place in the work field, to be able to function in a democracy and to be able to interact with others, and to gain a sense of personal autonomy. Bearing in mind the work of the Dutch educational philosopher Gert Biesta (2013), these capacities might be summarized as the idea that educational practices always operate in the three overlapping domains of *qualification*, *socialization*, and *subjectification*. Whilst this list is focused on classroom interactions and curricula, a second layer of educational values is related to educational opportunities, which need to be distributed fairly for every child to flourish. For example, if a school provides an enrichment program via a commercial actor for all students, one needs to consider which educational values are aimed for in that program, and who will profit from those values. If an enrichment program is geared towards training for tests (qualification) with students who score below average, and critical thinking and arts (socialization and subjectification) for high-scoring students, then these values are not divided equally. Even though there many different perspectives on issues of a fair distribution of educational opportunities to flourish (see Brighouse et al., 2018), we suggest the simple normative guideline here that schooling should be *accessible*, *affordable* and *inclusive*. If a school, for instance, enters into a contract with a provider of laptops and tablets that will be on offer below market prices for parents, it might be necessary to provide extra funding for parents who struggle to afford this in order to guard the educational values of accessibility and affordability. Finally, we propose a third layer in educational values from the perspective of teachers. They need to be equipped to function in this special educational space in society: they need *teacher agency* to allow them to utilize their professional expertise in issues of didactics and pedagogy to create opportunities for flourishing. These three layers together, inspired by the long-

standing tradition of the pedagogical triangle of teacher, student and content (see for example Friesen & Osguthorp, 2018) form the educational values in our normative framework.

Another important set of values is grounded in educational legal frameworks. These **legal values** might be established in international law, such as the right to education as part of the Universal Declaration of Human Rights, or the right to inclusive education as stated in the UN Convention on the Rights of Persons with Disabilities. Local legal frameworks come into play here as well, such as the Dutch constitutional right to the freedom of education or the legal prohibition on cross-subsidization.

Finally, values of *transparency* and *accountability*, oftentimes referred to as “public values,” are rightfully called upon in evaluations of private actor participation in the public sector. We propose to refer to these values as **governance values**, reserving “publicness” for the descriptive thumbprint, as argued earlier. Transparency and accountability together constitute a set of formal and informal practices through which a dialogue is established, both within the organization and between the organization and external actors (such as political authorities, parents, and students). To engage in such a dialogue, it is important that both the organization itself and external stakeholders have insight into the opportunities and risks associated with a specific public–private profile in relation to intrinsic values, educational values, and legal values.

We thus conceptualize accountability as a relational construct in which dialogue and the actions undertaken by both the actor and the forum in response to that dialogue are central. Transparency and accountability form part of a governance cycle aimed at safeguarding intrinsic values, educational values, and legal values. In this context, accountability is not understood as an activity that must yield a specific outcome (Verger and Parcerisa, 2017), such as improved learning outcomes, but rather as a practice that provides input for an ongoing dialogue about the extent to which intrinsic values, educational values, and legal values are secured. This relational approach to accountability therefore departs from the widely used definition proposed by Mark Bovens (2007, p. 450): “Accountability is a relationship between an actor and a forum, in which the actor has an obligation to explain and to justify his or her conduct, the forum can pose questions and pass judgement, and the actor may face consequences.” In Bovens’ definition, the relationship is more unidirectional: the forum requires the actor to account for their conduct, evaluates that conduct, and imposes measures with which the actor must comply. However, in a context where organizations operate with complex public–private profiles and must navigate trade-offs between different – sometimes conflicting – values, a

relational and more dialogue-oriented approach to accountability seems to be more appropriate.

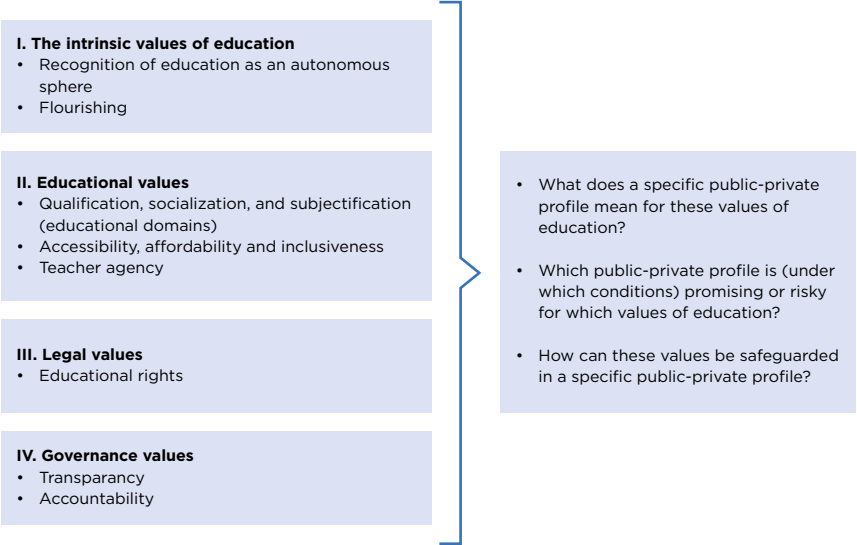


Figure 10.2 Value framework for evaluating public-private entanglement

Our normative framework as outlined above is visualized in Figure 10.2. In every chapter of this edited volume, one or more values are discussed from this normative value framework, as visualized in Table 10.3.

Table 10.3 Public-private entanglements and values

Chapter	Forms of entanglement	Values at stake
Villalobos et al.	Partnerships with private parties: - Philanthropic organizations - Commercial organizations	Accountability Transparency Teacher agency
Moschetti et al.	Privatization of education	Transparency
März et al.	Pedagogical advisory services	Teacher agency Qualification, socialization, subjectification
Litor	- Hybrid governance in education (public services are provided by various actors, including NGOs, PPPs and private organizations) - Different degrees of publicness	Accountability Legal values Accessibility Teacher agency Transparency
Douma et al.	Shadow education	Accessibility Qualification, socialization, subjectification
Schinkel	Education as a matter of public concern	Flourishing
Goldring & Cox	Non-permanent, temporary, and short-term contracts in public and private schools	Teacher agency
Prokic-Breuer et al.	Quasi-market structure of education system	Teacher agency Accessibility

10.3.3 Utilizing the Value Framework: an Example

The value framework in Figure 10.2 can be considered as a starting point for a normative discussion about practices of public-private entanglement and the possible impact on specific values. Working from the case of shadow education discussed by Douma et al. (2026) in this volume, we will illustrate how such an evaluation might take shape. Douma et al. (2026) showed how commercial providers of supplementary education increasingly find their way into schools in the Netherlands. Schools might contract these providers to offer their students tutoring or exam training at their location, for instance, to prevent that only

wealthier parents are able to afford such a service for their children. Sometimes, these contracts are the result of government funding, for example the temporary funding schools received in the Netherlands to address learning gaps following the COVID-19 pandemic. If we use the multi-dimensional model outlined in section 10.2.3 to describe this constellation, we can firstly draw up what might happen to the thumbprint of the school that enters into a contract with this company. On most dimensions, this collaboration does not alter the overall public thumbprint of that school. “Regulation”, “funding”, “authorities”: all remain in place within this constellation. The one dimension that might (but not necessarily) shift is that of “personnel”, as the composition of the members of staff changes by hiring tutors on a temporary contract.

The next step is to evaluate this constellation. Which values are impacted by such a collaboration between a school with a more public thumbprint and a provider of supplementary education with a more private thumbprint? If we assume that the collaboration does not infringe upon any rights, then **legal values** are not impacted. **Governance values**, in contrast, might be impacted in case of insufficient transparency and accountability regarding the costs and revenues of hiring this commercial provider. If this provider works in school and supports regular teachers in their job to prepare students for their exams, who in the end is accountable for the success of students – or failure? Who is responsible for the quality of the educational provision? And is the commercial provider accountable to shareholders, students, or a school board?

When we use the lens of **educational values**, one can argue on the one hand that contracting a commercial tutoring company could have a positive impact on the educational domain of qualification: the purpose of after-school tutoring is to make sure that students pass their exams. However: whether the intended positive impact on qualification is indeed achieved, is quite unsure—especially when this contract results in large groups of students taking part in exam trainings. As Douma (2026) already indicated: there is lack of consistent evidence for impact of shadow education on student outcomes. This lack of evidence indicates an important aspect of our value framework: assessing the impacted values oftentimes necessitates the use of empirical research. As Brighthouse et al. (2018) have argued: educational decision-making needs to be informed by both values and empirical evidence.

Another educational value that is impacted, is the value of accessibility. A collaboration with a commercial tutoring company could mean that every student might potentially benefit from this service, independent of the financial situation at home. Still, a concern might remain if we adhere to this principle: what if not all students are in the position to remain at school after classes? Are there perhaps students with caring responsibilities at home, or after-school

jobs to provide a necessary extra income? The value of accessibility therefore also implores further reflection and (empirical) research.

Other educational values might be impacted as well. Firstly, when schools focus more strongly on results and exam training, it might be at the cost of the educational domains of socialization and subjectification. Secondly, the educational value of teacher agency comes into play here as well. What does it mean when a school contracts tutors to provide exam training? Students might think that they need not pay attention during class, because they will receive training after regular school hours. The didactical approach or the pedagogical principles that teachers in a school adhere to, might also be set aside by tutors from “outside.” Depending on how much of a say teachers have in the after-school tutoring program, the value of teacher agency could potentially be strongly impacted.

The example above illustrates how our normative framework might be utilized in evaluating public-private constellations. It provides a necessary value-based lens to complement the dimensional framework, which maps the (empirically informed) “thumbprint” of such a hybrid constellation. The collaboration between a public school and a private tutoring business in this example leads to only small changes in the thumbprint of the public school. However, the repercussions from a normative perspective might be substantial and even reason to discontinue the collaboration if, for example, teacher agency is given prominence in the weighing of values. This example also illustrates one other important aspect of our normative framework, as we indicated earlier: understanding these public-private constellations from the perspective of different values, will result in a return to empirically informed research, for example on the effects of certain changes in the classroom. The back-and-forth between philosophical understanding and empirical research is precisely what we propose for understanding and evaluating public-private entanglement in education. We will return to this methodological perspective in our concluding remarks.

10.4 Contexts and Drivers

Public-private profiles are subject to continuous evolution (Camp-huijsen et al., 2026). Changes in one or more dimensions can alter the overall profile, influencing opportunities and risks associated with achieving educational values. A reduction in public funding may, for example, compel educational institutes to seek alternative revenue sources, potentially leading to increased tuition fees. Such shifts can pose risks to affordability and

accessibility and may also diminish the willingness to collaborate for collective educational goals, as institutes prioritize self-preservation. This, in turn, can lead to changes in interests, which over time might hinder the addressing of complex educational challenges that require cooperation, such as special needs education. Moschetti et al. (2026), in this volume, concisely summarize this point when they “challenge the assumption that publicness inherently implies direct state control, instead emphasizing the dynamic interplay of authority, market forces, and negotiated values that define what constitutes ‘publicness’ across different times and settings” (p. 83).

The example of increased tuition fees illustrates the interconnectedness of different dimensions and how changes can have reinforcing or mitigating effects. The specific forms that public-private entanglements take – and consequently the profiles that emerge – depend heavily on the *political, economic, historical, institutional* and other *contextual factors*, as well as the *drivers* active within those contexts (Verger et al., 2016; Burch, 2009; Bulkley & Burch, 2011; Lubienski & Malin, 2025). Several drivers and contextual factors are addressed in various contributions within this book. Moschetti et al. (2026) describe how private interests impact educational policy, potentially undermining public control and accountability, März et al. (2026) observe that neoliberal reforms facilitate the entry of private actors into public education, creating a competitive, hybrid ecosystem, and Goldring and Cox (2026) analyze the implications of expanding temporary contracts on workforce stability, educational quality, and policy considerations.

One specific driver is worth mentioning here as a final example. Villalobos et al. (2026) highlight how entrepreneurial activities in education can transform crises into business opportunities. This observation is in line with Ideland et al. (2021), who showed that a growing apparatus of edupreneurial actors in Sweden offer solutions for “school crises” and how these commercial actors become taken for granted in the public school system. Ideland et al. (2021) rightfully contend how these developments can be perceived as a form of problematic “solutionism”: “the commodification of crises into problems to be solved” (p. 84). März et al. (2026) point out an interesting aspect of this solutionism: external pedagogical advisors in Flanders need to remain “neutral” in order to increase their range and their position in the market, which leads to “a market of universal or standardized solutions for nevertheless complex and situated problems that are hard to disconnect from the school identity and specific pedagogical projects” (p. 171). Within a neoliberal discourse, private-sector actors are positioned as efficient responders to state failure in education: state actors are framed as bureaucratic and static, whilst the private sector is perceived as flexible, adaptable and capable of addressing acute problems. Crisis narratives

can therefore be adopted, or even actively created, by private actors – who can not only decide what a crisis is in education, but also come up with a (standardized) solution. This indicates that private actors are not passively positioned in, but actively shaping public-private constellations, for example by utilizing crises narratives to strategically further their interests (see also Bulkley & Burch, 2011).

10.5 Concluding Remarks

In this chapter, we introduced the concept of “public-private profiles” to accurately describe the complex landscape of education, where public and private elements are intricately intertwined, depending on specific policy, economic, institutional or historical contexts and drivers. We proposed that the terms “public” and “private” refer to the *description* of different dimensions – such as funding, regulation, authority or activities – that together form a specific thumbprint for any organization, including schools. To plot these different dimensions that constitute a public-private thumbprint, we developed a **multidimensional model to describe public-private entanglement in education** in section 10.2.3. To facilitate the *evaluation* of these practices, we developed a **value framework for evaluating public-private entanglement in education** in section 10.3.2. With this value framework for assessing public-private entanglement, we emphasize the importance of a broad range of values for appreciating and evaluating forms of public-private entanglement: the intrinsic value of education, educational values, legal values, and governance values. The combination of a descriptive and evaluative model can therefore be understood as a first step to answer the call by März et al. (2026) in this volume, when they suggest that future research should

try to discuss these hybrids in depth and perhaps to begin by developing a new and adequate vocabulary to give them a proper name. Equally important will be to raise the question arising from the new ecology concerning what the role of education is about and whether we, in this new environment, want to continue to value in education what we used to protect and defend by making it “public”. (p. 177)

To map, understand, and evaluate public-private entanglement requires a multidisciplinary approach and an opening up of a conversation between educational researchers, public management theorists, economists, sociologists, and educational philosophers, where current conversations oftentimes remain

within disciplinary boundaries. Our volume is, first of all, a call for breaking down disciplinary barriers and engaging in such conversations to further multidisciplinary research in public-private constellations.

From different disciplinary lenses, the chapters in this volume explore various forms of public-private entanglement, with particular emphasis on privatization, market mechanisms, and partnerships. These chapters not only describe these forms but also evaluate their implications. The contributions highlight different values that have informed our normative framework, such as teacher agency, accessibility, and transparency (see Table 10.3). It is important to stress that our multidimensional model and value framework are meant as a starting point for further additions and adaptations: future research is necessary to establish if this model adequately maps all relevant dimensions of public-private constellations, and if the values we discerned are sufficiently capable of providing a framework for a normative assessment. Not only the model itself, but also the possible correlations between dimensions and values in this model necessitate further research. Are there certain dimensional combinations that form a specific type of constellation that will impact certain values? Can we draw up specific public-private profiles that are promising in safeguarding educational values? Our preliminary conclusion indicates that, from the authors' perspectives in this volume, public-private entanglement is primarily viewed as a threat or risk to educational values. Despite the fact that März et al. (2026, p. 171), for example, discern how schools "rediscover their own policymaking capacity" when a market of pedagogical advisors emerged, they formulate concerns about the impact on sustainable school improvement and the obscuring of who and what will be defining our future schools and curricula – in terms of our framework: about the values of teacher agency and accountability. With these and similar concerns, the contributions to this book tend to focus on regulation, support, and policy interventions to navigate the risks of public-private constellations. This volume has shown how such constellations always emerge within a specific context, so effective regulation, support, and policy measures can only address these concerns comprehensively if such measures are appropriate to the national and local context and if the underlying drivers are also targeted.

We argued earlier that most "public schools" are public because they are organized according to a certain dimensional thumbprint (i.e., funding, regulation, etc.). With our reconfiguration of "publicness" as a descriptive term that indicates a certain dimensional thumbprint that we can find also in other types of organizations, we discarded the concept of "public values" in our normative framework and argued for types of values geared towards assessing the

school as a specific educational organization that provides the next generation with capacities to flourish. This understanding of education implies that we are in line with the contribution of Schinkel (2026) to this volume, who argues for education as a “public concern,” just as a democracy is a common “project” rather than a given. A careful monitoring of educational values to maintain a certain kind of society should be part of a public conversation. In other words, we discarded the notion of “public values” but maintain that educational values should be a public concern. A similar call was made by educational philosophers Masschelein and Simons in their work *In defence of the school. A public issue* (2013):

Our formulation is quite simple in this regard: the school is a historical invention, and can therefore disappear. But this also means that the school can be reinvented, and that is precisely what we see as our challenge and, as we will hopefully make clear, concrete ways in today’s world to provide ‘free time’ and to gather young people around a ‘common thing’, that is, something appearing in the world that is made available to a new generation. For us, the future of the school is a public issue—or rather, with this apology, we want to make it a public issue. (p. 10)

Public–private constellations in education confront us with complex phenomena, that are difficult to untangle. Even more so: oftentimes, these constellations are hidden from the public eye, which makes them even harder to address (Burch, 2009). Despite these difficulties, our volume is also a call for turning this educational hybridity into an object of public scrutiny and debate, and thereby making it a public issue.

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Hybrid school organizations, which combine public and private features, have become increasingly common in contemporary education. This shift raises concerns about whether we are witnessing a potential erosion of the public character of education.

This edited volume advances *public-private entanglement* as a conceptual lens to study these developments in an effort to gain a more thorough understanding of schools as complex hybrid organizations and of what is being transformed – or lost – as public and private features become more tightly interwoven.

The different chapters in the volume offer conceptual tools, empirical examinations, and normative evaluations. In doing so, they move beyond the increasingly inadequate dichotomy of “public” versus “private”, foster cross-disciplinary dialogue, and provide insight into the drivers, logics and consequences of public-private configurations across varied educational systems.

The volume culminates in two integrative frameworks: a multidimensional model that identifies the organizational dimensions affected by public-private entanglement, and a value framework for assessing and evaluating public-private entanglement in education. By means of these two models, the volume aims to provide researchers, policy advisors, and educational practitioners tools to map, understand, and evaluate public-private entanglement in education.

“This is important work in a post-neoliberal context in which the very idea of a public sector is under attack.” – Patricia Burch, Professor

of Education, University of Southern California

