

© Adrián Zancajo, Clara Fontdevila, Huriya Jabbar and Antoni Verger 2025

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Published by
Edward Elgar Publishing Limited
The Lypiatts
15 Lansdown Road
Cheltenham
Glos GL50 2JA
UK

Edward Elgar Publishing, Inc.
William Pratt House
9 Dewey Court
Northampton
Massachusetts 01060
USA

Authorised representative in the EU for GPSR queries only: Easy Access System Europe –
Mustamäe tee 50, 10621 Tallinn, Estonia, gpsr.requests@easproject.com

A catalogue record for this book
is available from the British Library

Library of Congress Control Number: 2024951205

This book is available electronically in the **Elgaronline**
Sociology, Social Policy and Education subject collection
<https://doi.org/10.4337/9781035311385>

ISBN 978 1 0353 1137 8 (cased)
ISBN 978 1 0353 1138 5 (eBook)

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1. Education privatization and marketization: new spaces and research directions

Adrián Zancajo, Clara Fontdevila, Antoni Verger and Huriya Jabbar

Education privatization and marketization are becoming increasingly complex and plural phenomena. Analysing the extent and ways these phenomena have expanded across countries has grown urgent and challenging. Not only are market arrangements making inroads into new territories, but they are also continuously transforming in settings where privatization or marketization have been established for decades. The growing plurality of forms and contexts of privatization and marketization is relevant because it reflects the variety of rationales, forces and goals involved. It is also significant because different policy configurations motivate different responses from educational stakeholders who are directly or indirectly impacted by them, thus affecting their ultimate outcomes.

While academic and policy debates around education privatization and marketization have proliferated in recent decades, conceptual and analytical frameworks have not always kept pace with the ever more diverse nature of these phenomena. Scholarship often oscillates between broad categories that encompass a range of policy designs and particularistic approaches that focus on local specificities. Yet, there is something to be gained from charting a middle way between these tendencies. This approach would allow us to make sense of the increasing heterogeneity of these phenomena while avoiding sweeping generalizations. Indeed, the growing complexity and diversity of education privatization and marketization make it necessary to revisit conceptual, analytical and methodological frameworks underpinning this field of research.¹ In light of this, this introductory chapter presents and analyses some of the current research gaps and challenges the *Handbook* aims to address.

1. DEFINING AND MEASURING EDUCATION PRIVATIZATION AND MARKETIZATION

1.1 Privatization and Marketization: Conceptual Framework

In education studies,² the terms ‘privatization’ and ‘marketization’ are often used interchangeably and even treated as synonymous (Hogan & Thompson, 2017). This is because the two phenomena are related at the policy level, and often part of the same arrangements, or driven by similar political agendas. However, from an analytical point of view, distinguishing between them can enhance our understanding of the processes that lead to their adoption, their impact on educational actors’ behaviours and practices, and their aggregated effects. In their seminal article, Geoff Whitty and Sally Power already highlighted the need to treat privatization and marketization as separate concepts for heuristic purposes:

[...] while such terms [marketization and privatization] are clearly politically embedded, exploration of their constituent elements and distinctive features provides a useful framework to analyze the scale and nature of welfare restructuring. (Whitty & Power, 2000: 94)

In its most basic terms, privatization can be defined as the involvement of private actors, rather than the State or other public bodies, in any domain of the educational service. While these domains include regulation and governance, the most scrutinized of them are provision and funding. Unlike sectors such as energy, telecommunications, or railways, education privatization rarely involves transferring assets from public to private hands (Lubienski, 2006a). Instead, in education, privatization frequently occurs through private actors' participation in providing or funding educational services. In terms of provision, the involvement of private actors usually takes place through educational institutions managed by non-State actors, from private companies to faith-based organizations or foundations. In the case of funding, privatization manifests in the rising weight of household spending on education, as well as in the increasing role of companies, sponsors and philanthropic organizations in contributing economic resources. Nonetheless, education privatization does not always shift provision and funding responsibilities from the public sphere to the private one. Instead, hybrid arrangements, such as public–private partnerships (PPPs) or subsidization schemes, which involve private actors in educational provision while the State remains the main funder, play an important role in many countries (Patrinos et al., 2009; Gingrich, 2011).

Marketization, in turn, can be defined as the adoption of user choice and provider competition as central coordination tenets between education demand and supply (Dupriez & Maroy, 2003; Gingrich, 2011). This broad conceptualization renders it challenging to define the specific policy arrangements fostering marketization. To Lubienski (2006a), the education market is essentially a metaphor for a set of policies aimed at increasing choice and competition in educational systems to mimic market dynamics. For instance, providing families with more choice can manifest in various policy interventions, from open-enrolment schemes within the public education sector to public subsidies for attending private schools. Beyond choice and competition, marketization in education is often associated with two other policy developments. One is the decentralization of school governance, which involves transferring management responsibilities from large bureaucracies to local or district-level organizations. The other is deregulation, granting greater autonomy to education service providers, whether public or private (Lubienski, 2009).

Over the past 15 years, the influential work of Stephen Ball and Deborah Youdell (2008) has been used by numerous authors to differentiate the phenomena and policies related to privatization and marketization processes. Given its relevance, it is worth contrasting their widely-circulated conceptual framework with the definitions provided above, attending to similarities and differences. Drawing on Hatcher & Hirtt (1999), Ball and Youdell view both processes as manifestations of privatization, distinguishing between exogenous and endogenous types. According to the authors, exogenous privatization consists of the 'opening up of public education services to private sector participation' (p. 14), which can be assimilated with the definition of privatization provided above. In contrast, endogenous privatization, as defined by Ball and Youdell, is much more related to marketization. Endogenous privatization involves promoting private sector 'ideas, techniques and practices' in the public sector. This can involve the adoption of quasi-market arrangements, characterized by users' choice and competition between providers, but also New Public Management (NPM) policies such as

school autonomy or results-based performance (Gunter & Forrester, 2009; Verger & Curran, 2014). In line with this, Lubienski (2006a) argues that marketization implicitly involves privatization by changing the nature of the educational good and transferring decision mechanisms from a bureaucratic logic to individuals. The opposite can also be true, as introducing private operators into school systems often encourages competitive behaviours among both private and public providers.

As such accounts suggest, privatization and marketization are closely intertwined phenomena. However, the conceptual distinction between them offers important analytical benefits. For instance, the distinction helps in determining the ultimate impacts of related policies and understanding the mechanisms connecting these arrangements to specific education outcomes. Although empirically disentangling the effects of privatization from those of marketization is challenging, emerging evidence suggests they have differential effects (Wejryd, 2023).

Beyond heuristic purposes, distinguishing privatization from marketization is important because their combination leads to different system-level configurations. This distinction allows for the characterization of various education systems shaped by different policies (Figure 1.1). In terms of policy reforms, the most common shift has been from bureaucratic systems, where the State is the leading provider and funder of the education system (cell 4), to systems where both private and State providers coexist, allowing users to choose providers and promoting competition among them (cell 1). This combination of privatization and marketization results in what is known as education quasi-markets (Le Grand & Bartlett, 1993). Such reforms, widely adopted since the 1980s under the auspices of neoliberalism, are well documented in contexts like Chile and England. Similar policy arrangements can also be found in what Vandenberghe (1999) denominates *old* quasi-markets – countries such as the Netherlands and Belgium, where the subsidization of private provision and the capacity of

		Privatization	
		Yes	No
Marketization	Yes	Quasi-market (1)	Market mechanisms within the public sector (2)
	No	Contracted-out providers (3)	Bureaucratic system of provision and funding (4)

Source: Authors' own elaboration.

Figure 1.1 Modes of privatization and marketization in the education sector

families to choose schools were adopted much longer ago to solve a conflict between the State and religious denominations (Ansell & Lindvall, 2021).

While quasi-markets are among the system-level configurations that have attracted the most attention, other combinations of privatisation and marketisation can be observed. In the education sector, it is possible to promote market mechanisms without the involvement of private providers (cell 2). Many open-enrolment schemes in the US and the reforms adopted in New Zealand in the late 1980s (Lauder et al., 1999; Fiske & Ladd, 2000) fall within this category, thus being an instance of marketization without privatization. Finally, as in many other social sectors, private actors can become providers without necessarily adopting market mechanisms (cell 3). While this last option is less frequent in the education sector, it is usually the option adopted for other ancillary services such as school meals, transportation and cleaning services.

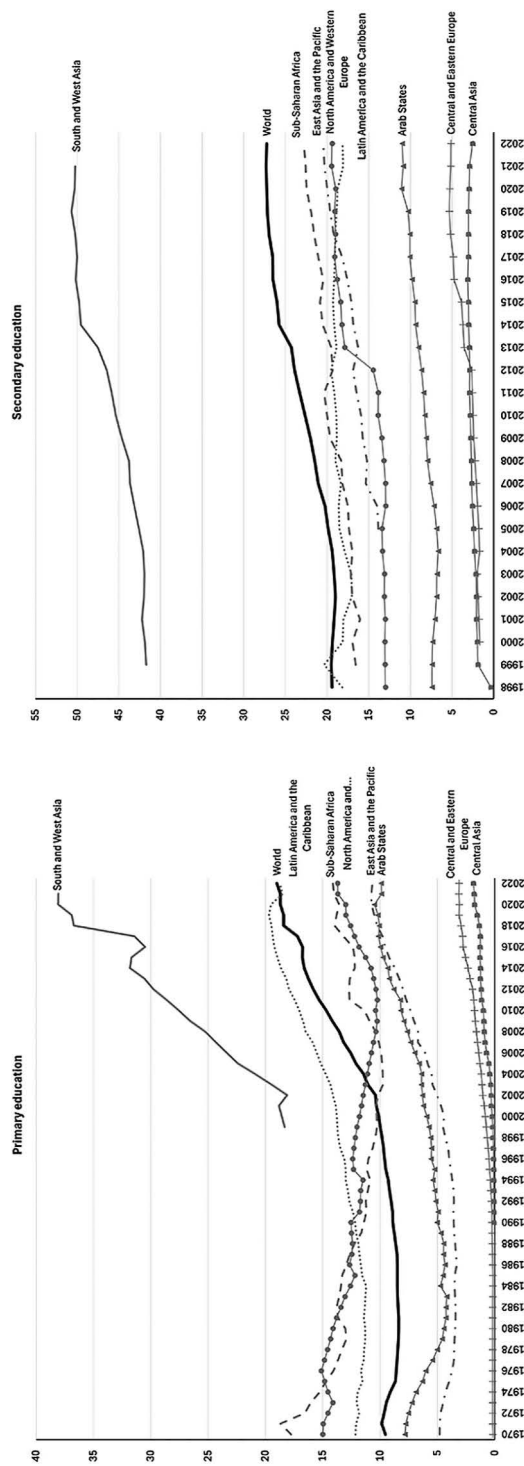
Figure 1.1 captures privatization and marketization resulting from public policies. However, similar outcomes can also emerge from a lack of public action, thus adding another layer of complexity. While private independent education (privately managed and funded) has been present in most countries of the Global North and South for many centuries, usually serving elite economic groups, many countries in the Global South have experienced a dramatic increase in independent provision serving lower-income groups in the last 25 years, due to State passiveness in attending to an increasing educational demand. We will examine this dynamic in more detail in the next section.

1.2 The Role and Relevance of Privatization and Marketization in Education

Assessing the extent to which education privatization and marketization have expanded in the past decades remains a research challenge for two main reasons. First, as mentioned above, there is no clear and universally accepted definition of these phenomena. The diversity of conceptual definitions usually leads to the use of different indicators when operationalizing them, which can yield different interpretations. Second, even under a common definition, the increasing complexity of privatization and marketization policies, as well as their diverse forms, makes it challenging to determine simple and common indicators to measure their evolution and expansion (Winchip et al., 2019).

In the case of privatization, enrolment in private institutions has been the most commonly used measure to track the evolution and relevance of this phenomenon (UNESCO, 2021). However, national definitions of private education institutions vary significantly, especially when these institutions receive substantial public funding. In some countries, privately managed schools mostly funded by public sources are classified as public, while in others, the degree of regulatory oversight determines classification. Additionally, in many countries of the Global South, the dramatic increase in low-fee private schools (LFPSs) over the past two decades has often gone unregistered (Härmä, 2021), leaving them out of official statistics.

Despite these limitations, international statistics show an increase in the percentage of primary and secondary students enrolled in private institutions across most world regions over the last decades (Figure 1.2). Privatization has followed different trends and achieved diverse levels of intensity in different world regions, yet common patterns emerge. For instance, in primary education, most world regions saw a decline in private enrolment during the 1970s, but since the mid-1980s private enrolment grown steadily in most regions until now. In Central Asia, Central and Eastern Europe, and Sub-Saharan Africa, the private-school expansion



Source: UNESCO Institute for Statistics.

Figure 1.2 Enrolment in private institutions by education level and world region

began in the 2000s. For secondary education, although data is more limited in terms of time span, an increase in private enrolment is evident in nearly all regions since the late 1990s, except Central Asia.

Globally, private enrolment in primary education increased from 8.9 per cent in 1990 to 18.6 per cent in 2019, and in secondary education from 19.2 per cent in 1998 to 26.9 per cent in 2019 (UNESCO, 2021). However, these global and regional trends mask significant variations among countries, not only in the share of private enrolment but also in the configuration of private provision. The latter includes differences in the proportion of independent vs dependent private schools, types of private providers (e.g. faith-based organizations, private companies, non-governmental organizations), and the regulatory frameworks under which they operate. Hence, while the relevance of private education provision is well established, variation within and across regions concerning different aspects begs for further interrogation as to the drivers and impacts of such common trends.

Capturing the evolution of marketization trends is even more complex. Even when focusing on its core components, choice and competition, the identification of indicators for cross-national comparisons poses important conceptual and measurement challenges. PISA (Programme for International Student Assessment) data provides some insights into the evolution of pro-market policies, particularly in Western countries. For instance, between 2000 and 2015, the role of residence in students' school allocation decreased in many countries, which can be considered an indicator that policies providing families with more capacity of choice have expanded (OECD [Organisation for Economic Co-operation and Development], 2019). This is in line with Musset's analysis of regulatory provisions in OECD countries, which notes that, since the end of the 1980s, 'more than two-thirds of OECD countries have increased school choice' (Musset, 2012: 4). However, the same PISA data indicates that the expansion of school choice policies has not translated into a significant increase in school competition. Between 2006 and 2018, the percentage of students enrolled in schools where principals reported competing with two or more schools in the same area increased by a mere four percentage points (OECD, 2020).

Research in different contexts has shown that the intensity of privatization and marketization is not only influenced by national or subnational regulations and policies, but also varies significantly across local contexts. This local variation is particularly relevant for market education policies as it shapes their aggregated outcomes. As several authors have noted, local education markets can differ greatly in terms of the degree of competition between schools and families' capacity to choose (Maroy, 2004; Lubienski, 2006b). Attending to such challenges, Gutiérrez et al. (2023) have recently developed an index to quantify the intensity of privatization and marketization in different local spaces within the same jurisdiction and under the same regulatory framework. Their study shows promising results in distinguishing levels of marketization among local spaces in Santiago de Chile and London. This localized measurement approach holds great potential for assessing the evolution of marketization and exploring its effects and impacts.

2. MARKETIZATION AND PRIVATIZATION AS PLURALISING PHENOMENA

Grappling with the increasingly diverse manifestations of privatization and marketization, as well as the specificities of new and emerging trends, remains an important task. In educational research, the predominant understanding of privatization and marketization is shaped by the study of a relatively narrow subset of educational systems. Countries like the US, Australia and the UK, but also Chile, Belgium and the Netherlands, have consistently attracted scholarly attention – as attested by the recurrent discussion of these cases in compendium works and seminal contributions (Belfield & Levin, 2002; Ball & Youdell, 2008; Edwards & Whitty, 1992; Koinzer et al., 2017; Lubienski, 2009, Whitty & Power, 2000, Vandenberghe, 1999). Such focus is partially warranted. These countries exhibit extraordinary shares of private enrolment or have experienced particularly drastic processes of marketization, thus operating as a magnifying lens – Chile being a case in point. Likewise, the disruptive impact of privatization policies, even when targeted or restricted in scope, may explain the intense debate around these policies in countries with a limited tradition of private education provision. This is, for instance, the case of the US, where the irruption of voucher proposals and open-enrolment schemes has clashed with a strong common-school legacy.

The corpus of research inspired by these cases has been instrumental in shaping the field of privatization and marketization studies, laying its analytical foundations and generating hypotheses. However, the pluralizing and globalizing nature of marketization and privatization has resulted in a more complex object of research. Specifically, we identify two critical areas that merit attention: first, the emergence of new modalities of privatization and marketization (including new policies but also new modes of delivery), often associated with the expansion of privatization into new sectors or contexts. Second, the existence of well-entrenched forms of privatization and marketization that have tended to elude scholarly attention – sometimes precisely as a result of their deep roots, which confer them a taken-for-granted quality.

2.1 What's New: Emerging Modalities of Privatization and Marketization

Recent years have seen the emergence of new policy schemes that do not fit neatly in the conventional policy categories associated with privatization and marketization reforms, and for which there is little to no precedent in the education field. An example of such developments is found in policy options relying on fiscal instruments. While confined to a limited number of countries, such schemes are qualitatively different from most privatization arrangements in place. This is so because rather than directly supporting the private provision of education through the allocation of public funding, they rely on tax-related instruments to support the purchase of private services, hence constituting an instance of ‘fiscal welfare’ (Morel et al., 2016). Various defined, the notion of fiscal welfare encompasses a number of tax-related instruments expected to perform a policy function while encouraging private provision (Sinfield, 2018). Given the limited traction of fiscal welfare measures in the education field,³ the advent and spread of tax credit education scholarship programmes, tax deductions and education savings accounts in the US, and their expansion to include more eligible recipients, represents a key development (Hackett, 2019; see also Borwein et al., 2023, for a discussion of recent trends in Canada).⁴

Despite their restricted scope, the significance of these emerging trends should not be understated. The political, social and educational dynamics they set in motion differ from those generated by more conventional forms of privatization and marketization. These policy changes are comparatively less visible to the general public, being portrayed by some scholars as instances of the ‘delegated welfare state’ (cf. Morgan & Campbell, 2011) or the ‘submerged state’ (Mettler, 2009). These low levels of visibility can insulate fiscal welfare policies from public and political accountability mechanisms, blurring responsibility lines and complicating regulatory scrutiny. Their low profile also facilitates catering to other social groups (e.g. better-off social strata) and accommodating new discourses (e.g. less emphatic on the redistribution of educational opportunity), thus reaching new beneficiaries and reshaping political alliances.

In recent years, new forms of private delivery have also emerged, often paralleled by some form of policy innovation. The rise and evolution of home-schooling, which has experienced important growth in the US over the last three decades, would be a case in point (Jolly & Matthews, 2018). This growth is arguably linked to the expansion of school choice options, although some dispute such causal connections (cf. Kunzman, 2019 for an overview). However, it is becoming increasingly evident that home-schooling practices have reshaped (and are reshaped by) a shifting school choice landscape and changes in the regulatory environment, including the advent of virtual and home-school charter schools (Huerta et al., 2006; Mann, 2017).

In the Global South, the proliferation of (largely unaided) private schools catering to poor segments of the population, loosely grouped under the term ‘low-fee private schools’ (LFPSs), is another relatively recent phenomenon whose relevance can hardly be overstated. Particularly in urban areas, this modality of private provision has experienced a rapid rise, with LFPSs representing an increasingly important share of domestic education markets. As documented by Bennell (2024), over 40 per cent of children in sub-Saharan Africa’s capitals and major conurbations are enrolled in private schools. This growing private sector, in turn, has led some donors and development partners to experiment with various regulatory interventions oriented at addressing and preventing market failures and ensuring compliance with minimal standards (Härmä, 2019; Baum et al., 2018). However, with a few notable exceptions, research into the political economy and evolution of such policies is limited. Much of the debate thus focuses on the merits and drawbacks of such regulatory efforts and their relative effectiveness – whereas less is known about the conditions leading to their emergence and shaping their implementation.

2.2 What’s Missing: The Origins of Market-Like Arrangements

Far from being a recent phenomenon, the role of the private sector in the provision of education has a long history, and so does the allocation of public subsidies to private providers (Archer, 2013; Neave, 1985). In numerous Western European countries, private providers have consistently played a central role in delivering or managing various services, including education (Gingrich, 2011), and most subsidization schemes have been deployed over a *pre-existing* network of private providers (Ansell & Lindvall, 2021). These patterns indicate that private education provision often predates and is not necessarily coupled with marketization policies. Overall, these trends suggest that the centrality of the State in education matters follows

complex and historically rooted dynamics, and is not merely a function of welfare-state traditions or contemporary marketization trends.

However, within the field of educational studies, numerous accounts of privatization trends have tended to focus on relatively recent developments and to concede great explanatory power to the ascendancy of neoliberalism and ‘free market ideology’ (e.g. Adamson et al., 2016; Ball, 2012; Burch, 2009; Sahlberg, 2016). The emphasis on such factors is well substantiated, as some of the most drastic instances of (or attempts at) privatization are indeed driven by neoliberal principles. In Chile, the introduction of various market mechanisms, including a voucher system, was explicitly informed by monetarist and public choice theory principles (Gauri, 1998; Cox, 2003). Likewise, Friedman’s ideas were routinely invoked by some of the early proponents of voucher programmes in the US (Belfield & Levin, 2005). Yet, once again, the focus on a handful of countries (and the variables that proved determinant in such contexts) comes at a cost. It may inadvertently neglect other important drivers or obscure the fact that there are multiple forces at play.

This is certainly the case with so-called ‘old’ education quasi-markets, as well as countries where market features, including public subsidies for private schools and school choice arrangements, are structurally embedded and date back to the constitution of modern education systems. For instance, while school choice schemes are integral to many European education systems (Agasisti et al., 2023), there is limited understanding of the conditions that lead to their emergence and institutionalization. Likewise, the origins of private provision in the Global South tend to be overlooked. Mainstream accounts routinely point to the impact of PPP schemes and the recent proliferation of LFPSs (Steiner-Khamis & Draxler, 2018; Robertson et al., 2012; Verger et al., 2016). However, there is still limited understanding of pre-existing modalities of private delivery, as well as the impact of historical legacies, including colonial administration, missionary education and state-building efforts in the post-independence period (cf. Wietzke, 2014; MacLean, 2017; Bazzi et al., 2020; Read, 2022).

To be sure, some of the emerging trends and underexplored cases mentioned above have been the focus of research efforts that have significantly contributed to policy and academic debates. However, despite their richness, this literature has received limited attention within educational research circles and appears to insufficiently inform prevalent understandings of the drivers and impacts of education markets. This *Handbook* is premised on the idea that attention to such cases might allow for and encourage a more refined understanding of education privatization and marketization. Accordingly, the task at hand is not simply to expand the geographical scope of privatization/marketization studies by charting new cases for the sake of it, applying existing theories to new contexts. It also involves ensuring that research emanating from these contexts contributes to reinforcing the existing knowledge base, challenging conventional wisdom when necessary, and raising awareness of the context-specific nature of explanations often assumed to be universally applicable.

3. FILLING THE VOIDS: THE POTENTIAL FOR AN INTEGRATIVE APPROACH

3.1 Bringing Different Disciplines into the Conversation

Education privatization and marketization have been examined from different disciplinary perspectives. Nevertheless, in recent decades, the sociology and economy of education have stood out in their scholarly production on this topic. Since the 1990s, sociological approaches have particularly focused on how different educational actors (e.g. families, students, school leaders, teachers) have enacted both market policies and the expansion of private provision. Examples of this include some of the works produced during the 1990s and the beginning of the 2000s with a focus on the families' processes of school choice and schools' responses to competition in the context of the pro-market reforms adopted in England (Glatter & Woods, 1994; Gewirtz et al., 1995; Woods et al., 1998; Ball, 1993), New Zealand (Waslander & Thrupp, 1995; Lauder et al., 1999; Fiske & Ladd, 2000), the US (Weiher & Tedin, 2002), and Europe (Raveaud & van Zanten, 2007). In parallel, the effects and impacts of privatization and marketization policies have been extensively analysed by economists, focusing on the impacts of the policies on various outcome dimensions (e.g. academic performance, social stratification, school segregation), as well as intermediate effects such as perception of competition and cream-skimming practices (Hoxby, 2000; Bettinger, 2005; Hsieh & Urquiola, 2006; Ladd, 2002; Levacic, 2004; Mizala & Romaguera, 2000; Woessmann, 2005).

The strengths and shortcomings of sociological and economic approaches to education privatization and marketization have led to a degree of cross-fertilization between both disciplines. In 1999, Nick Adnett and Peter Davies advocated for 'reconciling economic and sociological approaches' for the analysis of quasi-markets. These authors aimed to 'redress the paucity of cross-fertilization between economics and sociology and the tendency amongst social scientists to treat models from other disciplines as straw men' (Adnett & Davies, 1999: 222). Other examples of the combination of sociological and economic analytical frameworks are Lubienski's analysis (2006b) of schools' responses to competitive environments through the lens of monopolistic competition and Jabbar's (2016) analysis of actors' responses to competition and choice, which proposes overcoming under-socialized or agential approaches (characteristic of economic analysis) and over-socialized or structuralist approaches (often associated with sociological perspectives).

Other disciplines, such as political science and geography, have also examined privatization and marketization, albeit less prolifically. Political science has not engaged with education as much as other social sciences (see Busemeyer & Trampusch, 2011; Gift & Wibbels, 2014; or Jakobi et al., 2009, on the reasons for this omission). Geography, on the other hand, has paid relatively less attention to the privatization and marketization of education, in part because education research has lagged behind the 'spatial turn' that other social science disciplines embraced decades ago (Gulson & Symes, 2007). This does not mean that there are no valuable exceptions in both fields. For instance, analyses from political science have provided crucial insights into the factors and actors involved in the institutionalization and expansion of privatization and marketization arrangements (Ansell & Lindvall, 2013, 2021; Gingrich, 2011), their capacity to generate policy feedbacks that reinforce their legitimacy (Fleming, 2014; Asadolahi et al., 2022; Holyoke, 2022), or public opinion attitudes and preferences toward them (Busemeyer et al., 2020; Edlund & Lindh, 2021; Pöder & Lauri, 2022). Similarly, the

geography of education privatization and marketization has become a more relevant and prolific area of analysis in the past few years. Geographical approaches to education markets have explored school choice patterns, changes in student mobility and equity impacts (Chumacero et al., 2011; Taylor, 2009; Santos & Elacqua, 2016). Critical geographic approaches also account for objective geographical characteristics and the meanings that individuals assign to specific space locations (Bell, 2009; Yoon & Lubienski, 2017; Yoon et al., 2020)

Despite education privatization and marketization being a multidisciplinary field of study, cross-fertilization between disciplines and interdisciplinary approaches remain limited. However, authors increasingly use theoretical and analytical frameworks that combine insights from political science and policy studies, policy sociology and political philosophy to understand the drivers and evolution of these phenomena. Examples include studies that account for ideational factors such as frames or paradigms as determinants of policy adoption (Jabbar et al., 2022; Verger, 2014; Kristof, 2023), which combine insights from political science and sociological theories. Others emphasize the role of institutional factors, focusing on path-dependence dynamics, feedback effects or the role of partisan politics (Zehavi, 2012; Holyoke, 2022; Lachance, 2020). Additionally, recent studies have examined how decision-makers and families approach school choice policies by integrating sociological approaches with political philosophy or political science frameworks (Hernández et al., 2023; Daramola et al., 2023). Such interdisciplinary approaches hold great promise and represent an important step forward in accounting for the increasing complexity and multidimensional impacts of education privatization and marketization.

3.2 Considering Emerging Dimensions of Analysis

Alongside the global spread and increasing diversity of privatization and marketization, explanations of the determinants and outcomes of such policies have broadened, incorporating new dimensions of analysis. From a political economy perspective, considerable progress has been made in capturing and examining the diversity of privatization and marketization policy options. This is evident in the research on education PPPs, which highlights the variety of arrangements between private and public sectors that foster privatization and marketization (Robertson et al., 2012). Additionally, the expansion and growing relevance of independent private schools serving low-income students in the Global South have inspired a prolific literature addressing the drivers and actors behind the spread of LFPSs (Härmä, 2011; Srivastava, 2008; Tooley, 2013). Moreover, research on the adoption and global expansion of privatization and marketization policies has gradually incorporated a greater diversity of actors and drivers influencing these processes. For instance, greater attention is paid to the role of actors other than State actors and international organizations, including policy entrepreneurs (Boyd, 2007; Bulkley, 2004), corporations (Nambissan & Ball, 2010; Oppenheimer, 2010) or philanthropic institutions (Scott & Jabbar, 2014; Srivastava & Baur, 2016).

The dimensions considered when analysing the effects and impacts of privatization and marketization have also expanded, moving beyond traditional indicators of effectiveness, equity and efficiency. Notably, there is growing attention to the intermediate outcomes of these policies. Understood as impacts on individuals and schools, intermediate outcomes are increasingly recognized as essential to make sense of their aggregate impacts. In recent years, different studies have examined how schools respond to competitive incentives, with a focus on responses and strategies such as marketing and promotion (Greaves et al., 2023; DiMartino

& Jessen, 2018; Jabbar, 2016; Lubienski, 2006c), differentiation and pedagogical innovation (Jabbar, 2015; Lubienski, 2009; Zancajo, 2019), student selection (Jennings, 2010; Carrasco et al., 2017; Welner, 2013) and decisions related to geographical location (Gulosino & Lubienski, 2011; Lubienski et al., 2009).

Research on school choice processes has also broadened in scope. Today, this area of inquiry encompasses studies examining aspects as diverse as how families' rationalities are mediated by economic, geographical or symbolic restrictions (Ben-Porath, 2012; Bosetti & Pyryt, 2007; DeJarnatt, 2008), the diversity of choice strategies among different social groups (Bonal et al., 2017; Raczynski et al., 2010; Balarin, 2015), family satisfaction in school choice programmes (Rhinesmith, 2020) and the impact of phenomena like gentrification on families' choices (Ichou & Van Zanten, 2019; Maloutas, 2007).

Finally, research concerned with the ultimate impact of privatization and marketization increasingly considers the varying effects on different groups or individuals and examines a broader range of outcomes. Beyond traditional equity concerns related to social class or ethnicity, studies have explored the impacts on children with disabilities and migrant students (Waitoller, 2020; Waitoller et al., 2019; Welner & Howe, 2005; Beach & Dovemark, 2019; Bonal et al., 2019). Similarly, the effects on teachers and the teaching profession have gained attention, with studies analysing changes in the stratification of teachers' labour markets, work conditions or professional practice (Fredriksson, 2009; Jabbar et al., 2019; Baker & Dickerson, 2006). Pro-market policies have also been examined for their impact on educational diversification and pedagogical innovation (Lubienski, 2006b, 2009; Villalobos & Salazar, 2014; Fiske & Ladd, 2000).

3.3 Grappling with Policy Change

Privatization and marketization are not one-off events or static phenomena. Research on trends in marketization and privatization across countries reveals that their evolution does not necessarily obey a linear pattern. Not only are these policies often implemented as a result of contentious, back-and-forth dynamics, but even when they are in place, they are often adapted or adjusted over time. In some cases, these adjustments further entrench the market dynamics initiated by marketization schemes. Conversely, in other contexts, private education provision or school choice becomes subject to regulatory reforms aimed at curbing market-like dynamics. Examples include controlled-choice schemes (Cantillon, 2017) and changes in the public funding and accountability schemes for private schools (Boeskens, 2016; Elacqua et al., 2018; OECD, 2019).

The COVID-19 outbreak has rendered visible the ultimately fragile and contingent nature of market arrangements, with prolonged lockdowns and school closures sometimes leading to a shrinkage of private education provision (Elacqua et al., 2022; Musaddiq et al., 2022), the decline in Catholic school enrolment (MacGregor, 2012; Wodon, 2020) or the increase in the enrolment in charter schools (National Alliance for Public Charter Schools, 2023). Even if such trends have been short-lived and uneven, they ultimately indicate that marketization and privatization trends are not necessarily ever-expanding phenomena. While policy termination episodes are rare, market-like arrangements are likely to experience some form of reorientation and redesign. Gaining insight into the contemporary dynamics of privatization and marketization thus requires dealing with the question of policy change – understanding the actors, motivations and mechanisms behind such mutations.

While the transformation of marketization and privatization schemes is often precipitated by external changes (e.g. crises, government changes), their evolution is also shaped by issues arising from the policies themselves. For example, the inequalities triggered by marketization are likely to generate negative policy feedback or resistance from key stakeholders who are directly or indirectly affected. In various countries, growing awareness of school segregation has sparked political and policy debates about the role and regulation of private schools and school choice arrangements (e.g. Bonal & Bellei, 2018; Marsh et al., 2021; Sierens et al., 2011; Olsen, 2015). Emerging evidence suggests that, despite marketization's potential to transform subjectivities (Rizvi, 2016), such policies do not automatically or fully alter the preferences, behaviours and core values of education stakeholders and the general population (Arora-Jonsson & Edlund, 2024; Frederiksen, 2024). These dynamics create a fertile ground for policy change. The policy trajectories of privatization and marketization schemes are shaped by complex contextual factors. Consequently, despite some fundamental similarities, marketization and privatization policies can evolve in diverging directions in their goals, configurations and outcomes (Zehavi, 2011, 2012; West & Nikolai, 2017; Holyoke, 2022; Sude & Wolf, 2021).

Given the mutating nature of privatization and marketization policies, it is essential for researchers to move beyond the initial adoption moment and focus on processes of refinement and redesign. Addressing the dynamic nature of these arrangements provides a more accurate understanding of the multiple forces and motivations at play, as well as their ultimate impacts. For instance, emerging evidence shows that, despite the high hopes placed in them, the effectiveness of equity-oriented reforms aimed at taming market dynamics varies significantly, as seen in recent desegregation experiences in Belgium, Chile, France or the US (Danhier & Friant, 2019; Honey & Carrasco, 2023; Grenet et al., 2023; Margolis et al., 2023). Accordingly, the ultimate impact of such efforts is often modest due to implementation challenges and the opposition triggered by such reforms (Zancajo et al., 2022). Given that marketization and privatization are reshaped rather than fully undone as a result of regulatory and resistance trends, taking policy change seriously remains a relevant task.

4. OBJECTIVES AND STRUCTURE OF THE BOOK

The main objective of this *Handbook* is to bring together a series of works that address the research gaps and shortcomings outlined above. It aims to provide a comprehensive overview of the new theoretical, analytical and empirical developments in the field of education privatization and marketization studies, and to examine case studies of national and regional contexts often under-analysed in international literature. Additionally, some chapters exemplify the integration of various analytical and methodological disciplinary fields. While privatization and marketization have penetrated different education domains and areas of activity, the different chapters of the *Handbook* focus on formal basic education.

Chapters in Part I of the *Handbook* provide a comprehensive examination of various conceptual, theoretical and analytical frameworks for exploring education privatization and marketization, and synthesize recent developments and debates that can inform future research in this area. In **Chapter 2**, Christopher Lubienski and Joel Malin provide a thorough overview of how the definitions of privatization and marketization concepts have evolved alongside the expansion of these phenomena and their increasing complexity. Lubienski and Malin also

highlight key dimensions and conceptual considerations that need to be taken into account in future theorizations in this area. In **Chapter 3**, Jane Gingrich delves into the politics of education privatization reforms in Western countries between the end of World War II and the beginning of the neoliberal period in the 1980s. Gingrich examines the specific drivers and actors that influenced privatization processes in this period, with a particular emphasis on private subsidized education.

The following chapters in Part I focus on various recent methodological and analytical perspectives applied to the study of privatization and marketization in education. In **Chapter 4**, Jina Kim, Jeremy Singer and Christopher Lubienski present an overview of different theoretical perspectives and methodological approaches that have considered the role of geography in the analysis of privatization and marketization. Kim and colleagues cover a wide range of processes and impacts that may be influenced by geography and provide different examples of studies applying those perspectives and approaches, highlighting their strengths and shortcomings. In **Chapter 5**, Sarah A. Cordes explores the key theoretical assumptions of competition, a central component of market policies in education. Cordes also examines the evidence regarding the effects and impact of competition between schools on a wide range of outcomes, from test scores and school segregation to school resources. Xavier Bonal, in **Chapter 6**, examines how mechanism-based explanations can contribute to advancement in the identification of the causal links between privatization and marketization policies and different outcome dimensions. Bonal illustrates the potential benefits of mechanism-based approaches by examining the impact of school choice on school segregation. Finally, in **Chapter 7**, T. Philip Nichols and Alexandra Thrall analyse how platform technologies and markets are creating a new form of privatization, termed ‘platformed privatization’. Nichols and Thrall highlight the dual nature of these markets, which allow companies to provide products to educational institutions while simultaneously extracting data from users.

Part II addresses the question of how education markets unfold, bringing into focus the pluralizing nature of privatization and marketization. Chapters in this part are concerned with the historical development and the political economy of such processes in contexts that, for different reasons, remain under-examined, particularly within the field of educational studies.

The first group of chapters in this part is concerned with relatively recent developments. This is the case with some emerging trends observed in the US, including tax credit scholarships and education savings accounts discussed by Luis A. Huerta, Steven J. Koutsavlis and Trevor W. Baisden (**Chapter 8**). The authors trace the origins and evolution of such programmes, highlighting how they represent a departure from other private choice policies. Shifting the focus to the Global South, Joanna Härmä deals with recent developments in the low-fee private schools phenomenon (**Chapter 9**). Härmä delves into the regulatory challenges associated with this schooling modality and discusses the potential role of PPPs in addressing some of the most pressing issues. In **Chapter 10**, Ghulam Omar Qargha focuses on the recent privatization episode undergone by Afghanistan since the turn of the century. Qargha explores the drivers behind this process of education liberalization, foregrounding the role of State fragility and aid dependency. In **Chapter 11**, Triin Lauri, Kaire Põder and Joonatan Nõgisto examine the marketization process experienced by Estonia, Latvia and Lithuania since their independence after the dissolution of the Soviet Union. The authors discuss the different policy trajectories followed by the Baltic countries, highlighting the role of nation-building and the Soviet legacy.

A second group of chapters in Part II is concerned with contexts where private provision has long been a fixture of education systems. Some adopt a historical perspective, charting the evolution of privatization arrangements. This is the case of Anne Lachance's retrospective account of the origins and evolution of private schooling in Québec (**Chapter 12**). Lachance addresses both the institutionalization of subsidies for private schools and recent reform processes, with an emphasis on the changing relationship between the State and the Church. In **Chapter 13**, Ruichang Ding, Xinyi Zeng and Zhuoyan Han highlight the significant role that private schools have played in expanding education in China historically, as well as the contentious nature that private education has acquired in recent decades. As they show, in contemporary China private education has evolved significantly from a liberal era to a regulatory era, with increased control over international schools, restrictions on private tutoring and the publication of LFPs that mainly cater to domestic migrants.

In **Chapter 14**, Pascal Pax Andebo examines the historical and contemporary drivers of education privatization in Uganda. The chapter brings attention to the key role played by endogenous factors such as colonial legacies or the role of missionary initiatives, as well as exogenous forces connected to the neoliberal turn. Other chapters focus on the current organization of education systems where private provision has long been established. In **Chapter 15**, Georges Felouzis and Barbara Fouquet-Chauprade analyse the phenomenon of education privatization in France. The authors provide an overview of the governance of subsidized private education, school choice practices and more nascent privatization approaches such as home-schooling. Finally, Rita Nikolai and Bernard Brown focus on the regulation and financing of private schools in Germany, Austria and Switzerland (**Chapter 16**). Following a comparative approach, the authors capture the diversity of arrangements as well as the similarities across these countries.

Part III addresses the enactment and impact of education privatization and marketization, exploring how these arrangements affect the behaviour of different education stakeholders as well as their ultimate effects from an education-system perspective, particularly on equity. In **Chapter 17**, Emma Rowe provides an overview of the relationship between market arrangements and school segregation. Building on the expanding literature concerned with these issues, the author discusses both the causes and the consequences of such patterns, with a focus on segregation along socioeconomic lines. Complementing this perspective, Federico R. Waitoller discusses the complex interlinkages between school choice programmes and the rights and attention of students with disabilities (**Chapter 18**). Focusing on the US, Waitoller examines how these students are perceived by private providers both as an opportunity and a challenge, reflecting on the equity implications arising from such contradictions. In **Chapter 19**, Merike Darmody and Emer Smyth address the relationship between education markets and religious pluralism. With a focus on the Irish case, the authors examine recent challenges and policy developments oriented toward accommodating growing levels of religious diversity in the country. In **Chapter 20**, Sonia Languille and Maria Ron Balsera address the impact of PPPs from a cost-effectiveness perspective. Focusing on lower-income countries, the chapter examines different sources of evidence concerned with the cost-effectiveness gains conventionally expected from such schemes. Sticking to a macro-level perspective, **Chapter 21** addresses the relationship between education markets and public opinion. Jonas Edlund and Arvid Lindh analyse attitudes toward private provision and funding and toward different market-like features such as school choice across a wide array of countries, highlighting the role of political ideology behind attitudinal divisions.

Other chapters in this part are concerned with the impact of privatization and marketization on more specific areas of activity. In **Chapter 22**, Andrene J. Castro and Wesley Edwards discuss the impact of private providers of teacher preparation programmes. Focusing on for-profit suppliers, Castro and Edwards reflect on the risks and challenges posed by market reforms on teachers' work. In **Chapter 23**, Catherine DiMartino examines the impact of school choice policies on branding and marketing practices at school and district levels. With a focus on the US and the consequences of the rise of charter management organizations, the author reflects on the equity, transparency and accountability issues derived from such developments. Finally, Francine Menashy and Tavila Haque address the impact of marketization on the education-in-emergencies sector (**Chapter 24**). Menashy and Haque provide a comprehensive overview of the transformations brought about by market principles, including the growing participation of private actors, while signaling the tensions, inequalities and inefficiencies derived from such trends.

Finally, Part IV of the *Handbook* features a series of chapters that analyse how privatization and marketization policies have been resisted but also reformed as a consequence of problematization processes, particularly those concerned with equity. In **Chapter 25**, Marie Verhoeven and Vincent Dupriez examine the problematization of market policies in French-speaking Belgium as a consequence of school segregation, and the reforms adopted during the 2000s. Dupriez and Verhoeven's chapter provides a comprehensive account of the reforms implemented, their impacts, and the coalitions in favour and against these reforms. Similarly, in **Chapter 26**, Alejandro Carrasco examines the difficulties faced by education reform adopted in Chile in 2015 to ameliorate the role of the market in the education system, as well as counter-reform attempts led by conservative political sectors and middle-class families. Carrasco's chapter explores the opportunities and challenges of education market regulation in one of the countries with a more market-oriented education system. In **Chapter 27**, Stéphane Vigneault examines the increasing problematization of the market-oriented approach of Québec's education system and the strategies developed by École Ensemble, a civil society organization, to influence the public debate and advocate for a process of reform. This insider perspective from the coordinator of 'École ensemble' provides meaningful insights into how they have mobilized public opinion and engaged policymakers to achieve their objectives. Joshua Childs and Hanora Tracy, in **Chapter 28**, explore how the regulation of charter schools in the US has evolved to address the negative impacts and unintended consequences of their expansion. Using the case of New Orleans, the chapter argues that regulatory reforms in charter schools aim to balance school autonomy and equity. The next two chapters analyse the processes of regulation of private provision in two countries of the Global South. In **Chapter 29**, María Balarin and María Fernanda Rodríguez provide a comprehensive account of Peru's initiatives attempting to regulate private schools. Balarin and Rodríguez analyse these initiatives in the political context of the country and the role of actors opposing these regulatory attempts. Emmerich Davies and Abhinav Ghosh, in turn, examine private provision regulatory efforts in India, with a focus on contemporary initiatives. The authors not only analyse the objectives of regulatory policy but also the inconsistencies in their implementation, the resistances they generated and their unintended effects (**Chapter 30**). Finally, and going beyond processes of policy reform, Hava Rachel Gordon (**Chapter 31**) explores teachers' movements of opposition to marketization in the US. Through case studies in various US states, this chapter highlights the variations in teacher activism regarding coalition-building and tactics of protests and resistance. Overall, these chapters provide new insights into the dynamics of privatization and

marketization by illuminating new cases, new trends, and new theoretical and methodological perspectives.

NOTES

1. This complexity becomes even more pronounced when considering the numerous educational activities and levels that configure educational systems. However, in the interest of coherence and to facilitate academic dialogue, this *Handbook* focuses specifically on the privatization and marketization of school provision in basic (primary and secondary) education levels. Education privatization and marketization are also present in other educational levels and domains (e.g. higher education, early childhood education and supplemental education).
2. We use here the term 'education studies' to include different academic disciplines, such as sociology, philosophy, psychology or history, that comprise the interdisciplinary analysis of education in Anglo-Saxon countries (Biesta, 2011).
3. They are, however, more common in child care services or education services other than the provision of *core* education at primary and secondary levels. Also importantly, charitable exemptions and tax breaks related to the consumption of education services can be found in a variety of countries (Sinfield, 2018); however, such provisions are often not explicitly oriented at encouraging or supporting private provision but result from the general tax structure, and are generally of little consequence for the private/public mix.
4. To be sure, tuition tax credits and comparable systems are not entirely a recent phenomenon (see Belfield and Levin, 2002). However, their relevance, both in political and coverage terms, is much more recent.

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Jina Kim is a postdoctoral fellow at Johns Hopkins University. Her research focuses on educational equity, policy and legislative impacts on educational and social equity, and the geo-spatial analysis of educational access. Her dissertation comprises three studies analyzing varying educational opportunities across geography on issues like national-level analysis of educational opportunities, college access, and special education law using innovative geo-spatial theories and methods. Jina obtained her Ph.D. in Education Policy Studies at Indiana University Bloomington. Prior to pursuing her doctoral studies, she worked as a research assistant at the National Assembly Research Service in South Korea. She holds an MA in Education from Seoul National University, writing her thesis on North Korean defector students' education. She also holds a BA in Political Science from McGill University in Canada.

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Steven J. Koutsavlis is a PhD candidate in Education Policy at Teachers College, Columbia University, and a Research Associate at Columbia's National Center for the Study of Privatization in Education. Steven is a National Board Certified Teacher and Math for America Master Teacher Fellow, having taught secondary mathematics for nearly twenty years in district schools. He is keenly interested in community affairs and policy issues, having served as a field director for a state political campaign and helping to launch the NYC Academy for Discovery as a new school founding member. He was born and raised in New York City and is a graduate of Dartmouth College and Stuyvesant High School.

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Triin Lauri is an Associate Professor of Public Policy at Tallinn University's School of Governance, Law, and Society. She holds a PhD in Government and Politics, and has been a Postdoctoral Fellow at the University of Konstanz and a Departmental Lecturer in Comparative Social Policy at the Department of Social Policy and Intervention at the University of Oxford. Her research mainly focuses on comparative social policy, with a particular interest in social investment policies, educational inequality and politics of education.

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Joel Malin is an Associate Professor of Educational Leadership at Miami University. His scholarship focuses on knowledge mobilization, research–practice–policy connections and the politics of education. With Chris Brown, he has recently authored two edited volumes, *The Role of Knowledge Brokers in Education* and *The Emerald Handbook of Evidence-Informed Practice in Education*. He is currently engaged in two research projects, funded by the National Science Foundation and the Wallace Foundation, examining evidence use and knowledge mobilization in education.

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Rita Nikolai is Professor for Comparative Education at the University of Augsburg/Germany. Her research focuses largely on school politics, private schools and the role of actors in school politics. Her recent publications include *Politics of School Choice in Germany* (together with Line Saur) and *The Contestation of Policies for Schools During the Covid-19 Crisis* (together with Bernard Brown).

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Kaire Põder is an education economist who works on various topics related to educational equity and inequality. Her methodological toolbox covers various tools regarding quasi-experimental

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Ghulam Omar Qargha is a Fellow at the Center for Universal Education at the Brookings Institution. His expertise includes policy analysis, program design, teacher education, curriculum development and educational delivery, especially in fragile and conflict-affected contexts. Qargha's current research focuses on exploring the role of culture, local education ecosystems and prevalent learning theories on pedagogical choices through collaborative research.

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Dr Maria Ron Balsera is the Executive Director at the Center for Economic and Social Rights (CESR). She is a feminist leader with a proven commitment to collaborative research and advocacy, as demonstrated through her work with national, regional and international coalitions in Africa, Asia and Latin America. Maria finished her PhD in Education and Human Development from Bielefeld University in 2014, on a Marie Curie Fellowship. She also holds an MSc in Human Rights from the London School of Economics and an LLM in Human Rights from Universidad Carlos III in Madrid. She has done research at the Institute of Education (UCL) as a visiting Research Associate and at UC Berkeley through a research exchange program.

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Emma Rowe is a Senior Researcher in the School of Education at Deakin University. She was a Fulbright Postdoctoral Scholar (2020) and leads a nationally funded project about venture philanthropy in public education (funded by the Australian Research Council 2021–2024). Emma's research is interested in policy and politics in education. She is a Lead Editor of the *Journal of Education Policy*.

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Alexandra Thrall is a doctoral student in Baylor University's Department of Curriculum & Instruction. Her research investigates the sociotechnical arrangements that could undermine or support justice-oriented teaching and learning, particularly in humanities classrooms. Alexandra has an MEd in Curriculum & Instruction from the University of Texas at Austin and has served as a 4th–12th grade teacher and academic administrator in Texas and California.

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Hanora Tracy is a doctoral candidate in Sociology and part of the City, Culture, and Community program at Tulane University. Her current research interests are accessibility and inequality in education as they relate to race, language and ability; English as a Second Language, bilingual and multilingual special education students; and teacher retention rates as they relate to student success.

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Antoni Verger is a Professor of Sociology at the Autonomous University of Barcelona and a Research Fellow at the Catalan Institution for Research and Advanced Studies (ICREA). His research examines the relationship between governance institutions and education policy through comparative policy analysis and sociological perspectives. Over the years, his work has specialized in the study of education privatization, public–private partnerships and school governance reforms.

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Marie Verhoeven is a Professor of Sociology at UCLouvain, where she teaches Sociology of Culture, Sociological Theory, and Qualitative Methods. She was (Co)Director of the Interdisciplinary Research Group in Socialisation, Education and Training (GIRSEF; <https://uclouvain.be/en/research/girsef>) from 2018–2022. Her research explores the social and normative transformations of “late modernity” and their impact on educational systems and on socialization/identity building amongst adolescents. She has published several papers on

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After studying political science (University of Ottawa, Sciences Po Strasbourg, Stockholms universitet), Stéphane Vigneault worked in Québec and abroad in the field of public policy and communications. After completing a diploma in Management of Cultural Organizations at HEC Montréal, he worked as a consultant in the arts. He is one of the co-founders of École ensemble and is its Coordinator.

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Federico R. Waitoller is a Professor in the Department of Special Education at the University of Illinois at Chicago. His research focuses on education with two primary lines of inquiry: the educational access, experiences and outcomes for urban students with disabilities in relation to market-driven education policies (i.e., policies that incorporate market principles for the delivery of public education) and the development of professional learning and pedagogies for inclusive education.

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Adrián Zancajo is a Ramón y Cajal Researcher at the Department of Sociology of the Autonomous University of Barcelona. His research primarily examines the privatization and marketization of education. Currently, his main research focuses on desegregation policies within market-oriented education systems, as well as other reforms related to education market policy instruments.

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Xinyi Zeng is a postgraduate student at the Institute of International and Comparative Education, Beijing Normal University. She is mainly engaged in international and comparative education research.

